# ServiceTrade Demo with Mechanical Technologies

Brooke Caskey with Mechanical Technologies
Recorded on 2/22/22 via Zoom, 1 hour 26 min.

# Participants

### SERVICETRADE

Brooke Caskey
*Territory Manager*

Tommy Polcari
*Associate NorthBoundary Account Executive*

### MECHANICAL TECHNOLOGIES

Travis Bushey
*Senior Service Sales Representative*

### OTHER

2 Jared Wilke 8U

# Topics

# Transcript

#### BROOKE

0:00  Hey, Travis.

#### TRAVIS

0:01  How's it going this morning?

#### TRAVIS

0:08  With me, my kids have a snow day today. So, the, I had to work from...

#### BROOKE

0:12  Home.

#### TRAVIS

0:13  I get up.

#### BROOKE

0:15  That's good. Snow day. Sounds fine. How many kids do you have to verify? Are we waiting on Jared?

#### TRAVIS

0:26  Yes, my Zoom, for some reason, we decided to update.

#### BROOKE

0:34  No problem.

#### TRAVIS

0:37  Logged in. So, I'll just message him.

#### BROOKE

0:41  Cool. Cool. And while I have you here, I have you down as the owner and Jared as a service manager is not the right order of hierarchy. Okay, perfect. Cool. Well, we can wait a couple of minutes for him before we get going.

#### TRAVIS

0:55 I'll text him right now.

## 2 JARED WILKE 8U

0:57 Okay.

## TRAVIS

1:10 Where are you based? Are located?

## BROOKE

1:13 I am, I'm I live in Raleigh, North Carolina.

## 2 JARED WILKE 8U

1:16 Okay. Yeah.

## BROOKE

1:18 What about you guys?

## TRAVIS

1:20 Wisconsin...

## BROOKE

1:21 Okay. Because I thought it was looking at our website this morning. I saw Wisconsin up to wasn't Michigan that you do service, very cool.

## TRAVIS

1:29 So, we have offices, our corporate offices in green bay, and then we have an office in Madison, and then I am based out of a player, which is in our use the Minneapolis.

## BROOKE

1:41 Okay.

## TRAVIS

1:42 So, I have an office out here as well. So, we cover the entire state of Wisconsin and Michigan and a little bit of Minnesota.

## BROOKE

1:53 Cool. I was just very cool.

## TRAVIS

1:59 Whereabouts...

## BROOKE

2:00 I visited a friend in Minneapolis.

TRAVIS

2:03 Nice.

BROOKE

2:04 Yeah, it's my first time there. Okay? It looks like Jared here. I don't know if he's connected to audio though, Jared, can you hear?

2 JARED WILKE 8U

2:12 Hello? Yeah.

2 JARED WILKE 8U

2:13 I can hear you?

2 JARED WILKE 8U

2:14 Man.

BROOKE

2:15 Yeah, I can hear you just fine. Cool. Okay. Are we waiting on anyone else? I just hadn't you to Jared on... on my attendees list.

TRAVIS

2:23 No, for right now, that's just the two of us.

BROOKE

2:28 Perfect.

2 JARED WILKE 8U

2:29 Well...

BROOKE

2:30 You both for taking the time to join me today. Quick introduction. My name's Brooke. I'm one of the territory managers here at service trade, and really, my goal for today is to walk through service trade to determine if it's gonna be a good fit for what you guys are looking to accomplish. I think the best way to go about doing that is first, let's have a quick discussion about what you guys are currently doing your goals for the business and how service trade will tie into those.

*--- Purchase decision ---*

BROOKE

2:53 From there, we'll take a look at the platform. If at the end, it seems like a good fit. We can discuss next steps at that point. Does that sound okay?

TRAVIS

3:00 Yes.

2 JARED WILKE 8U

3:01 Okay.

TRAVIS

3:02 Jared, do you want to kick off a little bit and tell Brooke about exactly what we do?

--- *Type of work* ---

2 JARED WILKE 8U

3:07 Yeah. We're in Mechanical contract. You're located in northern Wisconsin? Yeah, control division, service division, where they're making division... plumbing, pipe, fitting and sheet metal. Currently, we're looking at about 15 to 20 users in the field and about eight to 10 in the office.

BROOKE

3:29 Okay.

2 JARED WILKE 8U

3:30 Focus in right now, more on a preventative maintenance service agreements, service tickets and also getting it implemented with our construction field guys off a new project construction. Okay?

BROOKE

3:46 So, real quick, let's talk about those 15 to 20 users in the field. Are all of those users doing service? Are those some service, some construction?

2 JARED WILKE 8U

3:55 It'll be some of the box. They'll be some service something construction. Okay?

BROOKE

4:00 How many of those are service? How many of our construction? Just?

2 JARED WILKE 8U

4:04 Be about 10 and service then involved remaining would be... the construction site.

BROOKE

4:12 Okay. And then for your construction, I'm typically, how long are your projects, last name?

## 2 JARED WILKE 8U

4:21 Currently, where between three days to six months to a year? Okay?

## BROOKE

4:28 So, given the name service trade, we're definitely built for more of the service operation side, we do have customers using us for the construction side, but we recommend once you get past that 90 day mark, that's kind of where we lose our ability to... to help with the... the construction tracking, the project tracking, we look for companies doing 90 days or less as majority. So as a majority, would you say them that most of your construction is 90 days or less?

## TRAVIS

5:00 The small projects stuff I would say is the quick turn stuff, but our majority of our construction projects, the bigger stuff is probably 90 to that year mark.

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

## BROOKE

5:11 Okay. So, how are you guys tracking you construction projects now?

## 2 JARED WILKE 8U

5:18 We're doing them based on excel docs that we have hours of labor and material cost onto that. And it's going... ongoing report based on our hours in our actual across numbers and actual cost, materials, perfect cost.

## BROOKE

5:40 Yeah.

*--- Type of work ---*

## BROOKE

5:41 So as we're going through service trade today, definitely focus on this more through the lens of service work great for our tracking like recurring service, preventative maintenance tracking assets. I'm tracking job history, reporting deficiencies taking advantage of repair opportunities that's what service trade is built for. We work fine with shorter term construction. But in most cases, we recommend you handle construction outside of service trade. Once we hit pass that 90 day mark, I have a few recommendations I can make to you. As far as companies go, I know we're partnered with a company called pro core. And so if today's meeting goes well, I'm happy to send you information about them. But point being as we walkthrough this focus on service today. Is that okay with you guys?

## 2 JARED WILKE 8U

6:27 No.

TRAVIS

6:27 That would be good. And like I said, we'll take the first step and.

BROOKE

6:31 Yeah.

TRAVIS

6:31 See what capabilities you guys can handle? And if we gotta look further down the road that possibly pro core for the construction side and have two separate things?

BROOKE

6:42 Yeah.

TRAVIS

6:43 Let's take a peek at it and see what helps company?

BROOKE

6:48 Yeah, because we found that service and construction just have to completely different sets of needs. And so we... we do our best to focus on what we're good at what we're built for, which is service. So on that note, the type of service you guys are doing and it looks like 100 percent commercial industrial, which is perfect. That's what we're built for... in terms of like emergency service versus recurring preventative maintenance style service. What would you say? The percentage breakdown is there?

TRAVIS

7:17 Sorry, I was writing jotting notes on. Can you repeat that?

BROOKE

7:20 Okay. Okay. In terms of like emergency service calls, hey, this purpose morning versus preplanned service. We need to get that out there every month every six months or so. What's the breakdown there?

2 JARED WILKE 8U

7:35 Gotta before right now, as far as we do more deep and apps we got... we're that's what we're also looking at software for us to track or perhaps and build out our program.

BROOKE

7:50 Okay.

2 JARED WILKE 8U

7:52 Hi, is that all I would probably say? 60 40 per SE, service?

BROOKE

7:57 60 percent emergency, but looking to grow PMS. Okay. Awesome. So when it comes to service, that's exactly what we're built for it's tracking... you know, preventative maintenance, that... that type of service. Cool. So that will be a major thing with the demo today. Are you guys, when you guys go out for your... for your maintenance calls, are you guys taking advantage or looking to take advantage of additional repair opportunities?

*--- Deficiencies ---*

TRAVIS

8:31 Yes.

BROOKE

8:31 Okay. What's the process there right now?

TRAVIS

8:38 Jared?

2 JARED WILKE 8U

8:40 What was that?

BROOKE

8:41 So, say you're going out for maintenance, maybe on let's say like an H back unit, you find it, that additional issue with the track unit and you want to take advantage of that repair. How is that we call them deficiencies? How is that deficiency found and documented and given to the right person to... to perhaps quoted out right now?

2 JARED WILKE 8U

9:00 But no other, either they'll call me and say this problem here, this is what we need or they'll send me a picture... and then I'll write up a quote and... send it.

BROOKE

9:15 Okay. So Jared, you're doing the quoting?

2 JARED WILKE 8U

9:17 Yeah... perfect. So.

BROOKE

9:23 Go ahead.

TRAVIS

9:24  Brooke, in my past life, I worked for a different contractor and what you're talking about as familiar, we could actually use pent up before.

*--- Deficiencies ends ---*

TRAVIS

9:33  And what ended up happening is when he had a preventive maintenance, the guys could write something up in the deficiencies, they could track that as part of the HPC preventive maintenance and it would come back to this dashboard and we could pull into a quote right off. It sounds exactly what you're talking about.

*--- Deficiencies ---*

BROOKE

9:50  Yeah. Yeah. It was that helpful for you when you were you like that? Yeah, yeah, exactly. I have not run into penta quite yet, but it sounds like a useful platform. But exactly, and especially with like I'm having the ability to attach like pictures, videos, audio my most to make more sense of the quote for both the office and the customer.

*--- Paper process ---*

BROOKE

10:11  That's gonna be a vital part of service trade as well for you all. But it sounds like right now, as far as your service carbon goes, most of your operations are done more manually, you know, phone calls, email, pen and paper. Tommy left me a few helpful notes here.

*--- Assets ---*

BROOKE

10:27  He said something that you guys wanted to improve was a history of tracking and equipment tracking. Why is that important to you?

TRAVIS

10:37  Because right now, we are not tracking it. When we do our excel estimates for customers and we're doing a preventive maintenance. We basically put all the data model, serial numbers, equipment tonnage be to use whatever filters, you know, attach as much information do is we can basically just gets housed in a folder on our server. So we had to go back big into it. Course customer has an asset ID number. We'd like one central software where we can start tracking and say, all right, we spent the last year on this. One piece of equipment, had 10 service calls and spend 10,000 dollars.

*--- Deficiencies ---*

TRAVIS

11:16 All the piece of equipment. Let's say it costs five grand to replace. Why are we looking at the big picture and say, you know, what the costs are exceeding? What is this for the new equipment? Why don't we talk about replacing?

BROOKE

11:28 Yeah. Okay. Perfect. So really built for the customer to make the best recommendation is the reason for that.

--- *Recurring maintenance* ---

BROOKE

11:35 Okay. Where else? Aside from history tracking, obviously the... the more common ones streamlining information, not letting things slip through the cracks. Where else do you see the most room for improvement and your day to day?

TRAVIS

11:49 The other part would be, is like the inspection tasking reports and stuff like that housing that within that specific time, let's say it's a spring PM for a certain building.

--- *Recurring maintenance ends* ---

TRAVIS

12:01 That stuff doesn't get tracked very well or get handed over to the customers. Like we'd like to give them some value on a preventive maintenance and say, after we did use inspections, this is what we all talk. So this is what we did record it, all this data. And now, what do we do with it?

BROOKE

12:18 Okay, perfect. So really presenting the work you did to your customer, you know, to justify maybe the Bill they're about to pay or, you know, using US or provider because of the information you're... you're giving to them.

TRAVIS

12:32 Correct? Because even like property managers would like to see that as well was many buildings that they are.

--- *Type of work* ---

BROOKE

12:38 Yeah. And that's a huge reason why we're built for commercial industrial contractors. Property managers is a great example. A lot of our companies are customers work with... with that type of workflow? So I'll show you exactly how the data breakdown would work. As far as, you know, main headquarters, multiple locations, how you track all of those?

--- *Recurring maintenance* ---

TRAVIS

13:01 But what about generating quotes from the efficiencies? Is that something I know, software that takes just minutes I do, because everything auto populate from the customer location, the name, address, physical billing location, and all that stuff. And just the general description with the work that's going to be done?

--- *Recurring maintenance ends* ---

BROOKE

13:20 Yep. Yep. So we call that our deficiency loop. I am definitely going to walkthrough an example of that today. That's probably the main feature in service straight a company. And by the quoting that our customers get the most excited about. So I'll be excited to hear your thoughts on that.

--- *Implementation and ongoing support* ---

BROOKE

13:37 As far as a timeline goes, once you guys find the right fit for you, ideally, when would you like to have a system up and running?

TRAVIS

13:47 April fifteenth, is that realistic?

2 JARED WILKE 8U

13:50 Yup.

TRAVIS

13:51 Or window?

BROOKE

13:53 Okay. Let me, let's talk about that for a second. So given your size and I know we still need to get into the platform, but given your size, I would definitely recommend either selector premium, the difference between stuck in premium, and of course, this will all depends on your budget.

--- *Customer engagement* ---

BROOKE

14:12 Is a few things on premium. You'll have a customer portal that your customers can log into. They can request service, see their pending invoices, deficiencies, the upcoming and past service they can log into that you also have the ability to sub contract work if need that. And then also custom integration support. So that's premium, and then select you'll have that Quickbooks integration. You won't have the portal and what we're going to walkthrough today. For the most part, it's gonna be select. I'm... I'm happy to show you the portal. If it... if it sounds like something that might be beneficial to you?

## 2 JARED WILKE 8U

14:47 You're...

TRAVIS

14:47 Just...

BROOKE

14:49 Yeah. Okay.

TRAVIS

14:50 I would say premium that's the slack doesn't have it, let's bypass lightning premium.

BROOKE

14:56 Okay. So that... that in mind you onboard people according too their size and what tier they sign up for. So the good news for you is that premium we can get you in a little bit sooner.

--- *Implementation and ongoing support* ---

BROOKE

15:12 Let's say hypothetically let's say today or within the next week, you're able to, you're able to say, okay service rates, right? Fit for me. I could get you in to begin onboarding, which would take approximately 90 days for a shop for size. I can get you in around March fifteenth. And so by April fifteenth, I feel like you guys would at least be perhaps set up enough to use it in the field very lightly. I'm not completely onboarded of course, because of that, the 90 day window. But as soon as you guys sign on, you guys have, you know, the keys to the account and you could, you guys can go in and begin, you know, looking around in it putting information and you'll also be paired with our project management team to do all of that.

--- *Purchase decision* ---

BROOKE

15:54 So April fifteenth, it's not realistic to be completely set up by then, but it is realistic to be in the process.

TRAVIS

16:03 Wouldn't may first be more realistic.

BROOKE

16:06 So, just think there's one that gets you in if we're able to make a decision in the next week or so.

BROOKE

16:13 Those folks, your first... your first come first serve. From there, it moves two weeks out. And then from there, it's... it's an average of 90 days to get completely onboarded for a company, your size.

2 JARED WILKE 8U

16:24 Yep.

TRAVIS

16:26 That's I'm glad you told us that because.

2 JARED WILKE 8U

16:29 That's...

TRAVIS

16:29 All got a point there decision as well.

*--- Purchase decision ---*

BROOKE

16:32 Yep. Okay. And so my next question there is, and when are you looking to make a decision by?

TRAVIS

16:37 We're looking at five other software companies right now, I think Jared and I, we, by the March fifteenth was a tentative deadlines like rector.

2 JARED WILKE 8U

16:53 Right.

BROOKE

16:55 So that in mind.

2 JARED WILKE 8U

16:57 By...

BROOKE

16:57 March fifteenth, that date would probably be pushed out closer to me to get even thing. So in terms of making your decision, if you want to stop that spot, I guess that would depend on when your other demos are, when over what spanner, you guys demoing the other five softwares?

TRAVIS

17:14 Next week? Okay? We got them. So basically review everything, make sure which company is going to be the best fit for us. And then I'll probably talk to like our controls department head as well and just get everybody on board and maybe have one last meeting if anybody had any other questions on.

BROOKE

17:38 Yeah.

TRAVIS

17:38 All the trigger to make a decision. I don't want to drag it out. I longer I have to because we want to be ready for the spring time. Do you have? And I already know are going to be behind? Yeah.

BROOKE

17:49 Okay. Perfect. Cool. At the end, the meeting in this seems like a good fit for real and we can discuss kind of have a timeline on how... how we want to check in and keep each other up to date on your progress in... in your evaluation and our... our room for getting you started on the date you want to... have you considered a budget for software.

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

TRAVIS

18:10 No, because everything that we looked at is either price per person in the office, price per person in the field or it's a lump sum.

*--- Purchase decision ---*

BROOKE

18:20 Okay.

TRAVIS

18:21 And this is just starting to take the wheel off. I don't know. I kinda got a gut feeling what price per office person or tack would be overall. I have no idea what it costs if you've heard by the software. All right?

BROOKE

18:36 Okay. Is your budget dependent on the best fit?

*--- Purchase decision ends ---*

TRAVIS

18:41 Yes, right. And the money portion, I'm not overly concerned about because it's going to be ongoing. We're gonna use it for the rest of our life span. That's okay. As

long as it works, good, blends with outlook and we can pull data as much data as we can get.

<center>*--- Pricing ---*</center>

### TRAVIS

18:57  And like I said, it's a good fit. I don't know if it's 25,000. I don't know if it's 15,000. Yeah, I don't know what that numbers.

### BROOKE

19:05  Okay. Yeah, we'll discuss pricing today. I'm given it seems like a good fit. Of course, last question I have for you and this is my own curiosity. What are the five platforms you're looking?

<center>*--- Pricing ends ---*</center>

### TRAVIS

19:17  What do you mean when you say platforms?

### 2 JARED WILKE 8U

19:20  Yeah.

### 2 JARED WILKE 8U

19:26  Definitely.

### BROOKE

19:27  The other side, the other five?

### TRAVIS

19:30  Same pro. I'd have to look.

### TRAVIS

19:39  Second one.

### 2 JARED WILKE 8U

19:40  That it was the BuildOps Travis?

### TRAVIS

19:48  I gotta pull up the emails. Okay? Mobile logic.

### BROOKE

19:56 The reason I ask is I'm just curious what's most important to you as you run through these demonstrations and selecting your software.

TRAVIS

20:04 Right now, it is service for service based, and if we come across something that is uniform for the entire company, so, I'm looking at that option as well, but it also depends on costs because not, we have a cost that will have to pass onto the customer for technology and software for using this product?

BROOKE

20:26 Hello?

TRAVIS

20:28 And usability, you know, managing it, getting intuit, customer support. The other part is my past life is, are there are gonna be software updates? Do they happened during the day that happened after hours? Number? A lot of things with us being a service provider, there's a lot of different moving parts. And if we lose downtime on it, that's going to affect this. I gotta step out and yell at my kids here.

BROOKE

20:57 That's okay.

TRAVIS

20:57 Hey, for a minute.

2 JARED WILKE 8U

20:59 Go ahead.

BROOKE

21:02 Jared, when he says downtime, do you, are you referencing like a system going down like going off-line...

2 JARED WILKE 8U

21:09 It would be like for our guys in the field, you know... middle of our workday and our system isn't functioning and we can't give you all of our half hour. I didn't know that upfront?

BROOKE

21:25 Yep. What I'll say about that is my job is to demo service trade all day and utilize the platform. And I haven't had any issues with it going down. It's a software not gonna say it's it can never go down. But as far as feedback from our customers, that's not something that... that we run into often.

2 JARED WILKE 8U

21:44 Well, that, and when does the maintenance done on it on the software side, it's not at midnight or is that not at the time? Or do you guys have a predetermined time?

BROOKE

21:54 Yeah. So we handle the maintenance on the back end. I'd have to check really like how they plan that out and how they notify you guys as far as I know, I think you guys would get like a heads up email like, hey, we're going to be doing this update at this time so that you guys can plan ahead.

*--- Tech time tracking ---*

BROOKE

22:10 But usually, I've... I've never seen them take beyond let's say like five minutes. Those are important question stamps are too.

TRAVIS

22:21 Cause might like I said, last one we had anywhere from a half an hour to an hour and a half where they would happen randomly throughout the day because of bugs and stuff they have to fix. And all the guys in the field access or user ipads during that time period?

*--- Access to information ---*

BROOKE

22:37 Yeah. The news for your guys in the field is not service trade... service trade is accessible offline. So even if they're not connected to internet, they can still complete their work. Okay? Yep. Cool. I feel like I have enough information to go ahead and get started. Any questions for me before we look at the platform?

*--- Access to information ends ---*

TRAVIS

22:59 No. Well, yes, can, how easy is it to pull data and maybe your walkthrough this portion of it and then with Quickbooks as well or should I just hold my questions to lead at all? Hold them though because you might have?

BROOKE

23:14 Well, okay. Do you think there definitely ask me questions throughout as you're... as you're noticing things? I'm... I'm happy to talk through things as we go. When you're saying data, are you talking about getting your data into the system?

TRAVIS

23:26 Yes, that portion and then could like revenue for let's say, or Madison Claire regions can be broken out that way or company?

## BROOKE

23:36 That is a question I need to talk to my manager about you're talking about like seeing how much each office is making versus how much you're making as a whole company?

## TRAVIS

23:46 Let's say we put sales goals in place per each office and then you can follow up monthly on revenue and be like, all right, we're not in that.

*--- Implementation and ongoing support ---*

## BROOKE

23:54 Yeah.

## TRAVIS

23:55 Or we're blowing it out in the water.

## 2 JARED WILKE 8U

23:58 Off the top of my head, I feel like...

## BROOKE

23:59 That's something you might track and Quickbooks, but there's definitely first trade that would help you gain access to those numbers. But let me write that down real quick. Just, I have a meeting with him after, so I will run it by him.

## BROOKE

24:17 But in terms of getting your data into the system that's all part of the onboarding process. If today service trade seems like the right fit for you all. So I'll send you the onboarding document. Essentially what we would need from you is your customers, items, customer equipment, services given us either in an excel or CSV format and you'll be paired with your project manager, of course, and we do a lot of the heavy lifting and getting all that information uploaded for you. Never say we do all of it because we don't definitely handholding process that is part of the onboarding. Cool. Did that answer your question? Yep? Yep. Okay. So what I'll do here is I'll go ahead and share my screen.

## BROOKE

25:03 Before we look at service trade itself, just a quick background context for you, all you guys can see where it says Brooke, right?

*--- Implementation and ongoing support ends ---*

## BROOKE

25:10 And there's a big building. Yup... yup. Okay. So service trade. We got our start about 10 years ago. Now we started and fire protection, life safety, and then

expanded outwards into Mechanical, electrical, plumbing, H, VC, so on and so forth. We're at about a 1,000 customers now across the US and Canada. But the reason service trade was built in the first place is because our CEO Billy Marshall, he saw a major disconnect when it comes to service contractors like yourself, your customers and your customers really grasping the great work you do for them. So with this in mind, he wanted to build a platform then not only would make things easier and turn for commercial service contractors, but would allow you to put your best foot forward to your customer or provide a premier level of service and intern, grow your business. So with that process in mind, our customers see an average of eight, 23 point four percent growth percentage year over year within their service department, using service trade, we help you achieve this in a few ways. The first and my favorite to... to chat about with people is definitely helping you operate efficiently.

*--- Customer engagement ---*

BROOKE

26:16 In order for any business to do this, you have to have a solid Foundation. And that really starts with how you're running and maintaining your day to day. So with this in mind, and we want to help you give your technicians the right resources. They need to be successful and doing their work in the field, provide the best level of service possible. That way you can maintain and expand those relationships with your customer. Speaking of your customer. Another major theme of service trade is improving and enhance the relationships you have with them. I'm not to say you're not doing a great job at this already. But a lot of times we'll... we'll kind of come to find that you might chat with your customer either when there's an outstanding issue to be fixed or maybe appending about. So our thought process here at service trade for you all as to get your name out in front of them more often through things like maybe sending it in route notification saying, hey, your technician, Brooke is on the way here's, your photo. She'll, be there in 15 minutes or maybe providing them with the customer portal. That way they can log in, see their own information, see their outstanding invoices, see, pass an upcoming jobs, request service, allowing them access... access to that or maybe a post service report outlining the work you did for them, the deficiencies, you fix the services, you complete with pictures, videos and audio memos, I'm just providing them, that vital info so that they feel confident in using US or provider. And then finally deficiency is as I go through the... the platform today, the word deficiencies. I'm referring to those repair opportunities. So in service trade, we look at these as a huge deal for you guys essentially just called sitting on the table because the easier it is for your technicians to document these repair opportunities, you know, with the correct attachments, pictures, videos and all that have that documentation, relate back to the office in real time. So exactly... exactly like you said, you guys can get that quote it out as soon as possible. We also wanna make it really easy for your customers to approve the quotes with just the click of a button which will go through today. Because the faster we closed, the faster you guys can make those repairs and pull in that additional revenue that's where a lot of that 23 point four percent comes from is how easy we make deficiency tracking... and how does it work? Any questions on any of the major service trade leads I just went over?

TRAVIS

28:32 No, the... the deficiency stuff is the major cash flow just from my past experience because 99 percent of the customers won't even go out and get pricing on it. Yeah, once or I mean that capital portion of it's huge.

<div style="text-align: center;">BROOKE</div>

28:47  Yeah, exactly. Okay. Cool. I'm excited to walkthrough that with you then.

<div style="text-align: center;">*--- Access to information ---*</div>

<div style="text-align: center;">BROOKE</div>

28:52  But what we're gonna do first is we are gonna take a look at the office view of service trade. From there, we'll jump out into the field. And then afterwards we'll jump into some of the customer facing view. So what we see here and we can all see this right service dashboard. Yup... yup.

<div style="text-align: center;">*--- Access to information ends ---*</div>

<div style="text-align: center;">TRAVIS</div>

29:10  So, can you see that?

<div style="text-align: center;">TRAVIS</div>

29:16  Emailed until we move on with all of them?

<div style="text-align: center;">2 JARED WILKE 8U</div>

29:20  Yeah.

<div style="text-align: center;">BROOKE</div>

29:21  Yep. So Jared, I assume you would be the one managed service straight from the office as the service manager, or would that be someone else?

<div style="text-align: center;">2 JARED WILKE 8U</div>

29:29  We're looking at higher to admin person. But yeah, I'd be overseeing it.

<div style="text-align: center;">BROOKE</div>

29:33  Okay. Perfect. Well, whoever it may be, this might be where they start their day and maintain their... their day as it's happening. So they'll have access to the data schedule. They can see the type of work we're going to do, the technicians on the job and where they're headed as well as how complete these jobs are. They'll be able to see overdo jobs, thought appointments. So, these are jobs that we've told the system needs to be completed by X state. We're past X date and this is a system letting us know like, hey, these were supposed to be done by now. Let's... let's fix this before our customer notices jobs about appointments, do the next two weeks. So, same idea. It's a nudge on the shoulder. We've told the system that need, these needs to be do by the state for two weeks out. We still haven't scheduled it out and then pass jobs to be marked complete. So this means the work has been done by the tech, they marked as complete. But checks and balances, we wanna make sure the office takes a second glance at what as well just to make sure nothing important was missed. You'll see these flags here. These represent deficiencies. And so I can look at... at these jobs, no, that there's a deficiency there, and that might prompt you to check on the progress of the quote or something along those lines because I have that visual queue. And then

down at the bottom here are probably the most important bucket on the dashboard, completed jobs to be invoiced. This means the work is complete, the... the text marked it off. The office approved it. And really all you need to do is send out your Bill and collect your payment... on the.

*--- Invoicing ---*

TRAVIS

30:56 And...

BROOKE

30:57 I had.

TRAVIS

30:57 Question about that. Let's say we send out our invoice. Okay. Can we take credit card payments on... this and apply it to it as well?

BROOKE

31:09 Yes, you can take credit card payments through service trade.

TRAVIS

31:12 Okay.

BROOKE

31:13 Yep. I'm on the right here, we have our clock events.

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

BROOKE

31:17 So in service trade, we can track time in three ways that's in route. So driving to a job onsite acting on a job and then job preparation, of course. So the dashboard will snapshot clock events. So at a quick glance, you can see who might be available to go to an incoming service call.

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

BROOKE

31:35 You know, Danny is probably not available because he just clocked in an hour ago. That kind of idea. So the dashboard here, it's... it's very high level overview of the day and maintaining the day, every bucket here, there's a deeper way to dive into it. But at a first glance, where do you see this... this being helpful for you all?

TRAVIS

31:56 Just have an overview and see what's going on because we don't have every now. I mean there's more information than we've ever had, which... I liked the dashboard because you can see everything happening in live. Yeah, and jobs that are being worked on or going to be close though, you know, all throughout the day. So a little bit of accountability as well.

*--- Paper process ---*

BROOKE

32:23 Okay. Okay. So vital information increase accountability is what the dashboard is going to provide you here.

TRAVIS

32:31 And then even the invoicing portion of it too, you know, because we just do that right now off of an excel sheet weekly that we get. I mean this could improve cashable considerably.

*--- Paper process ends ---*

BROOKE

32:44 Yep. Yep. And that's what our intention is... is to pay for ourselves and to make you money... cool. So over here, we have our dispatch board. Dispatch boards are pretty universal. But just so you understand how ours works. So you would have your offices, and then in each office, you'd have your designated technicians per office. So we call this the swim Lane is where you can see the work they're doing. This line travels in real time. And so most people use the dispatch board for something along the lines of like an emergency service, call company calls in. You go to the dispatch board. You see that whoever is available and you can see that tends available here that will add job. And so long as there's contact information, it will all autofill. And so Travis I put you in for today and you'll just mentioned why they're calling, say it's an emergency. They'll say you need to get out here today, we'll say we can get out there by two o'clock describe.

*--- Assets ---*

BROOKE

33:43 The problems are usually something that's broken, tie it back to the correct piece of equipment. If the correct piece of equipment is isn't in there, the one that they're calling about, you can always tie it back to the building as a default. I'm gonna just say that one of our cameras is broken.

*--- Dispatch ---*

BROOKE

34:00 Let's say Texas for troubleshoot... if you take orders and what you can do here is you can either assign it to the technician if you know who's available or you don't need to assign it and you can put it in an assigned to happen and drag and drop it. But since I know Tim's available, I'm gonna give it to him.

## TRAVIS

34:20 Let's say we can't get there for a day or two dependent on our current service call list. Let's say it's following day. Do you just schedule it for the following day then, and leave it on assigned. If you don't know who's gonna do?

## BROOKE

34:33 Yeah, you can scheduled for the following day, there's a bunch of different ways that you can schedule than service trade. The example I'm giving here is assuming that we're able to get out same day. There's... there's other means of scheduling for, you know, to... to do, you know, weeks out that I would that I would recommend using a different avenue service straightforward?

## TRAVIS

34:55 So once... once a dispatcher, does this canvas tech change any of those scheduling on it or is it only done by the dispatcher?

## BROOKE

35:06 That's all permissions based. You can give your technicians permissions to adjust their schedule. But in most cases, we have the dispatcher designate that. And so when I assign this job to Tim, what happened was he got an email letting them know an appointment was added to a schedule. And from here, you can always click into the work order, click into the details and reschedule it. It's also a drag and drop. And so if Tim turns out, he's not available and I want to give it to Brooke, I can take it up here. I can also expand the job, make it longer, you know, so on and so forth.

*--- Paper process ---*

## TRAVIS

35:39 I got a question on the email. A lot of the guys in the field, they're not checking their phones constantly because they already are working on the call that they are. Is there any option of having that text it to them? So let's say you get a pile emails and don't have to scan them.

*--- Paper process ends ---*

## BROOKE

35:55 The notifications are sent through email. You're just gonna have to have them have their email notifications on, but it's also going to show up on their service straight application.

## TRAVIS

36:03 Okay. Yeah.

## BROOKE

36:07 Cool. Any questions on the dashboard?

TRAVIS

36:10  No, it's just that I liked the visibility.

BROOKE

36:13  Perfect. And then one thing I thought would be really helpful for you all as you are doing a lot of maintenance and that is your focus.

--- *Recurring maintenance* ---

BROOKE

36:20  Is this tool here. It's called service opportunities. This is where you can run a report of either your overdue or upcoming jobs by a specific date range. So for example, if I want to know all of my jobs that are due next month and I still need to schedule out, I can run that report and given the quantity, I can start building war quarters one at a time or I can bulk create them. And so we'll let this populate for a second here.

--- *Pricing* ---

TRAVIS

36:44  When you say bulk create, so, let's say we're forecasting next month service PMS, and we're trying to justify or see how many hours that are booked belt for next month. And okay, let's say we're 70 percent or 50 percent. And then let's say the rest of it's been views for 50 percent, service calls, deficiency, repairs or installs.

--- *Recurring maintenance* ---

BROOKE

37:10  Yeah. So what I mean by this is alright. So this is all of our services do for the next two months. Given the quantity, you can go ahead and create these work orders one at a time, assign them to your technician, schedule them out. But let's say you've got 50 jobs, do you next month?

--- *Dispatch* ---

BROOKE

37:26  And we don't want to click through all of them one at a time. What our customers do is they will bulk create them... and what they'll do is they'll glaze over assigning them and scheduling them and they'll have them fall onto our scheduling map here as great pins as approach. And so... we'll see that there's a few mine because someone hit mind there's... there's some back there. Those are great pin. So those are jobs that have been created but not assigned or scheduled. And so what you'll do is when you know who you want to send. So this, we can see the service. Call it Russell county medical center. Who needs to go there? When, you know, who needs to go there? It's a simple drag and drop. So drag this over to my name. And then when I know when I want to send Brooke, it's a drag to her calendar to schedule, it. Does that make sense?

TRAVIS

38:18  Yup.

BROOKE

38:19  Yep. So if you were to create all of these, they would fall into that map as those great pins. And then you would click and drag and drop. Does that seem like it would work for you?

TRAVIS

38:29  Yup.

BROOKE

38:30  Yup. And then this is another avenue of scheduling kind of breezed over here. But these are your technicians, of course, they're color coded company use this method as a way to schedule in a way that's that makes geographical sense because of course, you'd be zoomed into your area of service. And so you would schedule the... the right pins in the right location, given their color. Of course, you see this right here. It says one on the top two in the bottom, that means one day job, two technicians. And then... let me try to find one. Like if it was just let's say this was just ride with no calendar. That just means it's assigned but not scheduled. So that all making sense? No... yeah, this might be where you go to schedule a couple of days out a couple of weeks out because you'll have that visibility there.

TRAVIS

39:20  Hello, this is Jared night. No stuff changes daily, independent service, call, volume and stuff too.

BROOKE

39:26  Yeah. Yeah. Exactly. Cool. Any questions here?

2 JARED WILKE 8U

39:32  No.

BROOKE

39:35  And back on this page, do you see this being beneficial to you all to have this... this tool to visualize what's upcoming and what's perhaps overdo?

TRAVIS

39:48  So the little icons on the right, the fan and what does that mean?

BROOKE

39:54  Those are just a visual cues at the type of work it would be.

*--- Recurring maintenance ---*

## BROOKE

39:57 So that's like an H fact that's refrigeration, you would only have the icons that apply to your... your scope before our call. Yep. Cool. And so, since you guys are commercial industrial, one thing I wanted to touch on is kind of how we organize our customers data. I am assuming and correct me if I'm wrong, that are most of your customers have somewhat of a parent child relationship, think of something like and I hop main headquarters, multiple locations that you service. Is that the case? Yep. So an example of this would be, or I hop here? This is our main headquarters. Under this headquarters. We service these five locations and each location it's going to give us that data that we need to keep track of, including the services, the assets, the jobs per each location. Okay. Any questions there?

## TRAVIS

40:43 No, I'm familiar with that.

## BROOKE

40:45 Perfect. So on that note here is an example of an, I hope that we service just one single location and this is gonna tell us all that important information we need... need to now. So the... the contact, the address, the services that we perform with this site, how often they're set to record the preferred technicians, you know, estimated time price description, all that fun stuff. If I click to the right here, we can see that the calendar populates when it's next to for us. So I actually set us up for... for this H, back maintenance today.

## BROOKE

41:22 Can you can see that they populate according to how you... you set it up? So that could be quarterly, semi annually, weekly, monthly, whatever you need it to be.

--- *Assets* ---

## BROOKE

41:30 We can... we can accommodate that. Also on the location, we can see all of our jobs tied to the site. And so it looks like we've done 53 jobs here. This is helpful to you because, you know, the customer calls back with the question. Odds are they're calling about the most recent visit? You go to the most recent visit, click into that job number, pull up that post service report, take a look at what happened and have a more valuable conversation with them. That way. I know that job history was important to you. What's kind of the motivation there to... to want to access that a little bit easier?

## TRAVIS

42:07 No. What we worked on in the past, is it a recurring a call? Is it something that only happens every three months? You know, on the same piece of equipment because right now we, the customer could Dallas and we have no way to track it. Yeah. Are there certain times of the year that we're having issues with equipment? You know, there's a lot of things that factor into it, but just seeing the history.

## BROOKE

42:32 Yeah. Yeah. So I'm I know of tracking equipment to you'll. Have your customers assets and the system. So assets relates to the piece of equipment. And then within each asset, you can take a deeper dive into deficiencies hasn't broken before of what services and jobs are completed on it. So for example, this H back unit that we're going to work on today, I can click into the unit and it takes me to this details page and I can see that 15 jobs have been for performed on it. Six deficiencies have been found. And so to your point, noting patterns, using those patterns to make the best recommendation. You'll have very... very simple access to that within service trade.

TRAVIS

43:15 That is valuable.

BROOKE

43:17 Yeah. Was that what you're hoping to see along the lines of equipment tracking?

TRAVIS

43:22 Yes. Can this be exported to... to show proof to a customer as well? I mean can we, the multiple issues look one piece of equipment? Can you export that word excel and show the customer? This is what we have.

BROOKE

43:39 Yeah, there's a few ways to send those reports to your customers. But yeah, you can export through service trade. There's two ways to get that information to them. Perfect. And so back in, we can also track deficiencies per location, quotes, contracts, comments attachments... attachments could be something along the lines of like a site map, equipment manual, anything to help your technician at this specific job site.

--- *Assets ends* ---

BROOKE

44:08 So in terms of how you get your customers to be organized, the way you'd like them to be set up. Of course, do you see this working for you all in... in your service?

TRAVIS

44:19 Yeah, because right now we have nothing. So this is what void better than what we currently have.

--- *Assets* ---

BROOKE

44:26 Perfect. Where we're on this page, do you... do you see the most benefit?

2 JARED WILKE 8U

44:33 All of?

TRAVIS

44:34 Yeah. I mean, there's not one piece of it the from the, you have everything
housed together from recurring invoice as the jobs, the assets efficiencies are nice
and also the quotes, but even your contracts all tied into it at once and then you can
put as many attachments or even the comments so you can track stuff during the
duration of through that one customer.

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

BROOKE

44:57 Yeah, exactly. Cool. So what I did for us today is I noticed we had an H back
service do. So I went ahead and set this up. A job over here is the work order from
the offices perspective on this war quarter. I can see that it's scheduled for this date
and time.

*--- Recurring maintenance ---*

BROOKE

45:15 I can see my description. One thing to note is when you're onboarding with
service trade will be setting up the services. And once you set them up one time, the
description, the parts labor and items, the estimated duration, all of that pulls in
automatically when you create the work order is tied to those services.

*--- Quote templates ---*

BROOKE

45:32 So all of this information I didn't need to type out any of it. Same with like the
parts labor and items down here, it pulled in for me because I had those services
setup.

TRAVIS

45:42 So that's something we have to build a head of time with refrigerant. So when it
gets charged out that... that it hits this work order.

*--- Quote templates ends ---*

BROOKE

45:50 Yep. So that's part of the onboarding process to is getting those services into the
system. That way when you guys are ready to start running jobs, I'm creating work
orders, all the information's in there for you.

TRAVIS

46:00 Okay. And then how does the, where it says asset to service?

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

TRAVIS

46:06  It says kitchen Florida three days. And that number behind Diane. Is that an asset number or is that the work order number?

BROOKE

46:12  That's an asset number?

TRAVIS

46:14  Okay. So where's the work order generated on here? Okay. And then does that work with Quickbooks? So they can... tie that in? I guess, yeah, maybe we'll get to that down the road here a little bit.

*--- Invoicing ---*

BROOKE

46:31  Yep. So I have a few resources I'm going to send you about Quickbooks after our meeting today, one of which is how the data is set up. Basically you'll select either service trade or Quickbooks as your record of truth, who designate the work order number? We always recommend having service trade do that so that service can live in service trade, accounting can limit. I'll send you a whole document on how that setup and that should clear up a lot of your questions.

*--- Invoicing ends ---*

TRAVIS

46:53  Okay. Now, because like I said, I don't want our controller account and setting up job numbers. And I'll send this is generating on then I can see that being a mess, but.

BROOKE

47:03  Okay. Yup. That won't be a problem. Okay? It's all about how you set it up. Okay?

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

BROOKE

47:10  And then also on the work order, we can start tracking our progress as we go out to the field into our jobs, so we can see our clock events, deficiencies, comments, attachments, all of that fun stuff in real time as it's happening. Cool. Any questions on the work order before we jump out into the field?

*--- Access to information ---*

TRAVIS

47:28  No.

BROOKE

47:29 Okay, cool. So what I'm gonna do here is I'm gonna, I guess I should let me join our meeting real quick. My iPad?

BROOKE

47:46 Okay. Here. And then we shouldn't see service trade pop up in a few seconds here.

TRAVIS

47:53 I can help you fine.

BROOKE

47:56 Alrighty. Can we see where it says? Appointments apple upper east side? I have. Yep. So this is the mobile view of service trade. I'll act as your technician.

*--- Dispatch ---*

BROOKE

48:06 Well, the first thing that I'm going to see when I log into my ap is my appointments for the day. I can also see any unscheduled appointments assigned to me. And I can see my completed jobs. That way. You know, if I'm driving down the road, my customer calls back with the question, maybe Texas roadhouse calls me and they need to... to asked me to follow up question on a piece of equipment.

*--- Dispatch ends ---*

BROOKE

48:25 I can go ahead and take a look at what I did, you know, access the information. I have a... have a better conversation with them that way.

BROOKE

48:37 But let's go ahead and focus on this. I have job. So clicking into the work order, the purpose of this is it should be really easy for your technicians to navigate and it should give them the resources they need to do their work at the best service possible. So I can click in. I can see that I'm here to do this service. I can see it's gonna take this amount of time. I can see any.

*--- Deficiencies ---*

TRAVIS

48:59 Comments.

BROOKE

49:00 Any past efficiencies at this location? Attachments, I can take photos, upload photos right now or are you guys doing anything like taking before and after photos?

49:13 We do a new employee, but we got nowhere to start them and then nobody get some, so.

49:18 Okay.

BROOKE

49:19 Will say this is our before and then obviously is let's go.

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

BROOKE

49:26 We'll take a second one as an after. I wish I had something else to photograph, but I just have this fun little lamp... after that will be in the system comp, contact scanning the middle paperwork job items. Really easy for your technicians to go in and add an item and they can add an item, let you know that they got it from a vendor, a warehouse, wherever it may be.

*--- Assets ---*

BROOKE

49:48 Assets down at the bottom here, they have full access to the asset history. So they can say, okay, we're working on as H back unit. What happened before they'll click into it? Access. The service history. Looks like the last time we were here was on the ninth. They have access to that work order.

*--- Deficiencies ---*

BROOKE

50:03 They can see that Brooke was here. She added these photos, she reported these deficiencies, you know, so on. And so forth is basically gives me context to do my work the best level possible. Do you think that would help your technicians?

TRAVIS

50:20 Yes.

2 JARED WILKE 8U

50:20 Yup. Yup.

BROOKE

50:23 That's not something you guys have access to now, right?

*--- Assets ---*

50:26 No.

BROOKE

50:28 Okay. Really easy to add assets into. If you get there, there's a new piece of equipment that's... that's simple to do as far as signatures go. Are you guys getting signatures out in the field?

2 JARED WILKE 8U

50:40 So, let's go back to that asset thing. So, after the text on site and they add the asset and doesn't uploaded, do it automatically and as part of the day.

BROOKE

50:50 It does, so, if they add an asset from a job site that will save to the location. So they only need to put it in one and it's there and definitely.

2 JARED WILKE 8U

50:58 Cumbersome as it to do, I'm an app on the text side of things. Is it or is it on a computer?

BROOKE

51:08 I wouldn't say it's cumbersome on either view. It's pretty... pretty self explanatory. So let's just go ahead and add something in. So, C, H vac, motor, you'll have these... fields populate for you and you'll have to go in and fill it out. Of course... they'll just go through, none of them are required. So it's just the information that they have access to?

2 JARED WILKE 8U

51:32 So, can you take a picture of the model number? Say on like the tag of it that has the model solely serial number and all that tag that they assets, right? Or do you guys type of man... man?

BROOKE

51:43 Are you talking about like barcode scanning?

2 JARED WILKE 8U

51:46 That or even just a picture of like I know on our makeup errors or rooftops or anything that has the model serial voltage, refrigerant charge all that, and you can snap a picture of that, tag it to the asset side and we don't have any of that model and serial number and Jeremy.

*--- Tech time tracking ---*

TRAVIS

52:06 To get man manually entered, even if we had a barcode on it, we'd still have to manually enter this information. But once you want up to and scanned it and it would pull up, I'm assuming pull right up. Is that correct Brooke?

BROOKE

52:19 In service rates for you're, gonna have to put this information manually one time minutes there to stay.

--- *Forms* ---

BROOKE

52:25 We have another product called service forms which is basically like inspection reports on steroids, for you can do what you're talking about, take a photo or Barcode Scanner... but it... it could be something valuable to you guys especially since you guys are looking to start on premium. But in service rates quarter, you're gonna have to type it in one time and then it's there to stay.

--- *Deficiencies* ---

TRAVIS

52:48 Basically what I'd say Jared is if the guys can get it, attach the photo to it, our admin slash dispatcher could go through and clean it up.

BROOKE

52:56 Yeah, because what they can do is you're completely right? They can go to attachments, take a photo of... of the tab. Yeah, you can have an office person update that information in the system. Yep. Cool. Did that answer your question?

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

2 JARED WILKE 8U

53:13 Yup.

BROOKE

53:15 And then on the bottom here, I always forget to... to talk about these clock events. Of course. So onsite and route, job prep and routes, where you can send an eta time to your customers, letting them know that, hey, we'll be here in 45 minutes here's. Brooks photo that's how you can expect at the door. It's something small but it's something that really sets the standard, you know, providing that level of information to your customer, but I'll go ahead and clock in on site and back to my question about signatures. Do you guys collect signatures and the field, be it before or after our service?

TRAVIS

53:50 No.

53:50 Hello. Hello is required and some don't so we're kind of we send a paper copy to him after they sign it and then they have it for their records to attach their bills.

BROOKE

54:02 Okay. Well, the good news for you is that it's here if you need it, but it's not going to stop you from completing your work. So just as a quick example, let's say we were getting a signature before the work is done, you just go and select your contact. Let them know. Hey, Travis. We're here to do this work. We might find efficiencies in which case we'll hook them up for you. These are the items we plan to use for this service.

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

BROOKE

54:25 Will have him review it. You'll have your terms and conditions, and he can authorize this work. I'm gonna forward your signature here, so.

TRAVIS

54:35 Can, can you set that up that we require signatures? The only reason I'm asking is sometimes that makes it easier when we're trying to invoice created to you.

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

TRAVIS

54:44 And I'm we're a quarter or something for a customer and be like, hey, you guys actually signed for it. We were on site. I do have proof that we were there and you approve the work.

BROOKE

54:55 Yeah. So, and service strengths, core application, you can't require them, but that's something like interview you can require, which is why we have that the checks and balances of having the office sign off on the work as well after the check marks it as.

*--- Forms ---*

BROOKE

55:11 But we also don't want to... to have any too many roles in the system where let's say there was a bug that they couldn't continue with their work. If there's a pop up that says you need to get a second. It's more internal process that you will mandate. Yup. And it sounds like you guys were asking about like tasking checklist maintenance as forms, all that fun stuff.

TRAVIS

55:35 Yes.

BROOKE

55:36 What happens in service trade is you've got a few options. We can either do syllable PDF, I'm in which case, you would give us your forms that you have, and we would turn them into these... these aren't shown here. What I'm showing here are just my example demo forms. But what your tax would do is they would generate these forms, open them and Adobe acrobat... sign right on the work order. And of course, my Adobe lock me out.

TRAVIS

56:08 That's all right.

BROOKE

56:10 I don't know my password off the top of my head, but essentially, what would happen is there will be a button here that says billing side and they could check the boxes digitally and save it right to their work order right now. Are these forms being completed on paper like pen and paper and carry back to the office?

TRAVIS

56:29 Sure.

BROOKE

56:35 Maybe Jared grab a.

2 JARED WILKE 8U

56:36 Snack...

TRAVIS

56:39 He's our he's driving.

BROOKE

56:41 It's okay. Well, regardless however you're doing it now, I'm guessing this would be a step in the right direction. I'm guessing they're doing it more manually. So they would fill out their form, and then they could save it to service trade and save it to the work order.

TRAVIS

56:55 That would be nice.

BROOKE

56:57 Yep. So that's the billable PDF. We also have our product called service forms, which is basically that. But like I said, on steroids, it's we have a partner called device magic and it's rather than, you know, you see me pinching in zooming to fill out the forms. They would have it laid out a little bit cleaner for them. Typically, we recommend customers to start with... with the syllable PDF, get to know those. And

then once those improve your process enough, then we recommend looking at something like the... the service forms. I'll send you information on. It... it could be worth not right off the bat, but it sounds like even so the billable PDF, so I just showed would be... would be an improvement.

                                    TRAVIS

57:37  Yes. So, what did you call it sales?

                                    BROOKE

57:40  Service form?

                                    TRAVIS

57:42  Home service forms?

                                    BROOKE

57:43  Yeah. I'll send you information about it.

                                    TRAVIS

57:45  Okay. Because if we would customize them to per customer, that would be huge.

                              *--- Forms ends ---*

                                    BROOKE

57:52  Yeah, we... we could definitely do that. Yeah, it could we... could. We, it might require another call. I had actually would require another call to look more into it. So after I send you the information, I'll be eager to hear your thoughts. But let's go ahead and see here.

                            *--- Deficiencies ---*

                                    BROOKE

58:10  So we can look at that process. So we're working on a on an H back units. So I'm just gonna say there's a broken fan. It'll ask us to take our photos. There's really no data limit in service trade. So if you guys need to take 100 photos, that's fine, but I'll just take one for today, you know, take videos, record audio memos. The audio on those are helpful because it saves you a phone call to the office. Your technicians can just say, hey, this... this motor is making the sound. I need help from this person. This part rather than tying up the phone lines. Of course here's where we select the severity of the deficiency and operable deficient or suggested back to something you competent earlier, building history for the customer, giving them that report. I'm making the best recommendation. This is what we're doing here. So let's say, you know, we've been here two times before husband deficient, they've chosen not to fix it announcement operable through service trade. We're collecting all that history to present to our customer. We'll tie it back to the... the asset we're working on. And then we'll Mark the deficiency as new. And then we'll add our proposed solution. So I'm gonna say fix let's... so does that seem pretty easy for... for your technicians to navigate and the...

TRAVIS

59:25 Yeah. So it's not cumbersome by any means.

BROOKE

59:27 Yup. Yup. So when I reported this deficiency, what happens is the person in the office or the designated person division, letting them know a deficiency was found and that's really there to... to go into the work order and take a look at the progress, take a look at the issue and quote that out as needed.

*--- Deficiencies ends ---*

TRAVIS

59:46 Deficiencies, let's say they hit five customers throughout the day. There's not a dashboard for all the deficiencies that's per customer... correct the, pull them off the law firm.

BROOKE

59:59 Let me, I can show you that before we go back to the office. So I can show you that. Any other questions on the... on the mobile view?

*--- Paper process ---*

2 JARED WILKE 8U

1:00:06 Hello?

BROOKE

1:00:08 And one question I have for you is for your technicians, where do you see this making the biggest impact?

TRAVIS

1:00:15 Recording data and actually having data and it gets back to the office. The other part is the efficiency side of things already have any information. It's saving a phone call email... you know, that portion of it... there's... there's value to all that... mean we don't have any of that right now. And the streamline things make things faster simpler, easier to use field. Friendly.

BROOKE

1:00:51 Exactly. Cool. Is Jared packet? I'm curious what his thoughts are?

TRAVIS

1:00:57 Jared? Are you there?

BROOKE

1:01:00 Just thought maybe he answered the phone call.

1:01:03  I'll try texting them. Okay. Well, he's been on, is that a lot of service calls a day? Because it's cold and snow on up your?

## 2 JARED WILKE 8U

1:01:14  No problem.

## BROOKE

1:01:15  But what we can do is we can go back to the office and then I'll show you how we're gonna handle quoting invoicing.

*--- Paper process ends ---*

## BROOKE

1:01:20  And then we'll take a look at the portal. Okay? But first let's answer syrup basically asking where you can see your... your open deficiencies... that was your question, right? Okay. So what you can do your, right? They do populate on the work order. But what you can also do is here we can see where it's...

*--- Deficiencies ---*

## 2 JARED WILKE 8U

1:01:49  I know there's a button that says.

## BROOKE

1:01:53  Am I find very used to be something that says there we are? Okay... the efficiencies, and you can sort by different filters, of course, to... to find your pending, the deficiency. Awesome. So... you can sort by severity status. So to answer your question, yes, you can... you can see that information.

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

## TRAVIS

1:02:15  No, I like that. And then to know that they're quoted or, and process or been sent. And then when do they have been sent?

## BROOKE

1:02:22  Yeah, exactly. But back here on the work order, we can go ahead and take a look at the progress that we've made. So we can see that we've clocked in. It looks like we forgot to clock out. That was my doing. We can see the deficiency that we reported. We can see the attachments that we uploaded. So here's that before picture after picture at that pre work acknowledgement with that signature and then that job paperwork that we filled out.

*--- Deficiencies ---*

BROOKE

1:02:49 Of course, this would be your form, but this is just an example. Yup... yup. But let's focus here on this broken fan. So what we'll do here is we'll click into this deficiency report and realize the details provided to quote out as needed. So we can see it's an operable. We can see that she thinks we should fix it. Has this happened before we have access that information as well? It's happened six times before it looks like. So again, we can present all this customer, any quotes, comp comments, the attachments. So here's that picture we took of our broken fan, of course.

--- *Quote templates* ---

BROOKE

1:03:26 And once we review this information now, I know exactly how I need to put this job out. So we'll go to create quote that our expertise... will goes for a quote building page. Is everything making sense so far?

TRAVIS

1:03:43 Yes, yes.

BROOKE

1:03:45 Okay. So on the quote building page, what you can do is when you're onboarding with service trade, you can surface templates are quote templates. I should say let's say you guys are quoting out a maintenance or an installer repair on a regular basis. Definitely throw a template into service trade. It makes your life easier. So for example, broken Van replacement. I can automatically pull in my description and my parts labor an items because I had that template in there. Of course, all of this, you can edit and adjust if they're special verbiage, but it saves you that typing time and let you get your quotes out a little bit faster.

TRAVIS

1:04:21 No, this all makes sense. This is similar to what like I said in my past life?

BROOKE

1:04:27 Just...

TRAVIS

1:04:27 Different view layout, but yup... yup.

BROOKE

1:04:31 Yeah. Then we have our gross margin of course, and then you'll have a... we way on how you present the pricing. So typically, would you guys present the total is a grand total? Would you do line items? What's... what's the?

TRAVIS

1:04:47 Depends on the customer. What they holiday want, it broken out 90 percent in time. It's grand.

BROOKE

1:04:52 Okay. Well, the good news here is that you don't need to pick one for every customer. You can choose it. And then any comments, you know, the attachments that we leave, I'll leave an example comment here. I'm just so we can see how it populates.

TRAVIS

1:05:10 Your labor rates and stuff like that for us. Is that fixes that adjustable and is the gross margin? Is that adjustable?

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

BROOKE

1:05:18 Yeah. So that's part of the onboarding as well. So getting your parts, labor and items into the system with your expected cost and margins is all part of the account set up. The numbers here, completely pretend. Yeah.

TRAVIS

1:05:31 So what happens when a call or text needs to go be a pull appeal on a service call and get equipment put into it. So they get the po on the part cost 200 bucks. Yep. Can you manually add that? Yes?

BROOKE

1:05:46 Hi, I'm not from the field under job items. They would add the item. They would document the source where the item came from being a vendor, Vienna, warehouse and truck, and they can enter a po number as well. And so the offices. Yep. So once this quote looks ready to go, we can go ahead and send it to our customer. Travis, do you have access to your email right now?

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

TRAVIS

1:06:07 I do so. Does this go out as a word and converted to a PDF or how does that work?

BROOKE

1:06:14 Let me show you. So I'll send that your way and then often here. And so this is what your customer would see as far as a quote from service trade. They would have your logo, not our cute little aardvark, your name, they would have the description of the work, the services you're proposing that you complete any attachments you added, you know, pictures, videos, audio memos, pricing as you wish to present it be a grand total line items. However it may be your t's and c's here and any comments you wish to leave. But the real benefit to the service trade quote is these two buttons. We have approved request changes. So with service trade, your tech, not your tax,

your customers can go in and improve the quote with the click of a button, enter their po number. The value here is that you're not asking them to take the time another day to email you back or give you a phone call. All they need to do is review and click a button and then request changes as helpful to you because rather than a big red X reject button, let's say, you know, they have an issue with the price or it doesn't look broken to them or something along those lines rather than reject, they're gonna have to tell you what questions they have on the.

TRAVIS

1:07:24 So there was looking to see this full document with the approver or request or is this through the portal?

BROOKE

1:07:31 So they can access it. Okay. So in the example I'm showing here is we're sending it out from service trade, I sent it to your email, so go ahead and open it... and they can go ahead and approve it from there. But they also have access to this from the portal. Yep. Yeah, go ahead and open it. Take a look and then go through the approval process just because I wanna make sure it seems easy for your customers.

TRAVIS

1:07:54 What we'll get caught and spam or anything like that?

*--- Quoting ---*

BROOKE

1:07:57 No, not typically... but they'll have access to it from the portal as well.

TRAVIS

1:08:05 Okay.

BROOKE

1:08:07 Yeah. So let me know when you approved that you can also set up notifications to be notified either when like they opened it or when they approved it so that you can say on top of all of your quote.

TRAVIS

1:08:24 Just approved it.

BROOKE

1:08:26 Cool. So we'll see it go from.

TRAVIS

1:08:29 Pending.

BROOKE

1:08:29 To approved here and then back end service state itself... to approved.

TRAVIS

1:08:38 So this is kind of eliminating this, the sales guy... I'm somewhat following up because they'll know. I mean it's you get it right now?

2 JARED WILKE 8U

1:08:50 Yeah.

TRAVIS

1:08:51 Response.

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

BROOKE

1:08:53 Yeah, but on the notifying up and I'll get there in just a second. But before we move on, I wanted to hear your thoughts on the layout of this quote, how easy it was for you to approve it and what you think your customers would think of something like this?

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

TRAVIS

1:09:06 I think what we're doing now, it takes us 15 to have 15 minutes. So half an hour because we're actually creating it on a word, doc turn it into a PDF, getting all the pricing and labor and pulling that off an excel sheet where this is all housed in one spot. I mean, it didn't take long at all the generate this.

*--- Quoting ---*

BROOKE

1:09:27 Okay. So you're seeing an improvement?

TRAVIS

1:09:30 Correct.

BROOKE

1:09:32 And it was pretty easy for you to go in and approve that.

TRAVIS

1:09:35 Yeah, I mean, all the right up you just go on and do it.

BROOKE

1:09:40 Yep. Cool. And so on the note of I'm tracking pending quotes, looking at history, what you can do here is you can see the history of the quote in terms of, I can see when I sent it to you, compare to when you first looked at it, compare to when you're approved it. So this gives you great context clues for your customers on who to follow up within one. Because, you know, if Travis looks at my quote one time and you never gets back to me, he probably has looked at it and forgot about it. I might give them a quick call, say, hey, did you see the quote?

*--- Quoting ends ---*

BROOKE

1:10:07 If you're looking at my ball every day for 10 days and never getting back to me, that kind of tells me you're really busy figure skating about it. They're never going to know that, you know, how often they see it, but it's... it's a quick little sneaky tool for you to use.

*--- Quoting ---*

TRAVIS

1:10:19 I actually liked that because we, I have a couple of customers that are extremely busy and days and I know they read the emails but they get pulled in a different direction.

BROOKE

1:10:28 Yeah, exactly. And on that note as well, we make it really easy for you to track your pending quotes. So to your point, you have customers that look at their emails and get pulled in different directions. You can run reports of your pending quotes. Let's say you want to know all of your quotes that have been submitted and looked at base customer, but they haven't responded yet. You can run that report and it's gonna populate all of them for you. So you can quickly get them back to the top of their inbox and maybe resend them out once or twice... a lot of times. And I think you'd agree with this. It's people get busy. They just, you know, the glass in an email and I forget they'll forget to go back to it. It's not that they're trying to ignore you. And so we wanna make it as easy as possible for both of you to visualize what's still pending and... and how you can increase that quote approval rate.

*--- Quoting ends ---*

TRAVIS

1:11:17 I mean, right now, we have no way of tracking... once this quotes come up unless I put calendar reminders, you know, on my outlook and be like, alright, follow up next week or follow up in three days to... to they get it, not get it. Didn't...

BROOKE

1:11:32 Yeah.

TRAVIS

1:11:33 The whole thing. Are we moving forward with that? What's going on?

*--- Quoting ---*

BROOKE

1:11:36 Yeah, you can track and we want to make that are really easy process to follow. That way you guys can get more quotes approved and go out and... and complete more work opportunity.

TRAVIS

1:11:48 I do like that. I mean, but like I said, my past life inefficiency quotes, I bet chat and an hour I could pump anyway are dependent on how big or small they work, I can do anywhere from 10 to 25 easily... and take phone calls in between. And... with all the other noise that's going on for all today.

BROOKE

1:12:13 That's awesome. That's our goal for you to... cool. And so from the quote, we have it approved now, you can either add it to our existing job. So that's the example where, hey, like same day, maybe Brooke doesn't have a lot of work to do. She can go back to the job site into that repair.

*--- Quote templates ---*

BROOKE

1:12:29 Other times we want to create a new work order. So really up to you depending on the... the situation for today's, example, I'm gonna add it back to our job that we were working on. And then I'll dispatch those quote details and that repaired. So Brooke, does that make sense?

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

TRAVIS

1:12:45 Those make sense?

BROOKE

1:12:49 So, for the sake of time today, I'm gonna go ahead and pretend like we went back out in the field, we completed our repair, we fix the fan and we can go ahead and complete that job and create our invoice.

2 JARED WILKE 8U

1:13:06 And let me back out here. There we go.

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

TRAVIS

1:13:09 Broke it. Just an fyi at 12 30. I gotta jump on a phone call.

BROOKE

1:13:13 Okay. That's perfect because I do too.

TRAVIS

1:13:15 Okay.

BROOKE

1:13:16 15.

TRAVIS

1:13:16 Minutes, yes.

BROOKE

1:13:18 Okay. I can definitely be done by then. So we'll go ahead and create our invoice. We'll see service trade tells us our margin.

*--- Quote templates ---*

BROOKE

1:13:27 It's taking it. There we go. So we can have our margin, make sure all of this looks nice and proper, and then designate how we present our pricing. So for invoicing to, is it usually a grand total?

TRAVIS

1:13:41 Depends on per customer or someone that's line item. Okay. See a line item one broken out?

BROOKE

1:13:45 Yeah, we'll do line items with prices.

BROOKE

1:13:52 Make sure all of this look standard. And then we'll go ahead and send our invoice to our customer wants it looks ready to go.

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

BROOKE

1:14:07 And so, for our customer, what they're gonna see when they invoice or when you invoice and service trade is, you know, your logo, your name, they'll have to pay now button. They can pay through credit card or AC H within the system. And then they'll have pricing as you wish to presented with their grand total. But let's say I'm your customer. And I'm wondering what the heck am I paying nearly 1,400 dollars

for this is where that button comes into the go to service details. And this pulls up service report, our service link. The purpose of our service link is to outline the great work we did for a customer. That way it... it increases their competence, not only and paying or 1,400 dollars Bill, but also utilizing us as our provider because of the information we're getting them. So they can see that we completed this PM, we came back me fix their fan. If you'd like to include things like the comments to the park Claiborne items.

*--- Forms ---*

## BROOKE

1:14:56 You can completely permissions based on all of this, they can see their file. So here's that pre work form that I signed your site inspection farm or checklist form before after the efficiency photo and here's that fixed efficiency. So upon reviewing this information, I go. Well, hey, now, it makes sense that I'm paying 1,400 dollars for this.

*--- Forms ends ---*

## TRAVIS

1:15:20 No, I, that the more description, the more information that the customers, it's easier from. So all the...

## BROOKE

1:15:26 Yup. Yup. I know that a post service report was very... very... very key to you and choosing a software. Is this what you were hoping to see?

## TRAVIS

1:15:38 Yes. Yeah. This is very, like I said in my past life, this is very similar. Just a different... I'll book or how you view everything is different. But no, this is, I mean with us not have on anything right now, this is huge.

## 2 JARED WILKE 8U

1:15:57 Yeah. Yeah. I think that's the biggest thing that we lack is we kind of do everything here and not here in there. We try to compile everything together and we mash stuff and it just turns into a nightmare of trying to track stuff.

## BROOKE

1:16:14 Yep. So this... this level of information would be helpful to both you and the customer to... to avoid those... those types of situations?

## TRAVIS

1:16:21 Correct. And like I said, we're... we're trying to find some overall for the company, but we're specifically trying to just take care of our service side of it and get more revenue audit because right now we're not... and this is a good fit for us as well.

*--- Type of work ---*

BROOKE

1:16:38 Yup. Yup. And that's why I wanted us today to focus on the service side because that's definitely what.

--- *Customer engagement* ---

2 JARED WILKE 8U

1:16:44 As...

BROOKE

1:16:44 You can see as we walkthrough this, what we're built for, one last thing I wanted to touch on is that portal. It's pretty self explanatory here's. An example of it. Your customers will be able to be able to log into the portal from your website. In order to access the portal. You guys have to have a Wordpress website. Do you know if that's the type you have?

TRAVIS

1:17:04 What did you say word? What?

BROOKE

1:17:05 Wordpress?

TRAVIS

1:17:07 We do not.

BROOKE

1:17:08 Okay. So that may be something we need to table there's. Other ways to build it out. It's just gonna be a little bit more expensive if it's not hosted by Wordpress. And so... we can definitely talk about that.

--- *Customer engagement ends* ---

BROOKE

1:17:21 Some people start on premium regardless. Is there other functions, the premium that you would, that you would use like sub contractors?

TRAVIS

1:17:28 Yes. I mean, we'd have electrical that would be tied into some of the stuff because a lot of our customers, they want a one stop shop and just get it taken care of or if it's a roofing lead, where were you?

--- *Customer engagement* ---

TRAVIS

1:17:41 Let's say we quoted something to change out a furnace, an air conditioner, rooftop, whatever they want that included on that as well. So there's a lot of value that, okay?

BROOKE

1:17:54 I'll... I'll get the details of how we work with companies that don't utilize Wordpress in terms of how we build out the portal for you. But here it is so they can see their upcoming jobs. They're jobs for today. Any recently completed jobs. They are also have access to their individual locations that you service equipment that you service for them. They can follow up on their pending deficiencies in quotes, approve, quotes, you know, pay invoices all that. And they can also request service.

*--- Pricing ---*

TRAVIS

1:18:24 So, I'll look into the Wordpress software. Yeah. What's cost on this? Is it per, is it overall software? Is that price per field tech for office user?

BROOKE

1:18:35 Yeah. So.

2 JARED WILKE 8U

1:18:37 Well, let me...

2 JARED WILKE 8U

1:18:42 So, what I...

TRAVIS

1:18:43 What I'm...

BROOKE

1:18:44 Recommending for you guys and just based on kind of what we went through today, I definitely think premium makes sense for you guys in terms of like service farms.

*--- Forms ---*

BROOKE

1:18:52 I'm happy to send you information, but we kind of have a concept here of like walk crawl run. It sounds like with forums right now, you guys are walking on more of a manual paper process. Let's have you crawl with the syllable PDF first and then let's have you run with service forms down the road.

*--- Forms ends ---*

BROOKE

1:19:08 Are you there? Software changes can be overwhelming task at times and we...
we don't want people to take on too much at one time.

TRAVIS

1:19:18 Correct.

BROOKE

1:19:18 Does that make?

TRAVIS

1:19:19 Hi, I'm totally on board. We're about.

BROOKE

1:19:21 Okay. So I'll send you the information about it as a preview, but it's probably
gonna be something that should you choose to go with us, you upgrade to down the
road service?

*--- Pricing ---*

TRAVIS

1:19:28 Correct. I'd probably be six months, nine months to a year because it's get our
feet wet.

BROOKE

1:19:34 Yeah, exactly. Okay. So in terms of, I guess it's kinda, we kinda need to figure
out who would be using service trade for you guys right off the bat. And so, are you
thinking you would want to use, I need to send you information about pro core to our
partner for construction. So should we just quote out like a higher number? Like let's
say like 15 users?

*--- Access to information ---*

TRAVIS

1:20:00 Yeah.

BROOKE

1:20:01 Okay. And let me.

TRAVIS

1:20:05 Does that include field and office staff?

BROOKE

1:20:08 So, I'm sorry to answer your question. We charge per mobile technician. What I was trying to figure out for you guys is who would be using service trade from a service standpoint? Because if you guys aren't gonna use us for construction, you're using something else and I don't want to overload you, but.

*--- Pricing ---*

TRAVIS

1:20:23 Let's say let's figure 15 for the field office, one two three four figure five off top bad right now for office.

BROOKE

1:20:34 Yep. So office users, an admin are completely free and unlimited and those 15 users in the field, those are all full-time workers. Yup. Okay. And then for the training for the forms on those billable PDF, what you can do is you can either have us put those forms in for you. We charge 149 dollars per syllable page. So some companies come to us and go, we have 30 pages, in which case, I recommend being trained on how to put them in yourself. Typically takes one, two two hours of training at 149 an hour. So usually it's more cost effective to do the training, but some companies just don't want to think about it. They want us to do it. So, what are your thoughts there?

TRAVIS

1:21:16 We're gonna have a ton of PDF. So we'd probably do the one two two hours of training and we'll have over it's going to be for each piece of equipment. So it would probably have 30 at least. Okay?

2 JARED WILKE 8U

1:21:29 I'll put...

BROOKE

1:21:29 You down for the training... but yeah. So for 15 text on premium with the... the two hours of training, and this includes your onboarding total, you are looking at a first year total of 26 part, about 27,000 dollars to get the software setup. And that includes the onboarding training account setup and the subscription fee since year two and beyond. You're not paying for account set up your down to about 21,500.

TRAVIS

1:22:01 Okay. Okay. That's not sticker shock at all. I mean when I was expecting worse than that, okay?

BROOKE

1:22:08 That fits into the budget.

TRAVIS

1:22:10 Default...

1:22:14 And is that a one time? You're right? Sorry?

1:22:19 The one time fee?

1:22:21 21,000 feet.

BROOKE

1:22:22 We Bill annually. So, if your first year would be about 27,000, and then year two and beyond, it would be 21,500 per year, and that covers up to 15 technician.

TRAVIS

1:22:34 Yep.

BROOKE

1:22:35 Hi, I'm for premium, you can think of... if you're adding, you know, 16 and beyond 119 per month protect, but Bill.

2 JARED WILKE 8U

1:22:43 Annually. Okay. And I'll...

BROOKE

1:22:46 That to you in a formal quote just so you can see it broken out nice and clean for you.

TRAVIS

1:22:54 And I'll also send you an...

BROOKE

1:22:56 Go ahead.

TRAVIS

1:22:57 Like I said, you can't put a value on it when it's something you don't have until you have that, and then you'll be like than it's worth.

BROOKE

1:23:05 Yep. And so you see this as... as being worth it and benefiting your business?

TRAVIS

1:23:09 Correct. I mean to recoup 21,000 and lost revenue, one deficiencies and stuff that we're not even track. And now you can make that up easily half a month.

*--- Purchase decision ---*

### BROOKE

1:23:19 Yeah, exactly. And that's why our attention is, you know, service trade pays for itself and it's also going to... cool. So, it sounds like our best next step is to set the follow up meeting once you guys the opportunity to... to review your other demonstrations, he said that's going to be next... next week.

*--- Purchase decision ends ---*

### BROOKE

1:23:41 So if we were to set up a meeting for, with next Friday, the fourth, be enough time for you to... to talk to all of your... your options?

### TRAVIS

1:23:50 I'm looking at my calendar... actually, our last meeting is March ninth with them. So, but I'd say by the tenth of March or eleventh, we Bill, I have with the seven.

### 2 JARED WILKE 8U

1:24:09 So...

### TRAVIS

1:24:10 I'll send.

### BROOKE

1:24:10 A calendar invite for we'll do let's do like a... so 30 minutes for us to hop back up on a Zoom meeting. I'm hearing decision. And then from there, we can form a timeline moving forward after our meeting today. What I'm gonna do is I'll send you information about Quickbooks, or onboarding. I'll send you a formal quote, and then I'll just send you a stop sneak peak of service forms for you to take a look at that. I'll also look into how we handle customers that don't utilize Wordpress right off the bat. Also pro core, I'll send you information about pro core. So you're gonna get a lot for me.
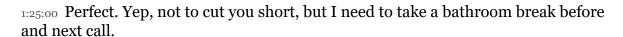
### TRAVIS

1:24:46 If I have any questions, can I am just email you back?

### BROOKE

1:24:49 Yeah. So my email will have my contact information including my cell phone, office number, and my email, please email me at any point with questions. And I'm happy to get those answered you as I can.

TRAVIS

1:25:00  Perfect. Yep, not to cut you short, but I need to take a bathroom break before and next call.

BROOKE

1:25:06  No, we're all done. Don't worry. I do appreciate your time. Both you, Travis and Jared. I'll send you a calendar invite for the... the... the said the tenth, right? Or the eleventh?

TRAVIS

1:25:15  I love them.

BROOKE

1:25:16  Okay. I'll send you a calendar invite for the eleventh, his afternoon? Fine?

TRAVIS

1:25:21  Yes.

BROOKE

1:25:22  Okay. Be sure to accept that. So I know the timing is good. And then we'll be in touch from now until then.

2 JARED WILKE 8U

1:25:27  Okay.

BROOKE

1:25:28  Okay. Thank you. Both have a great.

2 JARED WILKE 8U

1:25:29  Hi, Brooke. Hello? Hi, thanks. Bye, right?


# *The End*