



# NorthBoundary Demo with Welch Rushe Inc

Brenton Ballard with Welch Rushe Inc  
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## Participants

### **SERVICE TRADE**

Brenton Ballard  
*Territory Manager*

Mac McGill  
*SDR*

### **WELCH RUSHE INC**

Rob Roper  
*General Manager, Service Department*

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# Transcript

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

ROB

0:00 Hey, Brenton, can you hear me?

BRENTON

0:01 Yeah, I can now.

ROB

0:03 Sorry about that. I'm not quite as familiar with Zoom as I am with teams had to click on join with audio.

BRENTON

0:15 No, that's perfectly fine. Yeah. Well, I'll be honest with you. I know when it comes to our platform Northboundary, I'm a little bit newer to it. So I kinda like to leave these meetings open from what I've got from Mac. I believe you used Northboundary before or you've seen it before?

ROB

0:39 Yeah... probably... 2016 or 2017. The company that I was working for went to Northboundary as their CRM, okay. Right? So I participated in getting that set up... with our accounting team and our leadership and sales. At that time. It was mostly a standalone system, you know, certainly a standalone system for them where it didn't work with the work quarter system that they had, and it didn't necessarily dovetail with their financial system. So, there was a, there was a lot of activities around getting that started up with markups scopes of work. All those things had to be entered. The nice thing about it is once we got it set up, it was very easy to see what your pipeline was, what your winward rate was, and it made it possible to kind of, I don't wanna say barricade, but guard rail... sales proposals so that minimum margins couldn't be gone below without, you know, someone with the right level of authority approving.

BRENTON

2:06 Okay.

ROB

2:09 And like I was telling... the other gentleman when he called me is that, you know, this isn't necessarily something that I'll be deciding if we go with or not. We're owned by a PE group. There's been some discussion that they're talking about changing a financial system and the work order system and things like that. So it was timely to

gather some information. So if they ask me my opinion, I can say, well, I've used it before... unless something's changed, it's a 30 to 60 day build unless you have a dedicated team before you can really start using it. And then... there's a certain amount of time when people are doing things that... they think are best, are that come natural before you can get them doing every one of the proposals in here?

BRENTON

3:01 Yeah, I...

ROB

3:02 My, my job where we use it at every proposal didn't go through Northboundary because the field service module that we were using had the ability for certain technicians to field quote work. So those field quotes went through a separate system.

BRENTON

3:22 Okay.

ROB

3:23 Right.

BRENTON

3:24 Okay. Yeah. Well, well, that's the thing that's why I wanted to ask you that because that's a lot of information.

--- *Paper process* ---

BRENTON

3:31 But I understand what you're saying. So basically, at your last place, Northboundary wasn't integrated with what the text we're using in the field basically. So no work orders, it was like quoting this, I'm guessing send it to the customer. And then when the tech goes out, you know, they're using their own system as well to, they've got to basically put that information in their system. And then you go out is what?

--- *Accounting integrations* ---

ROB

3:54 Right. So, it was not necessarily a three ring circus, but certainly a two ring circus where, you know, normal proposals would come through the Northboundary system where field quoted work went through the work order system we were using at the time and it was called field connect and it worked hand in hand with the timberline accounting product that we had in place.

--- *Accounting integrations ends* ---

BRENTON

4:25 Okay.

BRENTON

4:35 Well, I definitely can say since, like, so, I work for service trade. We acquired Northboundary service trade would be that work order platform that you're speaking towards. So we do have an integrated solution with that. So, I mean, your companies looked at ServiceTrade a few times. They did.

*--- Accounting integrations ---*

BRENTON

4:56 I know that they didn't like it, but there were some, you know, just, this is any process that you look at with software. You know, there were things that they really liked about it. There were things obviously in their current system that, you know, didn't make sense I guess for them at that time, but what I...

ROB

5:10 It's all about if it integrates with the financial system.

BRENTON

5:15 Yeah.

ROB

5:16 Easily one to one, right?

BRENTON

5:20 Yeah.

ROB

5:20 That's usually the driving force. Everyone says that their system will work with everything if, you know, there's some code written or there's some, you know, magic software box work, but... I've gone through paperless work order, dispatching system changes at a couple of different places.

*--- Accounting integrations ends ---*

ROB

5:43 It's always painful. And if it isn't guaranteed to be a one to one with your accounting system, there's gonna be something that it doesn't work well with, right? Yeah. And the other big challenge that I've had in the past is that, you know, we do a lot of planned maintenance agreement work in our business because we're all service aftermarket, and you may have a site that has 20 pieces of equipment, and that sounds good until you try to send 20 job plans by way of e-mail with a couple of pictures on each one... right? You end up bumping up against your size.

BRENTON

6:25 Yeah.

ROB

6:26 Limitation sometimes or you gotta store the thing in the cloud and send a link and then you got one more thing to manage.

BRENTON

6:33 Yeah. So that's so service trade would definitely be the answer for that problem. So that would be that's not a, that's not a sales software problem that's a, you know, we're doing this work at the site and we need to be organized. So that way when we send information to our customer, they understand what they're looking at, what they're paying for. So service trade is literally built for the recurring aspect of that business. It's I mean, we work with specifically mechanical and fire contractors and it's going to allow. So we have what's called asset tracking and I know I'm not showing you anything because I know there's two ways we can go back. I can show you like a little bit of inside of Northboundary, which you've already seen. It hasn't changed much. And I can also get you some pricing. I can also show you a little bit of service trade and kinda what the scope of that is and how that relates.

--- Assets ---

BRENTON

7:30 But, but yeah, I mean, service trade is gonna give you that asset tracking. So you're going to be able to have every single asset that you work on. You're going to be able to have that information in the software. So when you are, when you go to work on, what do you guys work on specifically? Like at sites?

--- Type of work ---

ROB

7:49 HV a C and plumbing.

BRENTON

7:52 That's what I figured.

ROB

7:54 Various different customers, you know, whether it's a higher as apartment building that we're taking care of the common area equipment, or a government building or a private, you know, office space or a medical office. You know, something like that.

--- Assets ---

ROB

8:09 You know, it varies from place to place where we have one piece of equipment we're maintaining or maybe... 50 or 60, or we have one account that's approximately 20 locations and about 500 different pieces of equipment that we're tracking.

BRENTON

8:34 I'm just going to show you because I can show you better than I can tell you.

*--- Accounting integrations ---*

ROB

8:39 I guess my main interest would be in what's the short list of accounting software that service trade works with on a one to one with no integration software magic.

BRENTON

8:56 What are you guys using for your accounting?

ROB

9:01 It's a Sage product right now, but I understand that they're talking about looking at something different.

*--- Purchase decision ---*

ROB

9:05 I just don't know. Like I said, I'm not in on the decision of that. I'm gonna be the end user or whatever they pick. And if they ask me, I'd like to have an opinion.

BRENTON

9:15 Yeah, 100 percent. I would agree with you. You need to have an opinion, and I would even because I want to share with you last time we met with you guys, I believe we spoke with... Chris milliner, and Bob call.

*--- Purchase decision ends ---*

ROB

9:36 Yeah. Bob callow has moved on to other opportunities and I'm not sure of the other. Who was it? Chris? Who?

BRENTON

9:45 Chris and milliner?

ROB

9:46 Yeah, I don't know.

BRENTON



9:48 He's the general managers what they had him, they might be.

ROB

9:50 But I've only been over here since October.

BRENTON

9:56 Okay. So fairly new.

*--- Accounting integrations ---*

BRENTON

9:57 Okay. Well, yeah. So that's what I was say. I know that I know you guys... that's like I said, I know you guys have met with us before and that's kinda what I was getting into because I want to show you service trade and I know like basically, I know you guys, I think, you said you use Sage and a timberline for the accounting platform still, so we can integrate with Sage. Now, it just, I know there's I'm not the accounting expert, but I know there's a few things that depend on that integration and how well it goes. What I can say is that we do have customers who, you know, use Sage and they use our platforms and, you know, they're growing their business, they experiencing if there's no issues with processes. But what I would say is if you guys are open to looking at things I've seen, I would say most of our customers do use Quickbooks and they found that it's a lot easier. But I mean that's just one, I mean, we have a Rod range of customers and they all use different accounting solutions.

*--- Type of work ---*

ROB

11:00 Yeah. Well, in the company has traditionally done a good bit of government work and for some of those auditing functions, Quickbooks just doesn't meet.

BRENTON

11:12 Yeah.

ROB

11:12 The water mark for that kind of work. It's great for, you know, small commercial businesses but not necessarily for businesses that need to provide certified payroll and be able to, you know, print out the documents to survive a government audit if need be.

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

BRENTON

11:35 Yeah, no, it's funny. I actually have an accounting background and I have a brother that works in government auditing. So, no, I definitely understand they get very niche and especially when they have interviews and they view people and ask people, you know, hey, how are you spending money? Where is this going to? They

need to have a track record of every single thing that they're doing, where they're spending it, why they're spending it? And, you know, all those have to be dotted. So I definitely understand that. And that's why I say we kinda leave that up to the customer, to that accounting piece.

*--- Type of work ---*

BRENTON

12:07 Now we can help you. We do have third party companies that we partner with. It really just depends on your specific company and, you know, the size of you guys, the type of customers that you have, who we would recommend, which I can look at and see, you know, we have companies that have government contracts and they, you know, they have customers like your customers.

*--- Purchase decision ---*

BRENTON

12:25 I can see what they're using and I can kinda give you that recommendation of like, hey, this is what's been successful, but I wanna move forward and kinda talk into what you were speaking into for... or what you guys.

ROB

12:43 Need...

BRENTON

12:45 So you kinda told me like, hey, we have a list of I don't know why I just did that but we'll just leave it here.

*--- Purchase decision ends ---*

BRENTON

12:53 We have a one account. So for instance, this is an account that I made, in our, this is our field service platform. This will be where the work orders come. So after your, if your sales process team had quoted it, you would have this information tailored into this software. So now, your office, the office of the service side, this is what they would be using. So the admin team that are over those texts that go out into the field. So this is a Northboundary by the way, which, you know that. But how you have that, you know, that account, one account with 20 other, you know, locations or contracts, service trade would be able to house that information for you guys.

*--- Recurring maintenance ---*

BRENTON

13:36 And it's like this is the Bill to. So we obviously have a contract with the board of education. We don't have a contract with these high schools in particular. So we're

going to have this information disputed very well. And then I'm gonna jump into the location tab. So actually what we'll be sending our text.

*--- Recurring maintenance ends ---*

BRENTON

13:59 Sorry, I might share my screen, wrong? Yeah, I just shared this tab. It's all right. Can you see my screen? Yep? Perfect. So for instance, at this specific site, let's say we had a job plan today, so I don't have one, but this is where we're tech. Our techs are going to be working.

*--- Recurring maintenance ---*

BRENTON

14:18 You can see that same information. And then our first tab. And pretty much wanna also hit on this Viewpoint of the page. So you can do everything for this specific location. So one of those accounts, you could do everything from this page and we have services. So services are two main things. These are our repairs. So any time we find or we have a one time job at that location or if we have anything that's recurring. So like you said, you guys have service contracts, this will be where you would, how's that information? And it will remind you of, hey, this is when we're supposed to be out there.

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

BRENTON

14:57 This is when we're supposed to be working on this specific site. This is everything our tech should be doing at this site. This is how often you know, our tech should be at this site and, you know, we do have some cost information. Obviously if you don't want that, you know, we can get that toggled off.

*--- Type of work ---*

BRENTON

15:15 But this is the service side of things and you would be able to keep track of every single service that you have for this particular company. So I know this or I don't know you probably wouldn't be able to speak to what you got, what they're currently using in that software, but I know that a lot of H back and plumbing companies, they would, you know, this is something that they would.

*--- Recurring maintenance ---*

ROB

15:36 Need.

BRENTON

15:37 Being able to keep track of that recurring information, this is a set, it, forget it. So this is happening quarterly. So, you know, once you set this, it's on going into you stop it.

ROB

15:50 Right now... in your system, let's say you have... three or four pieces of equipment on the same quarterly visit.

--- *Assets* ---

ROB

16:06 Does your system provide for the ability to do equipment specific job plan against each one of those rather than, you know, the high level quarterly check, electrical connections, check the heat exchange or check for, you know, maybe doing a water heater, a water source, heat, pump, a rooftop unit, and exhaust fan.

BRENTON

16:34 We're we're going to get into that. And that's perfect that you asked. So I can let me do a jump at that. So like for instance, that asset tracking that we talked about. So here we have, and this is a security company I was using at the time. We have a security gate at the front. We have a boiler with all of this information. We have a rooftop unit as you just pointed out right here. So it's all asset tracked. So a lot of times we find like we'll be working at a site. They'll have a problem with one specific asset, but no way to kinda track down that information from the 20 different things you work on to that one asset well service trade. So, for instance, like this rooftop unit that we just spoke about.

BRENTON

17:20 So this rooftop unit, we have information of just this specific unit at the site. We have every single service that we've done related to this rooftop unit, we have every single work order. So these are the work orders and you know, we have, you know, what type of what type of work it was, who did it?

--- *Deficiencies* ---

BRENTON

17:43 And if we build for it, you can see all that in here. And then you also have, you know, the deficiency. So anytime we've made a repair or we went out to look at this equipment, and we found that the compressor was broken on our rooftop unit, or, you know, I needed a widget or, you know, any of those things that would be here.

ROB

18:02 Now, is that populated by the technician, whether there they have to fill out this deficiency?

BRENTON

18:07 So, yeah. So this would be that pull through revenue, so revenue that you guys kinda weren't going out, to get this would be if you found that revenue, you would be able to basically quote that revenue while you're right there. So, yeah, this would be something that the tech is finding out in the field, that deficiency of that.

--- Access to information ---

ROB

18:30 Pull-through...

BRENTON

18:30 Or repair work. But, but yeah. So that's pretty much that like I said, you can also see the quotes aspect of it and all this information would actually go in, go into the mobile app for the technician. And if you wanna see that, I can definitely show you what that looks like as well. Do you wanna see what the mobile app looks like a job, what the tech would do with that?

--- Access to information ends ---

ROB

19:00 I think probably my main question for today just to keep it high level would be... instructions for how to operate that you already have them build?

BRENTON

19:11 So, yes. So.

ROB

19:12 You're going to have to build?

BRENTON

19:14 So, no. So this would be specifically made to your company. You guys already have this information. You guys already have your service contracts. You guys already have your pricing. You guys already know the assets that you're working on. We would just get that information when you're onboarding, and we would build this. Basically, I wouldn't say like for you, but it would be something that's built for you because you have all this information already.

--- Assets ---

BRENTON

19:38 It's just not being tracked in one location and that's what ServiceTrade would do clean up, you know, any papers, you know, obviously there's a need for papers, file, cabin and stuff like that. But wherever they were keeping this information, we would just have access to it and we will Bill from and obviously, they may not have every single asset they may have not kept track of because what we find is a, they work on a lot of different things.

--- Assets ends ---

BRENTON

20:02 They have a lot of different places that they keep stuff, a lot of different information. Not everything is able to be kept, but some of that stuff will have to be inputted as you go. But you'll be able to see like this is very easy. You know, once you have a basis, and that's what we give you an onboarding.

--- Tech time tracking ---

ROB

20:17 Right. And I'm sorry, I was being more specifically question, do you have the, how to, you know, how the technician logs on how the technician updates the work order notes, how the technician adds his purchases and hours of labor?

BRENTON

20:36 Yeah.

ROB

20:37 Already built or is that something that a company would have to build?

BRENTON

20:41 No, this is already, in the software. So let me show you.

ROB

20:46 Right. So the training part because, you know, how it goes, you have to have some good handouts for how to get from your log in to your labor report. So you get paid.

BRENTON

21:02 Okay. And let me, so let me see if I can answer this, right?

--- Tech time tracking ends ---

BRENTON

21:05 Because I'm kinda confused on what you're saying. Are you just asking like how to move in the software to do one special?

ROB

21:12 Like user training? So, you know, somebody buys this software and they got 20 tests. Are they going to have to build their user manual for how the 20 techs are going to interact with the system? Or do you already have something that's built that could be adjusted for how we're gonna do it?

BRENTON

21:32 Yeah. So we have something that's built already and it would fall into that adjusted category. Now, we'll say 99 percent of the people who do use ServiceTrade, we're built for the built for what they do already. So they often find that it's a lot easier to do it how we've already got it because it's built for you guys.

--- Implementation and ongoing support ---

BRENTON

21:54 Like it's literally built. We don't work with residential or anything like that and to also speak to. So we do have courses that we give for onboarding very simple. Very, they're very guided walkthroughs of how to use this software and what's the best practices for this. And I can say for me being able to learn the software and a limited amount of time, I would say that this software is very simple.

--- Implementation and ongoing support ends ---

BRENTON

22:20 It's not hard and they've made it to where someone could pick up a phone. And if they understand, you know, how they do their current work, they would be able to understand, okay how does this relate into the software? Right? But yeah, I mean, and I know you were here for Northboundary, but I know a lot of the problems always come from the field app. They always come from like the field app, their work orders that comes from that. And we kind of once we acquired Northboundary, we basically made those two ecosystems be able to exist together, you know, your sales department with that in house, you know, service team. But I do want to show, you know, I wanna do a job and just kinda show you what it looks like. I know you're not, you know, someone who would be debating this, but maybe we could, you know, definitely schedule someone who's over in the service department and let them see the side of it. And then, you know, we could also get into Northboundary as well too. But, but let me go ahead and schedule a quick job just to show you what it looks like.

BRENTON

23:47 It's two 30.

--- Assets ---

BRENTON

23:57 So this will be the job page. Now, I just threw some information together for the purposes of today. But again, that appointment thing. So for instance, I'm working on a gate, but if we needed to add more services, how you ask if we had 20 other places, we could go ahead and say, hey, you know, we need to work on this rooftop unit as well while we're there, you know, if we have there's templates that exists. So every time you work on a rooftop unit, this information can auto populate every single time. So any time we're doing, you know, that plumbing work that H vac work, all this information, can it say use a template right here? You know, we would just

hit that and then we will search for one of our templates that we've created and, you got.

*--- Access to information ---*

ROB

24:45 In the technician would have to find the right template.

BRENTON

24:49 No, the tech would not be doing this. This is pure office information. We haven't got into the actual text out of it. So this, the tech would not use any of this that we've went through. He wouldn't he wouldn't it would be someone in the office. So this would be like an office admin or manager and they would be able to because, you know, they would be answering the phone. So they would know like, you know, hey, we're going to be working here at this time. You know, this is our preferred technician. So I'm the preferred technician.

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

BRENTON

25:19 I work on all the gates if there was a call and they needed to add somebody else and they would be able to do that. This is all like before we actually get to the job, you know, they can see the clock events, you know, when they're in route, when they're on site, you know, also the job prep.

*--- Assets ---*

BRENTON

25:36 And a new thing that we have is also we have a break added on there too. So if they take breaks, we have the asset that we're going to be working on today and all of its information. And then, you know, and as we do work at the, as the tech gets to the site and does work, you know, as he uses these items as he, you know, looks for information you'll be able to see like all of this flows to him.

*--- Quote templates ---*

BRENTON

26:01 So he doesn't have to call the office back and ask any questions, you know, everything's in the app that he's gonna need to pretty much get it done.

ROB

26:10 So, if you were assigning someone to PM, a rooftop unit, is that template already included or do you have to build out all the templates for the work you wanna do?

BRENTON



26:25 So, yeah. So that would be something that like we have a basis of how to complete that, you know, template, but there will be two options. If there's a template, like for instance, every time you go out to do a roof, do you already have your pricing set? Like, do you know how much you guys are gonna make and how much you guys are gonna charge? Do you have details of everything you guys are gonna do? So all of the information that we need for a template is nine times out of 10. Do you already have that information? It's just a matter of, you know, someone putting it in. But again, like I said, if we, if you guys have that information and you have it in a place where, you know, we can obviously see it, you know, we obviously will be able to set that up for you. If it's if it's the one off where, you know, this is a job that, you know, anything can happen on this type of thing. Obviously, those are going to be things where you guys are going to have to create it manually. But for your, you know, I would say for the bulk of your service work, anything that's recurring that you're doing more than once that's obviously going to be able to be made into a template because there's already a template for the work that you do, right? So.

--- Assets ---

ROB

27:36 And... well, I've had a couple of different systems. Probably the one that works the best... as you built your plan service agreement for the new customer site, you loaded the equipment as an asset and you linked it to a job plan that you built in the system. So that when the technician arrived on site to TAM that piece of equipment, it pulled up the correct job.

--- Assets ends ---

BRENTON

28:12 Yeah. So that...

ROB

28:13 Had systems where the technician had to look through the library of forms... pick the correct form and then complete the job plan?

BRENTON

28:28 So, I would say service trade would be the perfect... middle of the two. And I'll kinda show you why? Let me.

ROB

28:40 Because what we don't want is for the office, they have to pick the job plans every time the thing.

--- ST app contracts and pricing ---

BRENTON

28:47 They have to come.

ROB

28:48 Do to be done because that's... well, it's a ridiculous use of their time. Because once you put it in, once the rooftop unit, job plan goes with the rooftop, whether you got one of those under contract or a 1,000 is under contract.

BRENTON

29:05 Yeah.

ROB

29:06 So, you don't wanna have to picket every time.

--- Assets ---

BRENTON

29:08 So you would have so basically the technician, the preferred technician. And as they assign work, they're going to have access that they tie it to. And then, you know, as like if it's recurring. So for instance, if it's specifically that rooftop unit, they're going to be able to, you know, basically have that information pre populate to them.

--- Tech On-site ---

BRENTON

29:32 And they're also going to be able to see other information at that site. So, you know, let's say they ask you to work on something else. They're going to be able to also see that information too. But I guess the question that you're asking, is the person in the office going to have to basically create a job or create something like I just did every single time they have to go out? Is that kind of what you're saying?

--- Tech On-site ends ---

ROB

29:57 Right.

BRENTON

29:58 No. So like I said, it would be, there would be that recurring work that you guys already have planned. And then there would be like the phone call work. So basically, whenever there's something goes wrong if it ever does, there would be that type of work. But you guys, as you did those jobs, those already exists, that paperwork for that job already exists. So they may have to schedule it, but they wouldn't have to go in and make all these natural selections to that. And again, with scheduling, you can just choose your preferred technicians. You guys already have people that you want doing certain things. You don't want your plumbing guys going out on H stuff. You don't want your hvac guys going out on plumbing stuff. So that would already be in the system. So, you know, but let me go ahead and grab, my port really quick. And then I'm gonna jump into the tech app and I'll kinda show you like how the information flows, what they're able to see. I think it'll kinda give more context to, you know, what that, what the fill platform can do, and, you know, how service trade

can pretty much, you know, coexist altogether. Give me one second though. Let me stop shooting.

--- Dispatch ---

BRENTON

31:58 So this would be that technician view for instance of the job I just created. And as soon as they log into the app, they have their schedule. So, you know, what's scheduled if they don't want to filter by today. So maybe there's some other appointments that they're the preferred technician on. But it's not for today. They would be able to obviously see that information. And then, you know, filter to kinda concise it down of, hey, this is what I need to be doing today. And then obviously, they can see, you know, that unscheduled work and then that, you know, completed work that they've finished.

--- Tech On-site ---

BRENTON

32:34 So first of what we're gonna do and I'll show you the features of it. So we have those clock and events. So, you know, as they're getting prepared for a job... you know, once they're in route, you know, they can notify the customer. This is some of the, you know, the nice stuff that, you know, most companies aren't really doing right now. You know, they can have a picture of themselves, have their e-mail they can send it to whatever contact they're going to be meeting at that site just to let them know, hey, we're going to be there at this time... but let's say, you know, we got there, we got to our site. It's gonna ask, hey, do you wanna go ahead and clock in since you're there? Yeah, we do because we're at the site. So when the tech gets there to the site, you know, the first thing I would personally do is I will hit that services tab and then everything we talked about. And then I showed you at the beginning. Is there they can see, you know, what they're working on, you know, where it's at and everything they need to do before they leave. Now, we also so have, the duration of time is supposed to take in the price, but those things can be removed.

--- Tech On-site ends ---

BRENTON

33:41 So, you know, they don't have to show the, you know, you guys don't want to show that if you don't want to, I know people are always afraid of someone tech starting their own business and going out and doing their own thing. So, you know, you can have that toggle off. So you don't have to share that information. But again, that saves the phone call back to the office of, you know, what's going on right now. What, what am I supposed to be doing? Hey, and, you know, and we'll keep on moving. So next, I would hit on that asset.

--- Assets ---

BRENTON

34:09 So this is the asset I'll be. Working on today, I have that service history. So if I had, you know, done 100 jobs on this specific asset, I would be able to see that right here in the app. Okay, this is the last time that I worked on it and you know, you also

be able to see any deficiencies. Again, we'll go over that. Any attachments, any comments? So like if you wanted to leave a comment of, you know, hey drop paperwork off at so and so desk before you leave, you would be able to do that here as well or if a door is jammed on a unit, you know, anything like that. And then you also have that, you know, great history of, you know, what are we working on? So, you know, the location of it, we know who the manufacturer was, and depending on the type of asset we have, you know, specific information for that asset, but all of that information is here that the tech can see and, you know, it's within a few clicks. Any questions on that?

--- Forms ---

ROB

35:11 Yeah. You know, if you have time, I'd like to see what a job plan for a piece of equipment looks like in your test database here. And if you can also map it to like a job hazard analysis or a safety checklist.

BRENTON

35:29 Okay. Safety checklist. Okay. Well, with that being said... so again, I will continue as far as with that, I think what we will be able to show for that, we do have like forms. So, are you, are they using forms when they go to sites like pieces of paper that they're getting filled out? Do you know?

ROB

35:53 We have electronic forms?

BRENTON

35:56 Electronic form? Okay?

ROB

35:57 Job plans that are mapped to certain plan service agreements. So that if the customer wants their rooftop report submitted with the work order... it's a separate sheet of paper for that piece of equipment that could be printed out. We're not doing paper forms and then an electronic work order?

BRENTON

36:23 Okay. So, yeah. So that would all be able to live inside here, that would be on your paperwork tab as far as those inspections sheets. And I noticed how you said I don't have any in here.

ROB

36:39 Like like I said, in the past, I've had a system where the tech had to pick the right form out of the library... which is less than optimal because what if you pick the wrong one, it's one more step for the technician to do... the things that I've seen that work.

--- Assets ---

ROB

37:01 The best is when you can map a certain type of piece of equipment.

BRENTON

37:05 Yeah.

ROB

37:06 Specific job plan. So when they click on that piece of equipment, the PM and the right scope of work comes up, they fill it out and it transmits with the work.

BRENTON

37:17 Yeah. So that's exactly what I wanted to show you. I don't have one loaded up on this account just because this is a new account for me, but we can 100 percent, we do that and you can change as the asset changes. So like if they asked you to work on a different asset while you were there, it would be here in this if I hit all assets. So here we go. So I would.

*--- Recurring maintenance ---*

ROB

37:39 Typically do that on a PM agreement, you would work on the things that are under contract. If they want something separate done, you do a service?

BRENTON

37:47 Yeah, that's correct.

ROB

37:48 Separately Bill it separately. That's really what you don't want, your employees doing is working on extra stuff, a fee that you agreed to work on less stuff.

*--- Forms ---*

BRENTON

38:01 Yeah, yeah. Agreed. And that again, that's what I meant right here. So, yeah, right. When you hit this all slab, you would be able to populate specific forms for that specific asset. So like for instance, if this boiler had a specific inspection form that they filled out with, it would populate, you know, as you know, as they, you know, wanted to get to that asset.

*--- Forms ends ---*

BRENTON

38:24 So that would be able to be done in this. And, I can circle back with you and also show you that as well too. But to kind of finish up here, you would basically as you

use items. So inventories of understanding what our techs are using as they go out in the field, you know, you're just will be marketing these use.

*--- Quote templates ---*

BRENTON

38:44 So as we, you know, use this stuff, we're gonna go ahead and market all used... market all using. We're done. If, for if for whatever reason, we needed to add an item specifically a widget, you know, we could do that very simply... and... we would.

BRENTON

39:12 Perfect. So the hvac unit service, we have one, we have two... one and then would be visible to the customer.

*--- Quote templates ends ---*

BRENTON

39:21 Then we would hit... but again, all that information lives there. So you could keep track of, you know, what they're doing at sites and then, you know, last one at least obviously the pull through revenue. So as you are discovering... issues at the site, you know, let's say we get there, you know, there's... we'll do this from this gate.

*--- Deficiencies ---*

BRENTON

39:48 And then we're... gonna select the severity as well. So it's inoperable. But again, just really looking at, the issue that we're having. We're saying, hey, now this is the issue that we have, you know, we have a broken... system. We're gonna go ahead and save it. We're gonna take a picture of it and say, we'll take a quick little photo. So as we're in the field, we snapped a shot of it. And then we're also we're gonna make this visible to the customer. So, hey, this is a broken key system.

BRENTON

40:33 And then we're going to record audio memo, say, hey guys, when I was outside today, I found, you know, a broken, you know, kiosk system wanted to go ahead and replace it. We will go ahead and make a note and then send it back to the office that way, you guys know. So instead of having to write a long report about what you found, you can just record a quick audio message, explain exactly what happened within a few seconds. And then save it. And again, these other selections are pre automated because you want to build that history. So, you know, like I said, I selected the severity of it. It's not working. You know, it's tied to that asset back into, the office. So we have that information, you know, we also have the service line. We have the status, you know, this is a new one. And then, you know, we can leave a note for the customer replace. So, you know, we want to replace it. And then that's that. So we just added and we found some potential pool through revenue to add. And, you know, that's pretty much the... mobile, the technician app, for the most of it. Now, I know this was unplanned. But if you wanted to send out again, I definitely could get that paperwork look for you.

--- Forms ---

BRENTON

41:47 So you can see what that looks like in the app. And you know, how we could have a form, you know, populated for you that the text could use and fill out as they're working on a specific asset.

ROB

42:00 Okay. Yeah. And you know, like I say, I don't know what the plan is at this point.

--- Forms ends ---

ROB

42:06 They, they have a number of other companies and they already have a product that they're interested in bringing to us... but it was timely and that, you know, I heard rumblings of, there may be a system change. So I thought if I gathered a little information about this, it would be helpful... what's the price point on something like this per user?

BRENTON

42:30 Per user. Yeah, let me go ahead and get that to. Let me finish here. We'll go ahead and jump out of here real quick. And I know you were interested in the Northboundary pricing as well, too. Is that true?

ROB

42:47 Well, yeah, I was curious what it costs.

BRENTON

42:50 Okay.

--- Access to information ---

BRENTON

42:50 Yeah. I can also give you that our pricing is on our website. So we're very specific about pricing. So as far as for ServiceTrade, it would all your office users would be free. So it would essentially just be your text. How many texts are you guys using currently having a service division? Do you know?

--- Access to information ends ---

ROB

43:09 Roughly 20?

BRENTON

43:13 Okay. So, so for 20? Okay, perfect.

BRENTON

43:28 Okay. Yeah.

--- Pricing ---

BRENTON

43:56 Yeah. So it'd be around it'll be one 39 per tech, so.

ROB

44:02 Year per month?

BRENTON

44:04 That would be, it'll be billed annually. So that would be obviously time that's the per month.

ROB

44:12 Now.

BRENTON

44:15 And then...

ROB

44:16 It's quite a bit more than a lot of systems.

BRENTON

44:20 Yeah. Our pricing and what?

--- Purchase decision ---

ROB

44:22 I know why you guys give a free lunch for setting through the presentation.

BRENTON

44:29 This was, this was not a full presentation. I would definitely love to get maybe a service manager call and I could kinda pull in also my manager as well and just kinda give you guys a full layout because what I just showed you includes a lot more.

--- Purchase decision ends ---

BRENTON



44:46 It includes the service portal, you know, for your customers. So, you know, they can keep track of their information and understand like they have to call you. They could just go on a computer and say, hey, we need XY and Z done on these assets. So it just includes a lot more than like what I went into. And I would also say, you know, with pricing, it's really as you look at other softwares and what we find is people are a little bit over promised at other software companies. Again, our company was directly made from someone who saw an issue within the mechanical and fire industry as far as commercial contractors.

--- Customer engagement ---

BRENTON

45:23 So like our whole, you know, company is built around the asset tracking, being able to have information in the right places for the right people. So that way when the ball gets in their field, they know how to move it through the process. So I would say like right now our average customers experiencing over 37 to 40 percent growth in revenue and that's just because they've been able to streamline their processes. And now when you have a quote, when you have a potential like a good thing, I would bring up to the service managers, you know, how many repair opportunities are we coming across? That we're not capitalizing on because our current system, you know, doesn't have a doubt in quoting process.

--- Quoting ---

BRENTON

46:02 You know, how many times have we sent the quote to a customer? And we haven't fully explained in detail what that quote is about or what we're doing at that site. How many times have we went to a site for some service work? And we haven't sent that customer leave behind to say, hey, this is who is there.

--- Customer engagement ---

BRENTON

46:17 This is what they did. This is the analysis on your current equipment. So when you add in those, you start to build that profitable customer loyalty. And then, you know, being able to track quotes. So you wanna know your customer shopping quotes with other guys, you know, being able to see that.

--- Accounting integrations ---

BRENTON

46:32 So we didn't get into a lot of that because I didn't plan on showing you service trade. But from all the issues that we, you know, kinda discuss service trade, I think would definitely solve, you know, most of them, majority of them and it would be that accounting piece is obviously going to be, you know, I would say probably for you guys, it seems like one of the bigger things.

--- Accounting integrations ends ---

BRENTON

46:55 But on the day, to day processes, you know, ServiceTrade is definitely going to be a good fit for your company. I mean, that's just, I mean, I don't know everything, but I'm pretty sure if we talk with a service manager, he's gonna say, you know, this is everything we do. You know, this is what we need. But yeah, and like I said, and I also can get you the Northboundary pricing as well. I always say north bound is a little bit cheaper. So, do you guys have a sales team or how many sales users do you currently or how many sales users would you need for?

--- Pricing ---

ROB

47:27 We have about five.

BRENTON

47:30 Or five. So, yeah. So you'd be looking at... you'd, be looking at about 99 a month for all your users, for your all your.

ROB

47:39 As users or each user.

BRENTON

47:41 So we don't charge you again for any administrators and any managers. They're all free. So it's only your five sales.

ROB

47:49 Wow. So they'd be 500 dollars a month?

BRENTON

47:51 Yes. Now, there is an onboarding cost of 1,400 bucks. So it'd be 1,400 for the first three users, and then it would be 100 for every additional user. So the five users, so would come out to 1,600 bucks.

--- Pricing ends ---

BRENTON

48:09 Yeah. So Northboundary is... a lot more affordable. So, but yeah, and like I said, I definitely would love to, you know, if you guys, if the Northboundary thing is something that you guys want, you know, I definitely can get that set up for you. But on the back end with service trade, you know, they do have that integration piece so that you guys are going to be able to coexist with each other and that's to, you know, streamline a lot of the processes.

ROB

48:40 Yeah. No, I would say at this point, there's really no reason to book any more time until we get a clear indication if they're gonna make any changes and what those changes are gonna go to. Okay? If they're open to recommendations and suggestions... well, then there will be a much deeper dive because, you know, I got a list of about 32 things that a paperless work order system has to do... which really helps limit the field.

--- Paper process ---

BRENTON

49:16 I got you, man. I got you, on, the paper list. So you send the paper list work quarters. Okay? So you have, there are 32 things that...

ROB

49:25 Industry.

BRENTON

49:26 Okay.

ROB

49:28 You call it? It's a paperless work order system?

BRENTON

49:31 I think I service form, I believe they may call it or a service like that. Yeah.

--- Paper process ends ---

ROB

49:37 I mean, there's certain things that it has to do for a service organization or to be worth the investment.

BRENTON

49:45 And, and I will say with that last piece, so we do make custom forms. So if you guys had your own forms that you wanted to get made for your specific company, we do handle that for you, right?

ROB

49:58 Probably the only last and most important question because like some companies similar to yours like BuildOps, guarantee that whatever system you're using, they will pull your history over. So if you got photos in your system, if you got problem issues listed out in your deficiency tab, all that information gets pulled over. So you're not starting with a blank database?

--- Purchase decision ---

BRENTON

50:28 Yeah. So with us, we would give you... I would actually have to ask to see, what, how far we would go with it. I don't know. I don't know how far we go with the information you currently have. That's just me not knowing, not saying that. We don't I just don't want to tell you a lie because the customer you're talking about will definitely tell you that. And then when you get into the process of this, I would also ask you, I know if you're talking to BuildOps, I would ask them to show you what that looks like in the software, what that?

ROB

51:03 I'm not talking to him. I just happened to know a colleague who's company is looking for a new program and that's the one they're leaning heavily towards.

BRENTON

51:15 I would say if they're leaning heavily towards them, it's nine times out of 10 because of cost. They're willing to cut their prices and cut their margins just from my experience. When coming across them. I would tell your colleague to really ask them not only just ask them questions but get on a call and ask them how do you do it in the software?

--- Purchase decision ends ---

BRENTON

51:38 Like what I just showed you that's how your software is gonna look? You know, you know, as you, I mean, of course, as we get information into it, but that's how our software looks. If you purchase that, you're getting that software. And that works and runs with BuildOps. We've had countless people not choose us the first year and come back the second year and say, I don't know what I was thinking because they sold me on a dream. They gave you this nice picture that it can do X and Z. And then, you know, they come back and they realize, hey, this software can do half of what we talked about on our call.

--- Purchase decision ---

BRENTON

52:11 So, and then, you know, so I definitely would just say, you know, ask him to go a little bit deeper into whatever he's asking questions about and to see like be able to get on a demo and have a guy walk you through what that looks like in their software.

--- Purchase decision ends ---

BRENTON

52:25 Because like again, you saw me create a job, you know, you saw, you know, what an apt looks like, what cock events look like. You know, where that asset tracking information lives. I would, again, if you have them say, hey, how far did you really go on a demo with them? Did they just tell you? Hey, I can do X, it can do exactly what, you don't know how many times I get on a call, someone's like, yeah, I'm talking to BuildOps, they told me they can do this. Can you?

ROB

52:54 They can do it. But what they really mean is that you can figure out a way to work around it if we can't do it.

*--- Accounting integrations ---*

BRENTON

52:59 That's that's exactly.

ROB

53:02 You know, I mean, the place I was at before, you know, it was a start up. It was running on Quickbooks. The owner was very frugal. So, I went with FieldEdge... and FieldEdge worked for us because it provided a place to do proposals, track assets, track history, due time, keeping everything worked with Quickbooks that we needed to work with Quickbooks. And it was 20 dollars a month per tech pretty much.

*--- Recurring maintenance ---*

BRENTON

53:40 Yeah.

ROB

53:42 But I had to build every thing out.

BRENTON

53:47 Because it can't do multiple jobs, and that's what I was gonna ask. So when you...

ROB

53:50 Do multiple jobs per customer. But if you had a service call and a PM, you would have two tickets, which is the way you should do it, anyway, right?

*--- Assets ---*

ROB

54:06 The limitation was, is if you put too many pieces of equipment on a PM, you couldn't transfer the ticket to the customer. So you have to divide up the work based on equipment type or account to get to the point where you could transfer it, the work order when the technician finished filling out the tickets, right?

*--- Assets ends ---*

ROB

54:28 Which was not uncommon. I mean, our system here, there's a megabyte max and you can't send an e-mail over that amount. So, you know, it depends on what you're looking at. Sometimes you gotta think a little outside the box but, you know, I appreciate your time. It's it's interesting.

--- Purchase decision ---

ROB

54:47 I think if they get serious about looking for something and I'm lucky enough to be on the selection committee, I have a ton of good hard question.

BRENTON

54:57 Perfect.

ROB

54:57 I've been through this a couple of times and every one of them is burned me a little bit.

BRENTON

55:03 Well, we're trying to, we're not on that list yet, but no, I definitely would love to follow up with you. And I would also like to understand, do you know who the main decision maker is? I mean, I'd love to at least try to reach back out. I know we had, like I said, a few meetings with you guys and you guys weren't evaluating with us. So I just like to know who still there or if everyone's knew.

--- Purchase decision ends ---

ROB

55:30 If you wanna follow up with me in a month and see if there's any movement on, you know, new system change. You know, I'll let you know, but, you know, like I say, at this point, all I've heard was they may be thinking about changing system.

BRENTON

55:48 Okay. And...

ROB

55:49 I don't know what that means. I know they own other companies. They may already have a platform they're happy with, and if that's the case, I'll say, wow, I'm glad you brought this here. We're gonna make the most of... right? Like I said, it's not a decision. It's in my swimming. It's something that I may have some input or influence on.

BRENTON

56:11 Yeah.

ROB

56:12 And because I've been through a couple of painful system changes and two startups... well... I'd like to think that I've learned something from this.

BRENTON

56:26 I hear you, man. I hear you. I would tell you this with us onboarding with us. I know that can be painful. You know, if we got to a point, what we also do like download processes, we'll let you talk with one of our customers because I know again, I don't want you to say, hey, this guy again, just like everybody else trying to sell you something. And, you know, I can do, the dream of the west coast. I like to say, hey, this is someone who's literally been through, you know, what you guys are looking at and they'll speak towards if it's working for them, how it's doing the good, bad and ugly. So, you know, that's something that we also include. So, but yeah, I definitely will follow up with you in a month before I let you go. Is the Northboundary, something you have approval on or anything like that?

ROB

57:13 I was just, they reached out to me and said, hey, would you take a meeting to talk about this? And I said sure, I'd love to know what it costs because I got some experience with that, okay?

--- Pricing ---

BRENTON

57:22 Thank, but.

ROB

57:23 I gotta tell you 500 bucks a month... on.

BRENTON

57:28 You don't know is it is still pricing? So that's really the.

ROB

57:32 Right now, we have... a very good process, a way to track things. It's just not easy to see in one place what it's been working for the company for 50 years.

--- Paper process ---

ROB

57:44 We had a lot of smart people in charge and I'm new to their system. So... I've adjusted to this is how we do things, right?

BRENTON

57:56 Yeah, it.

ROB

57:56 Works. We're selling work and we're able to track work. And not much is falling through the cracks. I am working on revising our service processes with our service manager and assistant service manager right now, just so we can trim some of the corners off, make it smoother.

--- Paper process ends ---

ROB

58:14 So, no matter what happens, we'll have a solid proven process, we can repeat, right? That any system would have to work with.

BRENTON

58:25 Yeah, it just seems like that integration piece, you know, not being able to. And, how do you guys go about that? So when you do a service or you sell something, how do you get that over to your service team?

ROB

58:38 Well, we have a formal turnover process that goes through, you know, some internal approvals and routing first and then, you know, there's a hand.

BRENTON

58:49 Okay. Well, I definitely got you there. Well, I appreciate the time, Rob, I will give you a call like I said within a month and see how things are looking. And, you know, like I said, as we get updates and as things change here to also, you know, send you an e-mail and just keep you in the loop of what's going on. And obviously, if down the road, it comes to a point where you guys are looking at some other things, you know, we'd be glad to at least work with you or, you know, at least have you evaluate our product?

--- Forms ---

ROB

59:16 Sure thing. And, you know, if I were you before you do another one, is I throw a custom form in there for a PM so you could show it off.

BRENTON

59:24 Definitely, man. I do apologize about that.

ROB

59:28 I got one of these books that man's got every job plan you could ever imagine already written. You just got a...

BRENTON

59:37 Bring it.



ROB

59:37 Into your form, right?

BRENTON

59:39 Yeah.

ROB

59:40 So... or you could find a bunch of stuff on the internet, it wouldn't have to be a lot, but, you know, four good steps of lockout tagout, do the work, run through your checklist, turn the thing back on check for operations. I know a lot of people like me would like to see that.

--- *Forms ends* ---

BRENTON

59:56 Okay, perfect.

ROB

59:58 But hey, I really do appreciate your time. You did a great job. And like I said, I don't know whether this is gonna go anywhere or not because we have a system that's working. We have a process that we're streamlining... if they decide to change. I'm just hoping to get a little input into before we do that. We'll do these things, right? Right? So, all right. Very good. Well, hey, man.

BRENTON

1:00:26 I like.

ROB

1:00:27 Your Monday?

BRENTON

1:00:28 You say that again?

ROB

1:00:30 What's left of your Monday?

BRENTON

1:00:31 You too, man. You too, man. I appreciate the time.

ROB

1:00:34 All right. Take care.

BRENTON

1:00:35 You too. All right. Bye bye.

*The End*