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Participants

Other

Phone Caller #4

Phone Caller #2

Phone Caller #3

Phone Caller #1

Topics

Transcript

PHONE CALLER #2

0:01 No, as our business as a whole, like our coo or finance is all in one.

PHONE CALLER #4

0:08 Go on. So thing.

PHONE CALLER #1

0:10 Well, financials, yeah, you can have financials on one. But what he's saying is some people are out there looking for the mythological fairy tale creature called the all in one and it doesn't exist or else we wouldn't be in business. And from a strict semantic standpoint, it can't ever exist.

--- Accounting integrations ---

PHONE CALLER #2

0:32 When I'm running service, I do not want to have to go to get my financials in a different platform altogether. What I'm running, I need something that connects to it, right? So it's like it's real time also project same way. And then I want to be able to go to one like log in one place. And I projects, we can look at our service business. It all feeds in our financials. I can get as much as I'm allowed to get out of financials, all that can.

PHONE CALLER #3

0:59 That's fine. You can connect multiple systems, but you're not going to have one system that is great at running your service operations.

--- Accounting integrations ends ---

PHONE CALLER #3

1:09 It also happens to be your ledger in your Natan, it is qualified to be a system for structure. Thing doesn't exist there's.

PHONE CALLER #2

1:18 Okay. I get you. But that's his department is gonna be the financial part. So, as long as long as what I'm out putting is to, then he can give me what I do for, my, how my business?

1:31 Yes, correct. And that's yeah. And that's the way it goes too, is.

PHONE CALLER #3

1:36 So...

PHONE CALLER #1

1:37 Because we have lots of these conversations with hundreds of companies across the country, right? What often happens the first piece of software they purchase their accounting system becomes the holy grail, the record of truth, right? And so, they'll try to bastardize that system by forcing a lot of project and service stuff in there. And they get all these cooks in the kitchen. It becomes a mess and spoiler, alert. Accounting systems were never designed to be service software.

PHONE CALLER #4

2:02 Where, right?

PHONE CALLER #1

2:05 Yeah, correct. Absolutely. So.

PHONE CALLER #4

2:08 What?

PHONE CALLER #3

2:14 You hold on my?

PHONE CALLER #4

2:16 That's right? Or application that this or that I have them all connected, correct?

PHONE CALLER #3

2:23 Right now, when you negotiate with them, you need to negotiate that you will never have API charges associated with the up fit partner products that you buy. The one right now, they are diving in on people that have been with them for a while and adding all these API charges, right? So if you decide to do it, we like it, right? It's modern and actually has a roadmap sport Construction. Most of them don't like a rapport, Construction, great platform, no roadmap or Construction impact, actually how to work that, right? So we're on that, but you're going to get everything you're doing yet in your first negotiation. And one of the first items you need to have is the line item in there as a note is, you know, there will never be any API charge that ever or work what you wanna do with the API or work at any partner product that you purchased engages with. And they'll give that up on the first set. They'll give it up and we'll get that term forever. If you don't get it, they'll add it in later and, they will try to charge you for something that they sold as a feature that they then later convert the charge.

PHONE CALLER #4

3:50 Yeah.

PHONE CALLER #1

3:51 Yeah. And I reiterate they're a partner. So, we like intact. In fact, that's why we're at the table right now because they brought us in. And the reason that we're vehemant about making that point is because a lot of the contractors out there are looking for that mythological creature. And sometimes you can find something that looks and smells like it. But usually the people who suffer is the service team, is the people that they were trying to benefit the most. So, so that's good. So you're not falling for that. That's awesome. So I'll give you a little bit of background on service trade.

--- Type of work ---

PHONE CALLER #1

4:20 So we focus exclusively on commercial service contractors and we handle everything from scheduling, dispatch, quoting, tracking, your maintenance agreements, the tasking, all that stuff. But we also have the ability to manage what we call service.

PHONE CALLER #4

4:36 Projects.

PHONE CALLER #1

4:37 Right. So kind of as you've differentiated, it's not new ground up Construction, Aia billing schedule values, an chart stuff, some of that.

PHONE CALLER #3

4:47 You, you will.

PHONE CALLER #4

4:51 See. Okay?

PHONE CALLER #3

4:51 And, that is in your accounts that.

PHONE CALLER #2

4:54 Yeah, we see that mostly like some of our it.

PHONE CALLER #1

4:57 Okay. But the bulk of your projects, it sounds like doesn't involve a lot of, okay, perfect. So we're, in our capabilities. We're doing, you know, projects anywhere from a few weeks to six months.

PHONE CALLER #1

5:09 We'll say you've got to break it into phases. You got a Progress Bill, manage a budget whip, reporting, manage change orders that's our wheelhouse. And, we call that service project under the service umbrella because all of our customers are doing some level.

PHONE CALLER #3

5:23 Everybody's speaking, the delineating difference is that you were working for the...

--- Type of work ---

PHONE CALLER #4

5:32 Owner, yeah, one.

PHONE CALLER #3

5:33 On a project?

PHONE CALLER #2

5:35 If there's a GC involved?

PHONE CALLER #3

5:37 You were set into the deal by the GC so the GC did not put a thumb on you for pricing or whatever, but the owner may want the GC to run everything just because they don't want to be in the middle of it, but they spec you.

PHONE CALLER #2

5:55 Typically to this anytime there's a DC involved regardless of what it is, it goes. All ours are with the...

PHONE CALLER #4

6:05 Yeah.

PHONE CALLER #3

6:06 That's what, we call owner project. And typical, if there's no GC involved, there's no Bill.

PHONE CALLER #2

6:12 Like our school is past, we just did some, we do it with them. They do have AI, but it's with the school district themselves. So it's not GC is actually again, but they're the only one that I know of right now that have that as a schedule.

PHONE CALLER #4

6:26 And we're...

PHONE CALLER #2

6:27 Doing some business with some other school. Does that not requirement?

PHONE CALLER #4

6:30 As...

PHONE CALLER #2

6:31 Long as it is capable or we get that information then because it is, yeah, it's not out of so many customers for right now that I've been aware of.

--- Type of work ends ---

PHONE CALLER #4

6:41 Okay, perfect.

PHONE CALLER #1

6:43 So, again, we know some information about you guys heard about you through alliance. So you're looking at now service trade, I believe BuildOps and sfo and you've had meetings with the other two already?

PHONE CALLER #2

7:02 Warm, yeah. Okay.

PHONE CALLER #1

7:04 Okay. Have you, are you planning to look at BuildOps?

PHONE CALLER #4

7:07 Like I've got, he set this up. I don't know.

PHONE CALLER #3

7:11 The only thing that aligns...

PHONE CALLER #2

7:13 Talked about was the asset.

PHONE CALLER #1

7:16 Okay. All right. They, they had mentioned three of them. So maybe I don't know.

PHONE CALLER #3

7:19 Know what's interesting about that is back alliance introduce us and they didn't point that up, they had. So Lance had one of their partners leave and go to fill up and they're very cozy with them. But I think they've had a number of reasonably high profile challenge which ends up challenging the.

PHONE CALLER #4

7:42 Yeah.

PHONE CALLER #3

7:42 So, I think, if they haven't brought enough, they used to be very cozy, they haven't brought it up is because they end up, they've had some problems for to.

PHONE CALLER #4

7:53 Yeah, you...

PHONE CALLER #1

7:53 Might...

PHONE CALLER #3

7:54 That, that was here because.

PHONE CALLER #1

7:57 Well, it was in the documentation that's what I forget that Mike, I think is his name. Yeah, that's what he had mentioned, but you...

PHONE CALLER #3

8:04 I don't manage.

PHONE CALLER #1

8:06 You might have dodged a bullet there. So that's as much as I'll say, but yeah. Okay. Well, then you guys have seen sfo then? Already? Okay, cool. Sfo, I think is like the new and improved SSO. I think they did it one of the stages famous tricks where they rebranded rename it that's probably the easiest to sell against that's. A good example of kind of an afterthought from an accounting vendor.

--- Accounting integrations ---

PHONE CALLER #1

8:29 You know, that their wheelhouse is accounting, but some of their customers do service. So it's like let's come up with this kind of afterthought bolt on don't put a lot of R and D into it.

PHONE CALLER #3

8:38 It came through. But a lot.

PHONE CALLER #2

8:44 It's no better than what I'm...

PHONE CALLER #4

8:44 Doing, correct? Yep.

PHONE CALLER #1

8:46 Correct. So usually the strongest thing people cling to is the integration with the accounting system. But the caveat to that, is, it can't innovate it's. It's relying too much on the accounting system. So that what you see is what you get and it's what you're going to have for a long time. So as far as feature wise, it leaves a lot to be desired. And it's very easy to sell against. So another question for you guys. What is, what does the timeline look like? I mean, this is a popular time of year for mechanical contractors to be looking at software.

--- Purchase decision ---

PHONE CALLER #1

9:15 Things are about to slow down. So it's a good time to implement. Have you guys given any thought to when you'd want to begin implementation or be live with something like this?

PHONE CALLER #4

9:24 So.

PHONE CALLER #3

9:24 He just laughed. So now I... in my opinion, it is for far too aggressive, but he would be...

--- Purchase decision ends ---

PHONE CALLER #4

9:36 To be live... this.

PHONE CALLER #1

9:40 Fiscal years... that is just for service. Okay? That's a different story.

PHONE CALLER #3

9:48 You guys are accounting package for service and then swallow Construction some point in, right? So basically, yeah, bring service.

PHONE CALLER #2

9:59 And then...

PHONE CALLER #4

10:00 You...

PHONE CALLER #1

10:01 Can close but you can.

PHONE CALLER #3

10:04 Do that?

PHONE CALLER #1

10:05 And well, I mean, if this ends up being the, you know, something that you see value in, then we'll move at your pace. We'll move is we won't be the ones to hold it up but you're probably right on the cost. I would say, I think we'll get into this later, but I think October fifteenth is like the soonest service one.

PHONE CALLER #3

10:20 So, how many, how big the service? How many technicians or something? Well, but I mean, really?

PHONE CALLER #3

10:33 Basically.

PHONE CALLER #2

10:37 No, no, I don't think, I know... two, two things. One, everything that's live. Now, we just do like, we're not gonna.

PHONE CALLER #3

10:47 Yeah, you.

PHONE CALLER #2

10:49 Yeah. The only, the only thing we made we bring over, we had a project that was booked in and it's gonna be two or three years regulate.

PHONE CALLER #3

10:58 Yeah, right.

PHONE CALLER #2

11:01 So, if we have 45 tests here in this building that actually goes out and service our touches, we have some across the park and a lot that they're not servicing customers who are working for destruction, but they report under our umbrella.

PHONE CALLER #4

Okay. Yep.

PHONE CALLER #1

11:17 So, they wouldn't be considered part of this.

PHONE CALLER #2

11:19 They would be considered like we build their own little team and put them in the...

PHONE CALLER #4

11:25 If we.

PHONE CALLER #2

11:26 Ever utilize them, then they could report to all the reporting through the system because they're already in there, like our mechanics are, but they don't report to us. We don't schedule them out. We don't dispatch them. They do, that is if there's so on working with a.

PHONE CALLER #4

11:41 Yeah. Okay. That makes sense.

PHONE CALLER #3

11:43 You guys are a union shop. Yes, you got this. Okay. And so you got msa member can?

PHONE CALLER #4

11:53 Yeah.

PHONE CALLER #3

11:54 Yeah, we can put you in touch with them. We got, we've got a very strong relationship with that group doing well.

PHONE CALLER #2

12:01 Yeah, we do. Yes, we, and then most of, the local union reps they use work here. Okay? So we kinda, yeah. Okay. That works.

--- Purchase decision ---

PHONE CALLER #1

12:17 Awesome. So, where are the problems? Sounds like a better understanding of the timeline decision making process? What about that wish list? What are, what are the burning desires that you guys have for new service management software? What are the rocks you're looking for? I don't know if that's a short list or a long list but.

PHONE CALLER #2

12:38 It's I mean, everything is dispatch from dispatching down to billing creating report is, you know, technician skill sets, inventory to company, the top one because of our recent and tracking, you know, EPA.

PHONE CALLER #2

13:03 Yeah, that's a big.

PHONE CALLER #3

13:05 Concern right now. Do you need to do that for your customers or is this just for the EPA?

PHONE CALLER #2

13:12 In terms of manifest, no, you do it all the way down to a circuit on a?

PHONE CALLER #3

13:21 No, it's coming. We haven't...

PHONE CALLER #2

13:22 Yet. Seen that.

PHONE CALLER #3

13:24 The thing, but yeah, the compliance we.

PHONE CALLER #2

13:29 Yeah. So I have to go down all the way down to it.

PHONE CALLER #1

13:45 That, that just kinda internal, but that might be one of the remaining use cases for service.

PHONE CALLER #4

13:51 Forms...

PHONE CALLER #1

13:52 Closest we can come.

PHONE CALLER #3

13:54 I...

PHONE CALLER #3

13:58 Have been saying this for some time, my company and this type, I think if we escalate into a top here, another one, for example, we're so two, right? From that coming next year, right? That hit the threshold with where we got to deliver, right? My view is that this like thing, is one of those gonna be, we have ways of doing it now. Calling it a bit of a clue. Would be... generous. You can do it, but I'd be pretty much work in the back end.

--- Assets ---

PHONE CALLER #3

14:42 This just, we're one of the only companies that tracks asset history down to even a subset. We're like that. We're like V1 in the market that does that. So refrigerant should be an attribute of the asset circuit, which is a sub asset under a particular system. And that should just be built in that. Hey, I put refrigerant in. Okay? Because I know it went in, right? And there's the follow up that says, okay, this is my refrigerant went in which asset, and then they gotta burn that down across.

PHONE CALLER #2

15:22 Gonna even get down to the point to where, if customer calls in and says, you know, I'm a.

--- Assets ends ---

PHONE CALLER #3

15:29 We go out, we determined the lead don't know how much came out.

PHONE CALLER #2

15:33 You gotta test that, but then you also do 30 days later, you have to go back and verify that for a... anything that's in the atmosphere, not only are we liable. So as the owner of that, so we have...

PHONE CALLER #1

15:53 Sound like file safety?

PHONE CALLER #2

15:54 So, I mean, Johnson is one of our partners. We do a lot of business with them and they came in and did an actual class, and they brought in... the manufacturer of the recruitment cylinders and came in and said this is what the, is requiring from us. So going forward, this, we're requiring from Johnson five on like this, what we're gonna require from all our customers all the way down because now it's EPA can track every recruitment cylinder by a barcode.

PHONE CALLER #4

16:25 So...

PHONE CALLER #2

16:26 If they come in and say, I need your recruitment tracking records in mind, them, we mind pull our doors because see us, we're gonna be.

PHONE CALLER #3

16:35 We for drive their workflows, the data that they have, and everything else. And this is just.

PHONE CALLER #2

16:45 You...

PHONE CALLER #3

16:47 So hi one is the one, it looks like it's right there.

PHONE CALLER #1

16:54 There we go. We're we're live.

PHONE CALLER #2

16:56 But yeah. So that is going to be, that is something that we're going to invest into a new platform. We will be there because it could be tomorrow, is an effect and we have to start doing it. And I go, that is a, big.

PHONE CALLER #3

17:12 You heard it first here by February. Yeah, that's just work. Do go back. Like I said, I arguing this for a while, I've never heard anyone stated as assertive as you did that. I.

--- *Forms* ---

PHONE CALLER #2

17:24 Well, I worked in a system, Johnson controls on system where it did, it tracks down to the circuit. And they had so many things in place where you have to answer before you go to the next step and filling the box, filling the blanks. And so it's just something like, if they did it. And now we're getting word from our suppliers that is coming. You guys will get, yes.

--- *Type of work* ---

PHONE CALLER #1

17:52 Yeah. Well, and, he made a good point. A lot of, a lot of service management software started in residential or was built with residential in mind. And then they kinda work their way over to commercial service. Tighten is a really good example of that. They're fantastic for residential. They're just not even close on the commercial side service tighten.

18:15 I really don't want to sit on but.

PHONE CALLER #1

18:19 Yeah. So not bashing them, we have lots of customers come to us doing a lot of residential and we say, respectfully, it's not a good fit. We were designed for commercial, try service tight, and they're fantastic at residential that being said, they're trying hard to push into the commercial space. We've got an eight year head start on them and, you know, we've had customers.

--- Type of work ends ---

PHONE CALLER #3

18:39 Then how they track assets, just watch it and they'll say, all right, we're out and...

PHONE CALLER #2

18:44 I'm almost tempted just, I just have a conversation with them. You know, that I really don't want to waste my time, not be respectful.

PHONE CALLER #3

18:52 Cool the back now.

PHONE CALLER #2

18:54 The last minute, they.

PHONE CALLER #3

18:55 They are a big, huge, successful company, right? We've got a relationship with them. We refer residential folks to.

PHONE CALLER #2

19:03 Okay.

PHONE CALLER #3

19:05 And, you know, because of where they are in their life cycle, they would love to buy us to figure out, we're not ready. We're not interested in that offer any time. So, but we do maintain a very cordial relationship with them and we just stick around.

PHONE CALLER #2

19:21 And every time they try to come in.

PHONE CALLER #3

19:23 On market because, they don't have the data model that is our market to try, but it's hard to ship that big with their data model. It's hard for them to adjust because they want to be able to sell the same thing.

PHONE CALLER #2

19:37 Yeah.

PHONE CALLER #3

19:38 Just does not work for commercial.

PHONE CALLER #1

19:40 That's the point I was ultimately getting to is success in the commercial space as it pertains to software, starts in the architecture and the fact that we have a concept of an asset, which is what I'll show you in here is why our customers gravitate toward our platforms.

--- Assets ---

PHONE CALLER #1

19:55 We just understand your world. And so, having that asset architecture is what will make way for things like detailed refrigerant tracking like that. So, if you look at any system that doesn't have that or they have the concept of an asset, but it's more like a list form like, yeah, we've got the equipment list at the site that's not what you need and that's not.

--- Assets ends ---

PHONE CALLER #3

20:12 I work for is the primary, then we orient around the asset and the service requirements as the primary. Okay? And then work orders just get created based upon a need to deliver service against an asset.

PHONE CALLER #4

20:31 Huh. Yeah.

PHONE CALLER #1

20:34 So a little bit of background on us. I'll try and fly through here. And, I did not plan to be up at the front of the classroom being like a teacher talking at you. We really want to keep this like a conversation the whole time. But as I mentioned, so, we actually just celebrated our tenth birthday and from the get go, we've been focused on commercial service contracts. All we're ever gonna do it's all we ever have been. So, you know, we're not going to have to residential, but we focus exclusively on firing life safety and map contractors, more specifically the M and map. So we're not doing landscapers, locksmiths, any of that stuff. And basically we were here's some of our stats here in business over, we actually have over 1,300 live accounts, 10 percent of us commercial industrial building service, seven point 5,000,000,000 dollars going through our system. And we're here to address one of the big problems

that you guys face in this industry. And, and that is the fact that there is a 40 percent skilled labor shortage as we talked about already is you can't just go pluck them off, of a tree. And that gap is getting wider by about eight percent every year. As your season vets are retiring, fewer newer techs, are coming into the space. So it becomes paramount for you guys to optimize your constrained resource. When you're looking at technology as an investment standpoint, you want to be investing in that technician, reducing administrative burden, getting as much output, getting them to as many billable hours.

--- Customer engagement ---

PHONE CALLER #1

22:03 And so you need software that makes it easy for them because if it's not easy, they're just not gonna do it right? So that's why service trade is designed to help you guys control costs by improving your service and project operations, setting your technicians up for success. And then in turn help you guys grow quality revenue by helping you sell more service agreements and win more projects. And also by helping you grow profitable customer loyalty. The loyalty piece I'm gonna key in on here quite a bit because a very big page out of our playbook is taking your service activities online to impress your customers, build trust, making it easy for them to see pictures, videos, audio memos, service documentation, because that's the stuff that keeps people around. But it's also a great way to attract new customers in the process. So you don't just want more business. You don't want more customers, you want the best customers and you get them by becoming a premium brand, become a premium brand by showing them how you're different. Not just telling them because everybody's saying the same thing, right? So breaking this down a little bit, improving your service and project operations. You know, simply put, this is about providing more real time visibility of service activity in the field, making it easy for technicians to access service documentation and details and history and just overall improving communication, allowing you to get more done with the resources you already have… setting your technicians up for success.

--- Access to information ---

PHONE CALLER #1

23:30 This is a big one. So a lot of mobile apps out there, they're just garbage. You know, either they have syncing issues. They don't work offline. They're cumbersome to navigate there's. A lot of things you gotta open to get to information. So service trade was designed to make that process easier, giving them detailed asset information in history.

--- Deficiencies ---

PHONE CALLER #1

23:49 So they don't have to call into the office for that and then making it really easy for them to capture pictures, videos, audio as in the field where they don't have to e-mail it or text it back again. If it's a homework assignment, they're just not gonna do it.

--- Deficiencies ends ---

PHONE CALLER #1

24:00 Whereas if it's really simple, they're gonna do it. But then this mobile app becomes one of the most useful tools in their tool belt. It's no longer that cumbersome homework assignment that they just have to tolerate.

PHONE CALLER #4

24:10 While they already are up on 110 degrees roof up. So.

--- Type of work ---

PHONE CALLER #1

24:16 Grow quality revenue by selling more service agreements and win more projects. This is something we won't have time to get into today, but just wanted to touch on it. Have you guys ever heard of a tool called Northboundary... so.

PHONE CALLER #3

24:29 Link contracting group?

PHONE CALLER #3

24:37 Commercial franchise. And we bought that was... originally designed and implemented for the link route and then get that.

--- Type of work ends ---

PHONE CALLER #3

24:49 Did that work left built his own or software shop to redo it in a scalable as way and effectively a figure price quote specialty application for selling projects and maintenance agreement in mechanical space, our lingo or your terminology or your take off, everything else is now already there for you. And it's I mean, when folks sell mechanical agreement, if they're like, yeah, now, it's also a lightweight CRM, so, do you guys have any dedicated sales staff on the?

PHONE CALLER #4

25:29 Yeah, no.

PHONE CALLER #3

25:31 Are on the list, you have any dedicated sales people selling service contract? Yeah. So if you do what tooling are they using?

--- Accounting integrations ---

PHONE CALLER #2

25:42 Excel?

PHONE CALLER #4

25:44 Yeah, yeah.

PHONE CALLER #1

25:44 It's common.

PHONE CALLER #3

25:45 They'll they'll love this and it's reasonably cheap and it connects to service trade. So the point is conversation.

PHONE CALLER #1

25:53 Yeah. Regardless of what you guys do with the service software, if you're interested in growing and getting the best customers, you're gonna want this. Anyway, the good news is the upside is it's it has an integration with service rates.

--- Accounting integrations ends ---

PHONE CALLER #1

26:04 So basically, once you go out and experience that sales success, and you're bringing in all these new maintenance agreements through the integration, you'll be able to pump in the equipment, the tasking, the pricing contract terms, and you'll be able to go out and execute on it through ServiceTrade.

--- Customer engagement ---

PHONE CALLER #1

26:18 So further eliminating the double data entry. And then lastly, as I talked about, I'm gonna be showing you examples of this throughout the demonstration, grow that profitable customer loyalty by creating an experience that they're gonna remember, right? We have a saying if the only thing you ever send the customers the invoice, the only thing they're ever going to talk about is price. So service trade is designed to make it easy for you guys to tell the story of the valuable work you're providing for their equipment and their facilities, you know, it builds trust. But again, they're not getting that from the competition. So if they get an online quote repair quote from you guys and it's got pictures of the issue and it's just clean, they can approve it online. That is a hassle free experience. That makes it easy for them to give more money to you guys. Whereas the next guy is sending them something, they have to print, sign, scan and send back to them. Doesn't have any pictures. You know, there's a lot of questions around it that is a memorable experience.

PHONE CALLER #3

27:09 You can't turn it around quickly. In other words, the faster you turn around a up fit repair improvement recommendation based upon your maintenance... cycle, if it takes you 30 days or 60 days to turn it around, how important would it be if you're turning around in a day?

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

27:31 Two days with photos attached? Gee that I just saw the impairment yesterday and the work acknowledgement I signed, and they came to me online. And today, the quote for remediation is in my inbox to approve and with the same photo all of a sudden. And then when they don't approve, when you Chase them a little bit and they don't approve one or two and then fails in the cycle.

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

PHONE CALLER #3

27:56 And then their price is twice what it would have been on planned return, start training. When I send you something to up fit to fix, you need to click, yes, you need to click green because if you don't it's a problem for me and you because now I got to expedite or I gotta have overtime labor. I didn't need to be this one.

--- Customer engagement ---

PHONE CALLER #4

28:22 Yeah.

PHONE CALLER #1

28:22 And we'll talk about that. When we get into the quoting section, if I had to boil this slide down, what I loosely refer to this as is becoming the Amazon prime of your market, becoming the easiest company in town to do business with, taking all the stuff online. So they don't have to make calls, maybe it's our customer portal through your website where they can log in and see all the service history. They can ask for service on there. They can access all their outstanding quotes. But that's the stuff. Customers will gladly pay a premium.

--- Customer engagement ends ---

PHONE CALLER #4

28:48 That we do a.

PHONE CALLER #1

28:51 That, is that appealing to you?

PHONE CALLER #2

28:53 It was, yeah, no one's told us that because I mean, I don't know any other software.

PHONE CALLER #3

28:59 Okay. Its own special category thing. And we, fortunately, we the owner that he was a good time for himself. We pick.

PHONE CALLER #1

29:13 We're talking about the customer portal.

--- Customer engagement ---

PHONE CALLER #1

29:15 Yeah. And I'll show you more online engagement to help those customer relationships. So we go ahead and dive into the platform. I'm gonna be showing you three views of service rate. So we're gonna start in the office and then we're gonna go out in the field, take a look at the mobile app. And then as I mentioned throughout the demo, I'm gonna be sprinkling in some customer facing view, so you guys can see examples of correspondence your customers receive. If you did visit with them through.

PHONE CALLER #3

29:40 Rate your e-mail...

PHONE CALLER #1

29:42 I did, I got Tommy and Nate and I got a few others that are not in the room.

--- Customer engagement ends ---

PHONE CALLER #3

29:48 Okay.

PHONE CALLER #1

29:56 Is there a thermostat here... awesome?

PHONE CALLER #3

30:01 You sweat that there?

PHONE CALLER #1

30:02 I am, I didn't bring enough water either. I see a fridge.

PHONE CALLER #1

30:11 Hey, Tommy, I feel terrible even asking but is there any chance that there might be waters in that Forge? Don't go downstairs that's quite, all right? Only if it was convenient.

PHONE CALLER #1

30:27 No, no, no, no, please don't.

PHONE CALLER #4

You say I'll go over to?

PHONE CALLER #4

30:45 Okay.

PHONE CALLER #1

30:47 Yeah, it is kinda weird to be at a mechanical shop in the HD not working.

PHONE CALLER #1

30:54 Ain't that the way it works. All right. So we're gonna start in the office all right now when the office signs and they're gonna land it what we call the service dashboard. So, I want you to think of the dashboard as home base. It's basically a high level overview of the different stages of your workflow. So, at the top here, we've got the daily schedule. This is the list of work orders going on today. Not to be confused by the dispatch board because we got one of those two. Just a list of who's doing what, and where, underneath that, we have overdue jobs without appointments. By the way in service trade, we refer to work orders as jobs. I know that's usually associated with projects, but this is overdue jobs without appointments. This is stuff that's slipped through the cracks on us. So that's priority number one. We've got jobs without appointments do in the next two weeks. So this is the stuff that's about to slip through the cracks if we don't stay on top of it.

PHONE CALLER #2

31:46 Appointment, you're mean schedule?

PHONE CALLER #1

31:48 Correct. Exactly.

PHONE CALLER #3

31:49 Exact needs to be assigned and scheduled, okay?

PHONE CALLER #1

31:53 And then we have past jobs to be marked complete. So, these are all the tickets that the technician has closed out in the field. It now just goes into this review bucket for a service manager or somebody in the office to look it over before passing it onto billing. And then lastly, we have completed jobs to be invoiced. So, you see it's kind of this assembly line format. And the whole purpose of it is to provide you with that immediate and convenient visibility. As soon as you log in, you can look this stuff up with a bunch of different reports using a plethro of different filters to quickly drill down and find what you're looking for. But this is a matter of convenience in being hit with your priorities first thing in the morning. When your, what do you have in mind?

PHONE CALLER #2

32:30 Cause I go down now.

PHONE CALLER #2

32:37 Schedule and the overdue...

PHONE CALLER #1

32:41 Schedule and the overdue jobs.

PHONE CALLER #2

32:44 Like like a three dispatches. So if I gave, again, if I give somebody all of them right now, the current?

PHONE CALLER #1

32:54 Sure.

PHONE CALLER #2

32:55 That's not mine is mine. I don't know what's mine. I don't know what I'm looking at a.

PHONE CALLER #4

32:59 Yep. So.

PHONE CALLER #2

33:00 I would like to say, okay, here's, dispatchers or roles and responsibilities. Well, you only get this and.

PHONE CALLER #4

33:05 Yep.

PHONE CALLER #3

33:06 So, my guess is that they'll log in and they'll immediately leave this page for a different page, which is either a dispatch board or a jobs list with their saved searches. So they say the things that they're interested, for example, show me everything where parts arrive as are complete. So I can send, they can, that can be a save search for that.

PHONE CALLER #2

33:34 They create their own.

PHONE CALLER #3

33:36 Create their own.

PHONE CALLER #2

33:37 Customize in.

PHONE CALLER #1

33:39 So, so the dashboard is, it's a fixed, just the position of the information fields. So you can filter them based on certain job type service line. But what Billy is talking about is actually way more useful and it's something they can customize very easily. So this is an example of a jobs report and they can use any of these filters. So like what Billy said, I wanna see all jobs with parts, all parts received so that one's ready to go out. Or maybe I wanna see, you know, for certain technicians, maybe I want jobs by a certain status and there's even one that is overdue or you can put in the due date right here. So there's lots of options and then when they leave this screen... so so they can bookmark this. And when they come back to it, all those filters are saved.

PHONE CALLER #3

34:22 There all this being all, this is all being rewritten but, I have a place so they'll be able to save.

PHONE CALLER #4

34:38 A simple in.

PHONE CALLER #2

34:39 That would be.

PHONE CALLER #4

34:41 Correct.

PHONE CALLER #4

34:49 No, I auto and put it on. You get back on auto.

PHONE CALLER #1

34:55 You're the best. Thank you. Nice. So to give you an idea of where all this information is located. We've talked a lot about data model. Let's take a look at that.

--- Recurring maintenance ---

PHONE CALLER #1

35:06 I think that colors it in. So again, because we were designed specifically for commercial service contractors, we know how important it is for you guys to distinguish between that Bill to, and ship to address, right? So, for example, a lot of your customers are a parent company, corporate headquarter, which is what we see here at the kroger co. But underneath them, we're responsible for servicing six different physical locations. Each physical location has its own designated page and this is where all the information for that one location is going to live. For starters. This is where we can set up our service agreements, right? So think of this as a set and forget. So you, when you win that agreement, you come in here and you set up the scope of work to be done, which equipment it pertains to, you can give it an estimated price, estimated duration. How often it recurs whether that's monthly, quarterly, semi annual, and you can even have custom frequencies in there.

35:59 You're not, you can't set that up at one time when you, your...

36:07 Yeah.

PHONE CALLER #1

36:08 That's what you do when you book the contract, you set it up once and so say it's a quarterly that you want you set up one of these quarterlies, and now it's gonna recur and it's gonna create exactly.

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

PHONE CALLER #1

36:20 So that's my point is a lot of systems out there require you to put in a bunch of future work orders like create four of them. So if something changes or moves like now, you have to go into like void out the work order whatever and create a new one so it can get messy. But this...

--- ST app contracts and pricing ---

PHONE CALLER #3

36:33 This point is that we store the contract frequency and the contract method in terms of labor and parts independent of creating a future work order language that should.

PHONE CALLER #2

36:44 Well, while we're on agreement, we ask, is it's...

PHONE CALLER #1

36:49 Of course.

PHONE CALLER #2

36:50 So, I'm assuming, when you create an agreement, it gives you a number you something system gives you some.

PHONE CALLER #1

36:56 For a work?

PHONE CALLER #3

36:57 Order contract number?

PHONE CALLER #4

37:00 Okay. Got you.

PHONE CALLER #2

37:02 If I sold a three year contract, I'm gonna book the contract for year one.

PHONE CALLER #3

37:11 Well, booking very often as an accounting pure. You say you're gonna book it for year one. What do you?

PHONE CALLER #2

37:16 I'm going to create my contract in the system that tells me I sold this contract for 2000 dollars.

--- Pricing ---

PHONE CALLER #2

37:24 I have four quarterly inspections at 500 dollars a piece. So to me that's bookie, my contract has nothing, account, bookie, my contract in the system?

PHONE CALLER #3

37:35 You would enter all that information in the system? Yes. And it's easy to enter it in.

PHONE CALLER #4

37:39 My...

PHONE CALLER #2

37:40 Next question is say we get done with year one now onto year two. Does it automatically renew? And if it automatically renews that year two, does it give it a different agreement number or agreement number with a dash two? Or how do you differentiate between the first year and the second?

PHONE CALLER #3

37:56 So...

PHONE CALLER #2

37:58 So, for some...

PHONE CALLER #1

37:59 Well, he's yeah, we're both here for you.

PHONE CALLER #3

38:02 So, so there is a contract. If it automatically renews, there's no different number than it's just the set same.

PHONE CALLER #2

38:12 Okay. So let me ask her... out after I got completed year one, I renew your too and complete your two. Now, where do I go to see how your two executed from your one?

--- ST app contracts and pricing ---

PHONE CALLER #3

38:27 I think essentially is how did we do on this contract in year two versus year... pack? So underneath that contract, you'd have generally speaking, three different types of revenue and three different types of costs. You would have a set of maintenance revenue, right? Or the maintenance visits and maintenance costs.

--- Type of work ---

PHONE CALLER #3

38:48 So those are your maintenance jobs. Then you would have a set of pull-through... so pull-through work where you sold incremental projects to them based upon things you found and your maintenance. So those are planned repairs planned up. Then you'd have a set TAM or orders. So all three of those would be three different categories.

--- Pricing ---

PHONE CALLER #3

39:10 It will show up underneath that contract with invoices dollars, revenue and cost. So you'd be able to see your cost to see your gross mark and those three buttons a year, one, year, two, year three, you can break it. You can break it any way you want four, one, four, two four, three year one year two, year three, all the data?

--- Pricing ends ---

PHONE CALLER #4

39:35 Yeah.

PHONE CALLER #1

39:35 So you...

PHONE CALLER #3

39:36 Have that data in here. We show an example of that.

PHONE CALLER #1

39:40 Not an example of that breakout but I can jump right to an example of our reporting.

PHONE CALLER #4

39:47 I was like, yeah.

PHONE CALLER #2

39:51 That's very important to us.

PHONE CALLER #3

39:52 Yeah.

PHONE CALLER #1

39:53 So, because here's what it boils down to service trade is the receptacale for all this information.

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

PHONE CALLER #1

39:58 So it's all living there. The goal is then getting that into some sort of looking glass like a BI tool. So if you guys are already using one, you can use that. The one we recommend is quick site and then you can create your own custom dashboards. So I have actually on here, this, I don't think this is broken out by date, but again, you can do it by day. These are canned dashboards we develop just to kinda inspire the imagination. And this is one that I don't show a lot. So I might fumble through. And why is it not giving that password? I was just.

PHONE CALLER #3

40:30 In there... so well to give the more detailed answer, we looking for example, we take all of your data and normalize it into a red ship database at Amazon Redshift, Amazon data warehouse technology, you can use quick site we support.

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

PHONE CALLER #3

40:51 And we automatically look at it before you can point anything you like that, and we give you the mapping of it. So included in that mapping in contracts, jobs under contract, invoices, under contract items and cost one contract. So you can build whatever you want. All that data. Is there?

--- *Accounting* ---

PHONE CALLER #2

41:15 This is basically.

PHONE CALLER #1

41:16 Correct, correct. But the idea is that you have your date, you have the profitability, you have the cost, you have all that stuff associate, all the ingredients are there? It's just pointing it and then developing the...

PHONE CALLER #3

41:26 You give me an idea, there's multiple dimensions associated with the different trade. You said you're gonna have a controls trade, right? You can have control.

--- Recurring maintenance ---

PHONE CALLER #2

41:38 Yes.

PHONE CALLER #1

41:38 Controls?

PHONE CALLER #3

41:39 Services, you can have... mechanical air, conditioning services. You may have another type of services, only different services and you can group.

PHONE CALLER #2

41:51 Under those services?

PHONE CALLER #3

41:53 You might have to come up with some rules if you're billing the customer once put revenue under those services. So, for example, if you're going out and at the same time you're doing a controls, M and a, you know, a chiller, PM or whatever those are under different service categories, they could be under one work board or one job, and the cost will line up underneath the services.

--- ST app contracts and pricing ---

PHONE CALLER #3

42:16 The revenue generally gets bucketed as one invoice to the customer, unless you break it up, right? And so, so there there could be some work for...

PHONE CALLER #1

42:26 Do...

PHONE CALLER #3

42:26 On rules about how do I get revenue?

PHONE CALLER #1

You?

PHONE CALLER #3

42:29 Out of a single PM where I was doing multiple service, but...

PHONE CALLER #1

42:34 Multiple...

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

PHONE CALLER #3

42:34 Job types, there's even maintenance, there's, service, emergency service. And, and there was also plan repairs, blah, blah blah. So all those dimensions allow you to slice the data and, with whatever reporting tool you want to give you the reports, you.

PHONE CALLER #2

42:54 Okay. Does.

PHONE CALLER #1

42:55 That answer your question. All right. That's a good question too by the way, because we're big fans of if you can't measure it, you can't grow it. So we care that our customers care about metric.

PHONE CALLER #4

43:04 Yeah, I...

PHONE CALLER #2

43:06 Like, I totally, I'm not a counted I'm not and financials and stuff have been so great to my head over the years that I'm like one step over a slide in.

--- Recurring maintenance ---

PHONE CALLER #1

43:17 Don't don't join the dark side.

PHONE CALLER #4

43:21 To me to be successful, I know my business to run.

PHONE CALLER #1

43:26 100 percent. Absolutely. So the idea here is that you're going to have all these services locked and loaded on all your location pages, which is gonna allow you to forecast your work for an upcoming month so you can go into service opportunities, which is a report for just that where you run a report, say, I wanna look at all of my H

back work for the next two months, hit search. It's gonna come through all your location pages and it's gonna extract a list of services that meet your search criteria, which is then going to allow you to a bulk create hundreds of detailed work orders with all this Rich information about the scope of work, the equipment, the location, even the technician that's all gonna populate all those work orders that are then locked loaded and ready to dispatch out to your text.

--- Recurring maintenance ends ---

PHONE CALLER #1

44:06 So you're not having to go through each work order and prep up an information packet to send to your technicians. They're going to have everything they need to go out.

PHONE CALLER #4

44:13 Is that something that automatically does? Okay?

PHONE CALLER #1

44:16 So, well, I wanna be careful about automation. So, there are a lot of systems that auto generate work orders without you going in and clicking the button by design.

--- Recurring maintenance ---

PHONE CALLER #1

44:24 Ours doesn't do that because we don't want you to unintentionally fill your system up with work orders that you may not execute, right? So once a month, when you're forecasting, you run that report, click the button to create the jobs. And then they're all set for the next month or two however far?

--- Recurring maintenance ends ---

PHONE CALLER #4

44:40 For some.

PHONE CALLER #2

44:40 Someone didn't click the button. Is there somewhere that tells you, hey, you skip this, yeah?

PHONE CALLER #4

44:48 Pretty.

PHONE CALLER #1

44:49 So you'll be able to see overdue services in fact, these right here on the location page. This is my demo account. So I'm not staying on top of all my services but they're marked red because I miss them.

PHONE CALLER #1

44:58 So you can get visual indicators on there as well. Yep. So you'll notice that each of these services also has an asset or an asset group associated with it. Well, that's the other information again that we track at the location level. So I've got a walk in cooler a walk in freezer, and I've got a group of five rooftop units where we have that parent child relationship. So if I wanna see the units that make up this group, I show the sub assets. And now I can see each individual unit, make model, serial number, belt size, belt type, quantity, refrigerant type. All that in fact, because it's built into our architecture. If I click on one unit, it has its own designated page. I just drilled even deeper. And now I can see more specifically each service that is associated with this piece of equipment... which there's none on this one. Apparently, I can see every work order ever performed on this one unit at this one location. I can see any repair ever found on this one unit, at this one location, same thing with any quotes for this unit. And I can also see things like, you know, schematics, blueprints, if there's helpful diagnostic documents, I want to attach, the tech will be able to access this in the field as well to kinda help them through the repair.

PHONE CALLER #3

46:13 This is, this is a unique part of our architecture. We began with the idea that customers have equipment, has service plans and schedules around it as history and ultimately all of that. And for example, they have risk condition that technician looks for. Really if you're doing a great, the first thing you should do on a service call is identify the piece of equipment that is failing, document or risk conditioning.

--- Assets ends ---

PHONE CALLER #2

46:41 You're gonna fix?

PHONE CALLER #3

46:42 It right now, go ahead and document this condition. Why is it so important as that data is going to lead into a future world where we're gonna take all that data across all of our customers. And we're gonna point machine learning and AI, and then we're gonna hand your sales people and your services people essentially the capital plan for your most important customers for next year.

--- Assets ---

PHONE CALLER #3

47:06 Saying these are your highest risk pieces of equipment based on what the data is telling us is gonna happen. Because what's happening?

PHONE CALLER #2

47:13 I ask, but if it did that?

PHONE CALLER #3

47:15 Well, it's...

PHONE CALLER #1

47:16 Not today, but it's up on.

PHONE CALLER #3

47:19 Got a data model in place already. It'd be interesting to see how many deficiencies people are for, but we've already got the data model in place of risk condition and repair history by piece of equipment through time. So we're able to then use that data to give you a way to go to your customer and say, if you put the data in, if you put the equipment in, and if you put the risk conditions in, and if you put the history in, if you collect history, you... G, these are going to be your problem next year. Let's get ahead of now. What do you?

--- Assets ends ---

PHONE CALLER #2

47:55 Yeah.

PHONE CALLER #3

47:55 And then, and then you do that a couple of times, they don't do anything about it and then start the machines don't win. And I'm not kidding you when I say we need to get ahead of this. Had we been ahead of, it would have saved me emergency or it would have saved you money. Because now you're on expedited parts, overtime labor. We could have just knocked it out in February and we would be sitting here in August with a bunch of failures on. Yeah.

PHONE CALLER #1

48:23 And, if you have a system that doesn't have that kind of architecture, you'll never get access to data that Rich and detailed. Yeah.

PHONE CALLER #2

48:34 Get on. Yes, and we have to filter data with.

PHONE CALLER #3

48:40 Yeah, you gotta sit service tickets to find all the risk condition that is, that's a miserable like, yeah, that's why we set everybody. Most important part of our architecture is recording risk conditions around particular pieces of equipment because that's ultimately, what's gonna tell you what you need to know? The.

--- Assets ---

PHONE CALLER #1

48:58 Exactly, right. So tracking all the assets in the Rich history on them. So the, what I just showed you to ask of you is kinda the micro to this macro. So now looking at the location page, of course, I'm seeing all of the work orders across all the

equipment, same thing with the deficiencies, the quotes. This is where you can have your pricing contracts associated with the location because you can have customer specific pricing. We'll get more into that when we start doing quotes and invoices. And then another cool little feature here is having site specific comments. You know, I think this is a digital breadcrumb trail. It's just an easy way to cut back on some of what we call the phone radio. You know, little things like tech calling in for parking access or they forgot a ladder because it didn't know the roof required it. But having this, it's gonna populate on every ticket that goes out. So your techs are going to constantly be informed... what questions you have about the location page or how that information is organized.

PHONE CALLER #2

49:56 I think I have any questions. How far? The only question I think I have is how far... like or not, but for assets. So I have a set of assets. I have, you know, 10, 20 years. We've been doing business 20 years. So all the is there and then we go to replace those assets, the old asset information. So say there like how far does your data or how far will your system keep record?

PHONE CALLER #1

50:21 Good question. So it's cloud based.

--- Assets ends ---

PHONE CALLER #1

50:23 So it's unlimited storage, right? And I'm glad you asked that because you cannot delete assets in here, you can only deactivate them. So they disappear from all your searches. It's as if they don't exist. But if you have a customer come back or there's a reason to look back and see what they had.

--- Assets ---

PHONE CALLER #1

50:38 Previously, you're going to be able to see all those assets. Yep. The other cool thing about assets here is they stay with the location. So if one of your company locations get gets bought by another company, then you can swap it under that Bill too. So you still have all the Rich history.

--- Recurring maintenance ---

PHONE CALLER #1

50:59 Good. All right. Well, let's get into some fun stuff. So, I have created a job AKA work order here for us to go out and do some quarterly PMS. We're in the office still. So here, we see the basic information. We've got the Bill to address the ship to address down below, we see the appointment details, we see what tech is assigned to this job.

--- Assets ---

51:20 And here we've got a quarterly PM on the walk in cooler, the walk in freezer, in the group of rooftop.

PHONE CALLER #4

51:27 And...

PHONE CALLER #2

51:27 You assign more than one set?

PHONE CALLER #1

51:29 Of course, you can in fact, I'll throw Billy on here and you can do this from the dispatch board Mat base scheduler.

--- Assets ends ---

PHONE CALLER #1

51:36 But as you can see, you can also do it directly from the job itself. The other thing that I'll point out here especially considering projects when we talk about that is kinda the architecture of a work order itself is if you think of the job as the menu, the services or the menu items, each individual service can be broken out into several appointments. So for example, if you have a project, a service will be like a phase like a demo, but then that might last a week. So you can have multiple appointments on that single service and you can have multiple technicians on that service. Then when you go to do your rough in that can be several days and you might have a different set of technicians.

--- Deficiencies ---

PHONE CALLER #1

52:13 So they're going out there taking pictures, adding parts, pieces, documenting what they did, and it's all going back to the same tickets. You got one record for that entire project. All right. So we're actually going to be coming back to this view after we go do some stuff in the field before I do any questions on the office view of the job.

--- Access to information ---

PHONE CALLER #1

52:32 Pretty straightforward. All right. Let's throw our technician had on will pop out to the field. And now we're looking at the mobile app. So mobile app is compatible with android iOS can be a smart phone, can be a tablet. And when the technician signs in here, we are looking at that same job. We were just looking at in the office. This was designed with simplicity in mind making it easy for the technicians to navigate and find the information that they care about versus just kinda like vomiting it all over the app. And then they have to look through a bunch of a bunch of stuff noise.

PHONE CALLER #1

53:02 But if they need to plan out for the week or the month, they can obviously scroll ahead here because there may be cases where they do that. But I've got it simple. We're just looking at today. We've got that one job there. And when I open this up, I'm gonna be presented with eight different tiles of information about the services I'm out there to do the equipment, the location before we get into that down here at the bottom, you'll notice these clock events. So there's a few different ones to choose from. One of the more popular ones is the in route. So this is where the technician can clock in route when they're leaving the office, maybe their house, the previous job, and it's going to track all of their drive time.

--- Customer engagement ---

PHONE CALLER #1

53:40 Okay? Now, going back to the online customer engagement. This is also where the technician has the option to notify their customer and let them know that they're on their way.

PHONE CALLER #1

53:54 If you guys have access to your e-mail on your phones, I'm gonna be getting some audience participation going on here, but I just sent that to you.

--- Tech On-site ---

PHONE CALLER #1

53:59 You can even pull it up on your computers. What that's gonna be? Is it's gonna be an e-mail that has your company branding at the top? Greco, mechanical. It'll have a picture of your smiling technician, a description of what it is they're going out there to do. And of course, that estimated time of arrival.

--- Customer engagement ---

PHONE CALLER #1

54:14 Now, this is important because it's adding value to your customer. They don't have to pick up the phone and find out where their technician is. But it also doubles as a marketing impression. So it's the same kind of stuff that Uber dominos door, dash, Amazon does to make their branding stick or more top of mind for their customers.

--- Customer engagement ends ---

PHONE CALLER #1

54:40 I don't know if you're pulling it up. I wanted to give you time before I moved on... slow. Understandable. You ever considered a Mac?

PHONE CALLER #1

55:05 Your thoughts on that? It tends to be a new trick for, the commercial industry?

PHONE CALLER #2

55:14 They send that, and then all of a sudden, they get redirect to, can you say, can you send something back? Your customer? Can they send something back?

PHONE CALLER #1

55:22 Good question.

PHONE CALLER #2

55:26 For rack stopping for launch, stopping for like.

PHONE CALLER #3

55:31 So it's easy to call a customer. You, there's contacts in there.

PHONE CALLER #4

55:35 Yeah, we...

PHONE CALLER #3

55:36 Got contacts and it's pretty easy to wherever, yeah.

PHONE CALLER #2

55:40 Okay. But I'm just saying once he says he's in route.

PHONE CALLER #3

55:44 Yeah, that's kind of a fire.

PHONE CALLER #4

55:46 Say...

PHONE CALLER #1

55:48 That's true. First time I've been asked that actually.

PHONE CALLER #2

55:54 Customers that are like you told me you're in a minutes ago, and they don't consider it, consider we're not going down the total road and we got stuck in traffic by 10 Wheeler and I had to stop real quick and get the card on the way scenario. And that's 45 minutes for by now. I got a good, I think I'm fine for you now.

--- Customer engagement ---

PHONE CALLER #4

56:13 Now.

PHONE CALLER #1

56:14 You said an expectation you can't deliver on?

PHONE CALLER #4

56:17 Like that... anywhere?

PHONE CALLER #1

56:20 Could be, could be, yeah. And that is also why it's not automated. It's not like when they click in route, it automatically fires off notifications. But if there's use cases where you feel good about it and confident, it can be a good opportunity to sprinkle behind you marketing impressions that make your brand stick.

--- Customer engagement ends ---

PHONE CALLER #3

56:35 I love Ignacio was just throwing my feet in the.

PHONE CALLER #1

56:38 Yeah, yeah. Exactly. That's the idea.

PHONE CALLER #3

56:42 The strange, the world that, you know, knowing what's going on as a well we had.

PHONE CALLER #2

56:49 Also, you have there's so many times we have a customer will, you know, do a service and then the Bill take him back like he was only on site for four hours and he charged me six.

--- Parts management (inventory) ---

PHONE CALLER #2

56:59 We're like, okay, did he use parts on your job site? Yes, he did well. He has to leave the parks house. That's part of the service ID. You know, we didn't just think we appear... so. So, yeah... they don't think.

PHONE CALLER #4

57:18 Sure.

PHONE CALLER #1

They don't they don't live in your world.

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

PHONE CALLER #1

57:21 Yeah. Well, thank you for asking that question. Let's say that we are now on site. Okay? We clock out in route service trade says, hey, you're ready to get to work. We are. So now it's keeping track of all of our time at this location. So getting back to these tiles, a lot of these are pretty self explanatory.

--- *Assets* ---

PHONE CALLER #1

57:37 So I'll just breeze through them. But services first and foremost is where the technician can see what it is they're out there to do on site... the equipment. So again, we're looking at the three assets that we're concerned with for this appointment versus the other 50 that exist on site. However if the customer pulls them aside and says, hey, can you also take a look at rooftop unit one, while you're out here? They're going to be able to see all the assets at that location. But again, just as we saw in the office, I can easily drill down into this unit. So if I'm standing in front of rooftop unit one, I can scroll down, I can see all the different specs for this particular unit. I can see any attachments like the spec sheets or the schematics there. But more importantly, I can see all the service history. So this, I'm looking at a chronological list of all past work orders ever performed on this one unit at this one location, which means I can open any of them up.

--- *Assets ends* ---

PHONE CALLER #1

58:32 I can see who was there, what they did, pictures, they took parts, they used. I can see their tasking sheets, all that stuff.

PHONE CALLER #3

58:38 Generally speaking though you'll find that you want one decision.

PHONE CALLER #1

58:41 He likes to correct me on that. I like showing all the information that's available. But he's right, a lot of times they're more to the point they wanna see what repair was found.

--- *Assets* ---

PHONE CALLER #1

58:51 So they can actually look at just the deficiencies discovered on that piece of equipment as well as the status of them.

PHONE CALLER #3

58:57 Chances or whatever is on now is probably.

PHONE CALLER #1

59:01 Correct. Now, this has to have been something that you guys consider when looking at software systems, tracking assets having that detailed history.

--- *Paper process* ---

PHONE CALLER #1

59:11 And if it hasn't what is, what are you seeing? Or what's the opportunity? Because there's a lot of reasons a lot of people give me, but what's the value you see in having that detailed asset history, right? At your technicians in?

PHONE CALLER #2

59:21 Fingertips is more efficient for one because right now, I don't know what they see on their back end, what we're using today. But a lot of times I got a call back to the dispatchers and dispatcher.

PHONE CALLER #1

59:35 They're not sitting around waiting for calls.

PHONE CALLER #4

59:37 No.

PHONE CALLER #2

59:38 They're not, but they're also not mechanically inclined either. So, so Joe may have went out the day before or whatever on the same asset. And the dispatcher is trying to decipher what Joe put in the system until this mechanic that's on site. Now that translation does not get communicated correctly right there, I see a value late is.

PHONE CALLER #4

1:00:00 Connect the dots in here. Yep love that. Yeah.

PHONE CALLER #1

1:00:06 So in that call is going back into the dispatcher, we hear a lot of calls are going back and forth between technicians. So you've got one highly paid asset stopping productivity to call another highly paid asset. So both, it's double the overhead for every little phone call.

--- *Pricing* ---

PHONE CALLER #1

1:00:21 And it doesn't sound like much but five, 10 minutes, handful of times a day over a week a month over the course of a year, you're potentially talking about thousands of dollars in overhead just in phone calls from a lack of visibility. So.

PHONE CALLER #4

1:00:38 I am on brand. Yeah.

--- Pricing ends ---

PHONE CALLER #2

1:00:44 They never go back customer calls and complaints. I got two people on this job. I pay for these two people, but yet their buddies and they want to help out. No, we see a lot.

PHONE CALLER #1

1:00:55 That's even worse way. Word. Dang. Okay. All right. Well then.

PHONE CALLER #2

1:01:06 I'm exposed to that from JC, I, because they're favorite program. So they had all this information but not here and not from the other couple that we.

PHONE CALLER #4

1:01:17 Awesome.

PHONE CALLER #1

1:01:17 Awesome. And, I stop here because I know this is one of our customers write about and they really appreciate because they're all commercial contractors doing what?

PHONE CALLER #2

1:01:25 Or built or you're building your system or enhance based on to mechanical built, which is great because without that builds, I don't have that customer. Without that customer, I have no revenue 100 dollars. So that's why I... relate to people that your mechanics. You've got to give them what they need to do their jobs. And you need... that should be your best friend at work... because without them, you really don't have a job. So, I mean, it should be your best friend, you need to give them everything they possibly can to do the job without having to stop to call back in or go search for some of their information somewhere else to complete that.

PHONE CALLER #1

1:02:06 If you are truly running this ship, you guys are going to be wildly successful, and I absolutely mean that because there are a lot of contractors who just don't get that and they do place a lot of administrative burden on their tech. What? No, we're not going to double enter po information. Let the tech do that. What? No, we're not gonna do this. The tech needs to be taken care of that, and it's just the wrong attitude losing.

PHONE CALLER #2

1:02:27 Playbook.

PHONE CALLER #2

1:02:32 Speak correct English or grammer, what maybe the concept in that?

--- Deficiencies ---

PHONE CALLER #4

1:02:36 Fix it on the back end. That's just.

PHONE CALLER #3

1:02:41 So...

PHONE CALLER #1

1:02:42 I'm gonna, yeah, I'm getting there.

PHONE CALLER #3

1:02:44 And type it out.

PHONE CALLER #1

1:02:47 Yep. So we'll jump right to that so you can have general job attachments on here. So if they come across a dent Ed panel door, they can snap a picture and they're not, it's not going to their camera, right? They're not having to e-mail or text. This is going right through the cloud, right through the app, right? So it's so easy for them to document this stuff. Maybe it's a before and after picture of a clean coil, you know? But the big place that this comes into play is what Billy is chomping at the bit to show you. And that is what we call the deficiency loop. So, the reason you're out there on that rooftop through your maintenance agreement is to capture, pull-through repairs. We wanna make that process as fast and easy for the technician as possible so they can funnel back.

PHONE CALLER #3

1:03:26 A...

PHONE CALLER #4

1:03:27 Lot.

PHONE CALLER #3

1:03:27 More pipeline.

--- Assets ---

PHONE CALLER #1

1:03:28 Of course, you can.

PHONE CALLER #4

With that asset.

PHONE CALLER #1

1:03:32 So, good question. So you can take it depends, right? So if the way I just did it, it's staying with the ticket because it's just a general job attachment. You can take pictures for the asset. A good example is taking a picture of the serial plate, right?

--- Deficiencies ---

PHONE CALLER #1

1:03:48 But what we're about to do is take pictures of a repair. So you don't want that permanently on the asset, but the deficiency record of itself is associated with that asset exactly. So you always keep that history, good distinction. So to make this quick and easy for the text service trades, gonna walk them through a few simple steps. So we add a deficiency here. First step is we just have to give it a name. So bad compressor is my favorite one to find. Okay, I don't have to do a bunch of typing out here because ServiceTrade has got a lot of better ways to do it. And we know technicians don't like to do a lot of typing or writing attachments. These are your best friends, right? So here we could take pictures, videos, you know, pictures worth a 1,000 words. You probably heard. One of our customers has gone as far as to say that a picture is worth a 1,000 dollars. And what they mean by that is when you start adding pictures to your repair quotes, the quota approval rating just shoots.

PHONE CALLER #3

1:04:41 Through the roof.

PHONE CALLER #1

1:04:42 And it's not really a mystery as to why, right? Because instead of telling them what you're proposing to do, you're showing them and some pictures might look so bad. They're like shut up and take my money, you know, a lot of your customers never even seen a condenser or a broken compressor. So the mere fact that you took a picture is like, well, crap, this is gonna be serious if they took the time to document this extremely compelling. So we can't stress that enough. But the other thing that they can do, another fan favorite is the audio memo. So instead of that technician up on that 110 degree roof doing a bunch of writing or typing, they can say, hey, just found a bad compressor. It's gonna take XYZ for parts already called the vendor and got pricing, check out the sheet attached. We're gonna want to get to this by Friday, whatever that narrative might look like, they can quickly capture it and keep moving. Next, we'll select the severity. And I'll also point out they're not typing in the severity they're selecting from a list that makes it easy. So this one is inoperable. But you can see here we have deficient suggested because we don't want them to just report the stuff that's already on fire. We want the stuff that's showing signs of wear and tear. So we can alert the customer to the risk. But in this case, it's bad on the asset. Again, we're not typing this stuff and we're not relying on them to get the model number right? Every time we're selecting from our database. In this case, it is rooftop unit one. And then what's the status new fixed or verified? And Billy made a good point. If you find a small repair that you got parts for doesn't exceed the NT E limit of the maintenance agreement. You still want a document that to show them the crisis you averted, but it also adds to that data pool that's going to help you be more predictive in the future. In this case, it's new because we got a quote it out. And with those few

simple steps in a couple of minutes or less that technician has now successfully reported that deficiency and pass the baton off to the office. Okay? Before we button this job up just to show you how fast that information travels. We're gonna pop back into the office. And when we're looking at the same work order and scroll down, we can already see the deficiency that technician just created. But, I can...

PHONE CALLER #3

1:06:45 It's something that needs to something that was new. They did fix. Somebody in the office who got the appropriate sales... profile in here, will receive an e-mail to say, hey, there's...

PHONE CALLER #2

1:07:05 Okay. So we can attach that site location.

PHONE CALLER #1

1:07:07 It's on the background. It's already happening. So they'll get paying. They might not even be in service trade. They'll get hit with an e-mail it says, hey, you know, new deficient opportunity and it contains this link right here.

PHONE CALLER #2

1:07:18 Yeah, but do you have to tell on where do you that?

PHONE CALLER #4

1:07:23 Do you mean?

PHONE CALLER #2

1:07:25 I send the e-mail to?

PHONE CALLER #1

1:07:26 So, you configure that? Yeah, because usually they'll have like their own account or territory. So, if they're associated with it, just the fact that the tech is at that site and reported deficiency on their equipment, it's gonna go to that person.

PHONE CALLER #3

1:07:39 Each customer or location can have a sales rep.

PHONE CALLER #2

1:07:43 More than one, more than one.

PHONE CALLER #1

1:07:47 So now I click that link, it's bringing me directly to the deficiency details that technician just documented. So with the few simple steps they took in two minutes or less, we now have an a in operable bad compressor founded the kroger San Antonio on rooftop unit one on this maintenance job. Down below, we can already

see the attachments that technician took for that deficiency. So they already have the pictures, the audio memo, all the details they need to do this quote. But because again we're tracking assets at the location level, they can also see things like deficiency history and they can see things like related deficiencies, what are the other problems we found on the same unit? Maybe it warrants a more substantial repair. Maybe we don't want to keep bandating this thing.

--- Quote templates ---

PHONE CALLER #1

1:08:33 So now you can make an informed recommendation for your customers and you look smart. So this is where the magic happens. All right. I'm gonna click a button. It's gonna start me to create a quote. If I'm already creating one for the customer, I can add this to that quote or I'll create a brand new one which is what I'm about to do. I can give it an expiration date if I want. And you guys are always going to be able to build these things out from scratch. So if it's a really unique repair or situation, I can go ahead and custom wordsmith my description in here. I can manually assemble my parts list right here. But a lot of times you guys might be quoting out relatively common place repairs, in which case, you have the ability to create your own configurable templates that you can then select from a drop down list. Okay? So these are templates our sales team came up with. They don't come with service trade. You wouldn't want them. You really want it to be in your own language. But just to illustrate the point, I'm gonna grab my compressor replacement Goodman template and what I do, it's gonna pre fill that scope of work and it's going to pre populate the items commonly associated with a repair of that.

--- Quoting ---

PHONE CALLER #3

1:09:37 It was the end, we replace a lot.

PHONE CALLER #2

1:09:42 Question, you run a report on all your outstanding.

PHONE CALLER #3

1:09:46 You sure can. That's a great question.

PHONE CALLER #1

1:09:49 You can even do it on deficiency. So if you want to see all the deficiencies that haven't been quoted yet, you can do that as well.

PHONE CALLER #3

1:09:53 I built, you can see, and he he's also got dashboards that show which text reporting, how many deficiencies, how many those deficient being quoted, how many of those being accepted? How many of those, how many dollars that?

PHONE CALLER #2

1:10:07 That would be nice for service managers. So, I...

PHONE CALLER #4

1:10:12 Yeah, yeah.

PHONE CALLER #2

1:10:14 Well, let me see what you're finding out there and what's going approved.

PHONE CALLER #1

1:10:17 100 percent 100 percent. You can do the same for the technicians and I'll show you that as well. In fact, I'll come back to this quote report in a little bit, but I like where your head's at.

--- Quote templates ---

PHONE CALLER #1

1:10:26 So, if this quote template isn't a 100 percent match, we're 80 to 90 percent of the way there. So let's say that we listened to the audio memo from the technician and they said, hey, this is gonna take four hours, not the usual too. Maybe it's gonna take a few widgets, we can slap those on there and you'll notice that ServiceTrade can house your standard costs in here. You can override any of this too, but it's gonna populate.

--- ST app contracts and pricing ---

PHONE CALLER #3

1:10:48 One of the prices on the unit pricing. What? So, what happens in the override unit, the unit pricing.

PHONE CALLER #1

1:10:55 Unit.

PHONE CALLER #3

1:10:55 Price? Yeah, the pricing, not the cost over, right? Charge the customer or it grows a little Warren a little yellow warning. Is it? Hey?

PHONE CALLER #2

1:11:06 That's...

PHONE CALLER #3

1:11:06 Fine. But...

PHONE CALLER #2

1:11:07 Like the contract?

PHONE CALLER #3

1:11:08 Price is this?

PHONE CALLER #2

1:11:12 Is yeah.

PHONE CALLER #3

1:11:13 We automatically fill in your contract pricing based upon the contract is selected. We try to select the right one, but you can, I mean, you could decide to select the different ones. Show can select price.

PHONE CALLER #1

1:11:24 I think I have the same rules in there, but let's see. They might have the same rules. I think they're just copies of everybody.

PHONE CALLER #4

1:11:33 Austin, there we go.

PHONE CALLER #2

1:11:35 That type of information for a customer that has that price but doesn't have a...

PHONE CALLER #4

1:11:40 Yeah, yes, correct. Yeah.

PHONE CALLER #3

1:11:42 We use the term contract loosely to describe pricing rules for a location or a company. Yep, generally, what people do is they will create what's called street contract, which is their standard off the shelf and then each customer as they negotiate gets essentially various from the street. And then you can change your street contract and anything they did negotiate as a variance will change with anything that they negotiated save in place with.

PHONE CALLER #2

1:12:14 Perfect. Cool.

PHONE CALLER #1

1:12:16 When the idea here is that because we can house, your costs and your customer specific pricing contracts, I'm not having to look up what we're charging this customer, what their markups are.

--- Quote templates ---

PHONE CALLER #1

1:12:25 It's automatically happening as I build this quote out. And therefore, I'm never losing sight of my gross margin as I develop this. So... now, I made my fine TUNE changes after slapping that template on there. I'm ready to fire this out to a customer. So before I do, I can go ahead and select my contacts that I want to send it to.

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

PHONE CALLER #1

1:12:45 And I can also toggle this stuff here. So we know how powerful the pictures are. We wanna leave those on. Let's say Matt was cursing like a saler and we don't need the customer to hear that fill will go ahead and turn that off. We can customize our messaging and e-mail. I just delete mine so that they, it draws their eyes right to the view, quote button. But now you guys can either pull it up on your phones or your laptops. You'll get an e-mail from Greco mechanical, and it'll have a button in that e-mail that says view and respond a quote.

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

PHONE CALLER #3

1:13:15 You put their...

PHONE CALLER #1

1:13:17 Come on now, Billy, it's not my first rodeo. I got rid of that silly cartoon dark.

PHONE CALLER #3

1:13:31 When you open it.

PHONE CALLER #1

1:13:33 This is what you should see. I don't know if you're looking.

PHONE CALLER #3

1:13:34 At when you open it to the sales reps can set up notifications to, hey, tell me what my customers looking at my quote.

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

PHONE CALLER #3

1:13:41 So track all that receipt history, not just receive one thing that the fact that they opened it saw we track.

PHONE CALLER #1

1:13:52 So it's got another Amazon prime marketing impression. You're logo at the top that's just the one I pulled off of Google. If you guys want something more on that you can, we've got the scope of work in this case outlined by a template that's

whatever you guys will put in there. We see the unit that it's for. And then those pictures you can print, save, do whatever the customer wants to. They can expand it. And then of course, at the bottom.

PHONE CALLER #3

1:14:13 Customer can also always just come back to your website and all this histories there on your website of all the folks you ever sent, all, whatever they can access that.

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

PHONE CALLER #2

1:14:22 Now, who maintains that part? If we say, okay.

PHONE CALLER #3

1:14:33 It's either you or us. It's up to you. So the information is automated is a Wordpress, plugin the Wordpress, like Wordpress.

PHONE CALLER #2

1:14:43 No, because somebody else don't know somebody else.

PHONE CALLER #3

1:14:45 If it's not, we can host or, but it will still want from your side.

PHONE CALLER #3

1:14:59 Service, what's that site running the service is main point.

PHONE CALLER #2

1:15:04 I did because they, I think so. I don't know.

--- Customer engagement ---

PHONE CALLER #3

1:15:16 You...

PHONE CALLER #1

1:15:16 Got a Wordpress website?

PHONE CALLER #3

1:15:18 There you go. Just plug right in.

PHONE CALLER #1

1:15:20 So, that's the best case scenario. And so, if your question also pertains to managing the information, all living in service trade. So the actual service activities, you don't have to reformat do anything special with it. It's there, your customers, the portal just becomes their looking glass where they can log in and get access to all the services.

--- Customer engagement ends ---

PHONE CALLER #2

1:15:40 You guys like a, otherwise, my customer can't get in there?

PHONE CALLER #4

1:15:43 Yeah.

PHONE CALLER #1

1:15:45 We support it, yeah.

PHONE CALLER #3

1:15:46 The way that it works. So, if you put the customer's e-mail address on a location on... a customer to record that e-mail address. Is there they come to your website, it says sign up for customer. If they put that e-mail address in, you guys get an approval, you approve it, any data on that location or company site, when they now log in using their e-mail address that you communicate to them with, they will be authenticated to see that data that's how it's matched.

--- Customer engagement ---

PHONE CALLER #1

1:16:23 So, we'd love to know. So this is one of the biggest revenue generators for our customer. We'd love to know from you guys, what's your initial impression of a repair quote or more importantly, what, how would your customers feel if they received a repair quote like this from?

--- Paper process ---

PHONE CALLER #4

1:16:35 You guys... like this by now?

PHONE CALLER #2

1:16:42 It's it's, our fill out on nine one one sheet.

PHONE CALLER #4

1:16:47 Basically deficiency, yep. And...

PHONE CALLER #2

1:16:49 It comes to, the office takes it sends it to a sales person.

PHONE CALLER #4

1:16:55 Sales...

PHONE CALLER #2

1:16:55 Person, I'm trying to keep the sales people out of the office of the family, right? Can make money?

--- Paper process ends ---

PHONE CALLER #4

1:17:00 Yeah.

PHONE CALLER #2

1:17:00 Then they have to come back, and create all the vendors at all the pricing and whatever they do, type it, all the...

PHONE CALLER #3

1:17:10 It's literally like a...

PHONE CALLER #4

1:17:14 I try to...

PHONE CALLER #3

1:17:16 It's literally a sheet of paper that they filled out or nine one one.

PHONE CALLER #2

1:17:20 Yes, as a form in there. And... yeah.

PHONE CALLER #3

1:17:28 Jimmy, I'm looking at this nine one.

PHONE CALLER #4

1:17:32 My date?

PHONE CALLER #3

1:17:33 That last week last Tuesday?

PHONE CALLER #2

1:17:36 Not...

PHONE CALLER #3

1:17:38 There was to, I just got...

PHONE CALLER #1

1:17:41 He's taking the theatrical route.

PHONE CALLER #3

1:17:43 Own way or they go back?

PHONE CALLER #4

1:17:46 Because it happens, it's like a living.

PHONE CALLER #2

1:17:48 Happen. So this is awesome because of anything, somebody who is in the office that has mechanical think can go in there, do not send us based off of that. If per.

PHONE CALLER #4

1:18:02 Yeah, exactly.

PHONE CALLER #3

1:18:03 How to?

PHONE CALLER #2

1:18:03 Right now, it sits in the inbox until they get the time to do it. And if they're tied up in, they're busy as call. They're not getting to the customers.

PHONE CALLER #1

1:18:11 And what happens if you get that out later than a day or two?

PHONE CALLER #2

1:18:13 You a competitor, they forgot like I can't or the pitching because it's cat down again and we wasted will paying for this because you already got me the stuff. Now. I can have fixed it all kinds of stuff that, yes, this is great.

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

PHONE CALLER #1

1:18:27 Love that. Okay. And, I'm gonna tie it back. So, I was hoping maybe you've seen the big green money button on here as well, right? So no more print sign and scan and make them jump through hoops to ask for more of our business. They're pulling up a quote that's mobile friendly. Maybe they're not even at their computer. They get it right in the palm of their hand. They see the pictures that are moved by

that, the build trust. They see this big green money button which is reminiscent of Amazon prime, dangerous by now button where you can impulsively just hit it, right?

--- Deficiencies ---

PHONE CALLER #1

1:18:55 So now they approve this. You got, you got technicians easily reporting deficiencies, can you see more deficiencies coming back to the office with the workflow? I showed you, on the mobile app? Yeah, because now they can just take pictures and stuff. It's not as much of a homework sign.

--- Quoting ---

PHONE CALLER #1

1:19:08 You got more pipeline coming back in. But now your sales team is notified as soon as it happens, right? They don't have to come back to the office to go through a stack of papers, right? They can slap templates on there. So now they're getting quotes out faster?

PHONE CALLER #2

1:19:20 It's gonna be a plus for the sales.

PHONE CALLER #1

1:19:22 100 percent. They love us.

PHONE CALLER #2

1:19:25 I'm not mistaken... right? On the meeting this morning. Yeah. So they just popped.

PHONE CALLER #1

1:19:31 Sales people love us, but the idea is you've got more pipeline coming back. It's it's getting out faster, but now it's getting out faster to customers. While it's top of mind, it's got pictures which build trust in this big green money button. All that added up. Can you see getting one more quote approved per office? That's usually the reaction, and in reality, our customer say it's way more than that. But, I like being super conservative just to illustrate a point. How many offices do you guys have that would be quoting this?

--- Pricing ---

PHONE CALLER #4

1:20:02 I...

PHONE CALLER #1

1:20:03 Just one office for your sales team.

PHONE CALLER #4

1:20:06 That would use the sponsor.

PHONE CALLER #1

1:20:07 Yeah, yeah.

PHONE CALLER #4

1:20:08 Yeah.

PHONE CALLER #3

1:20:09 They're gonna get one more repair per tech for 40 times 12.

PHONE CALLER #1

1:20:18 Majority of them. So what?

PHONE CALLER #3

1:20:21 180.

PHONE CALLER #1

1:20:23 Okay. What's what's an average small end value of your quote? If we're being conservative, like what's a little guy that you'd send out to a customer?

PHONE CALLER #2

1:20:30 I...

PHONE CALLER #1

1:20:30 1,500 bucks Billy. It was 480...

PHONE CALLER #3

1:20:33 Four, eight, 1,500 dollars, gross margin call, 30 percent third.

PHONE CALLER #2

1:20:37 I'll be 35 percent. Hello there.

PHONE CALLER #1

1:20:41 So, just gross margin we're looking at. So just gross margin will be 131,000 a year. Just gross margin... that's what we're talking about.

--- Pricing ends ---

PHONE CALLER #1

1:20:52 And we are hyper conservative. We said one more quote, right? Your smallest quote, right? So, the reason I like to kind of bring all that together is service trade is not just a shiny new tool that makes your lives a little easier and impresses your customers that it's a real a revenue generator and our customers do not come to us because they're running out of ways to spend their money.

--- Customer engagement ---

PHONE CALLER #1

1:21:09 They don't stay with us just because it's too hard to change. This is why they just average customer sees a 20 percent increase in annual revenue or better customers seeing close to 30.

PHONE CALLER #3

1:21:19 What... what will end up happening is we'll have more opportunity as your customer base. What you will inevitably do is you'll end up hiring some of your lower end customers because you can make more money doing more for you.

--- Customer engagement ends ---

PHONE CALLER #2

1:21:41 I love to hear that I.

PHONE CALLER #3

1:21:42 And you'll have the confidence to that you've got the pipeline to either... an extraordinary price increase for your worst customer.

PHONE CALLER #1

1:21:55 Run them out.

PHONE CALLER #3

1:21:56 Then maybe they, for you because you've got the confidence from your pipeline.

PHONE CALLER #2

1:22:02 I see. And up to, even, I can think of more on right now that we have been dealing with is the freeze, right? Freeze. But if you, if she is able to see or we're able to use the deficiencies as we went along, then I mean, if she's a good customer, I'm getting wrong but everything, is like happening and they can't determine those are free related back. I don't know 2019.

PHONE CALLER #1

1:22:30 2021, I believe.

PHONE CALLER #4

1:22:32 Well, the sorry.

PHONE CALLER #1

1:22:34 It was after the code start, the deep freeze was deep freeze was after cog, it was early 2021 February.

PHONE CALLER #2

1:22:41 The terms that her phone that she's still having today is even related to that. And if you add a record, then you could say it's no way, right? It, it was a freeze. We don't cover that stuff. No. I mean, we've been a partner with this customer helping her other insurance and we're heavy, but it's been painstaking.

PHONE CALLER #1

1:23:02 So that's cool to hear that story because we hear that a lot more on the fire on life safety side where we're talking about mitigating risk to avoid lawsuits. And we've had a customer take an audit trail from service trade and win in core because one of their customers had a fire after one of their inspections. And so they sued them accusing them of doing it, but they had documented all the deficiencies and it saved them. So it's cool to hear an example of that on the mechanical.

PHONE CALLER #4

1:23:27 So...

PHONE CALLER #2

1:23:27 This is liking to start for the billing.

PHONE CALLER #1

1:23:30 Awesome.

PHONE CALLER #2

1:23:31 A whole bunch of different backgrounds.

PHONE CALLER #4

1:23:32 Sure.

PHONE CALLER #1

1:23:33 Sure. Well, we'll definitely get to it. And I understand we're coming up on the time. So if we don't today, we're committed to having more meetings to show you more of it.

--- Quoting ---

PHONE CALLER #1

1:23:40 But I did want to tie back into this piece that, you know, Billy had already gotten to, but it's an online quote that never leaves your system. So you can track all the activity and behavior from creating the quote, who it was sent to when they viewed it, when they requested changes, when they approved it. And as he said, your sales people can get pinged every time they request a change every time they look at it so that they're always in the know. And that also plays back into the. So maybe once a week, your sales team wants to run a report of all quotes that have been sent and looked at, but nobody's done anything with it yet. Or maybe they want to run a report of all quotes that have been sent but haven't been looked at instead of assuming the customers go to you. Maybe you send it to a contact that's no longer with that company. Maybe it got buried in their inbox, maybe it got flagged by their spam filter. So it's an easy way to have a faster follow up on these quotes to again leave less money on the table, right? That we get that a lot. It's like a lightweight CRM.

PHONE CALLER #3

1:24:36 Yeah. So, so we, in the broad sense of the term, we are absolutely a customer relationship management, but like in the...

--- Quoting ends ---

PHONE CALLER #2

1:24:48 Generally.

PHONE CALLER #3

1:24:48 Speaking, CRM has come to stand for Salesforce automation.

PHONE CALLER #2

1:24:53 Yeah, we want.

PHONE CALLER #3

1:24:55 It is come to stand for.

PHONE CALLER #2

1:24:57 And...

PHONE CALLER #3

1:24:59 We do have that with the Northboundary application. So the way I like to differentiate for folks is that... you know, if you look at two different pieces of data, one piece of data is a piece of equipment that has an impairment that I want to let them know about. And I want, I wanna sell an up fit or pair, whether we absolutely manage all of that. In ServiceTrade. There's another set of data which is there is a company in my territory who's CEO, head of operations, whatever the admin for that person. The dog just entered Texas an, this fall. And I need to remember that she entered Texas am, and I want to send them to football tickets, the home, right? That's important information. It's not a search but it can be, and it would be that information would be inside of Northboundary, right? But it's not in ServiceTrade

because ServiceTrade only relates to the information about your customers, regarding sort of their equipment and what's best for the cycle of taking care of it. It does not necessarily take care of scheduling task for salesperson related to building a relationship with the admin and the CEO. I make a decision, right? Those are different workflows.

PHONE CALLER #2

1:26:29 What the business development, sales manager is trying to get at is a Salesforce, but also be able to measure, the Progress of his team and the...

PHONE CALLER #3

1:26:42 What really trying to do, is manage pipeline for sure. Okay. So between this and Northboundary, because you can tie this back to Northboundary. So for example, each one of these deficiencies can become an unknown size opportunity in Northboundary. They go, yeah. Yeah, you can do this back and forth with our customers.

--- Quoting ---

PHONE CALLER #3

1:27:10 Do this with Salesforce even all the time. Then once the deficiency turns into a quote, now, the opportunity gets a dollar back, right? Okay. Once the customer opens the quote, then it moves to a probability of from 10 percent to 50 percent, right? And so, once the customer says approve, it moves from 50 percent to 100 percent, you can automate all that easily.

--- Accounting integrations ---

PHONE CALLER #3

1:27:35 And there's some technology up there called zap or API where you don't even have to be a developer working with API. We can automatically talk to Salesforce using the zap here interface. So, you can automate all manner of workflows that doesn't require.

PHONE CALLER #1

1:27:57 So lastly, if I run a report of whatever quotes I'm looking for, I can pick up the phone and make some calls.

--- Quoting ---

PHONE CALLER #1

1:28:03 I can send them out one by one or if I want, I can just simply grab all of those quotes that haven't been looked at yet and send bulk, send them back to the customer, get it back to the top of their inbox, back to the top of mind. Awesome. So I noticed you guys didn't approve it. You could have, I wouldn't have sent you the Bill, but I'll go ahead and approve it right here in the office, we'll pretend that I got a phone call from the customer. And once that's approved, these two new buttons pop up and allow me to create a job directly from this approved quote.

PHONE CALLER #1

1:28:34 So I can select my due day, copy, all attachments. And I won't get into this yet due to having time. But this is an area where I could turn this job into a project. And what that would do is it would create a budget for me, which creates an opportunity to lock the budget, manage, change, orders, get into the whip reporting and all that stuff.

PHONE CALLER #2

1:28:53 But is that trade information in there, right? Another?

PHONE CALLER #1

1:28:58 No, it's in service trade.

PHONE CALLER #3

1:29:00 But not every, the payer rises to the level.

PHONE CALLER #1

1:29:04 Exactly.

PHONE CALLER #2

1:29:05 So I get, but we do have some. So depending... at one point, they determined it was a project, right? A dollar amount. Sure. So when I came on board, I'm like why the hell on 5,000 dollar project with all the admin, all the background, all the, you know, functions of a project when I'm gonna get women executed in the next day, right? So I'm like I want my revenue. Now, I have to wait some time and resources on paper or?

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

PHONE CALLER #4

1:29:37 Right.

PHONE CALLER #2

1:29:39 Lot of people downstairs only understand the functions of projects and how you forecast, and how you recognize revenue and all that they've been in service, serves totally different office. So it's like, okay, and we get the piece of equipment and we're gonna execute it, put it in through.

--- ST app contracts and pricing ---

PHONE CALLER #2

1:29:55 We gotta do next day within a certain time, we'll on it as a work board, but I'm on broken it as a, so there is opportunity here depending on availability, Progress,

PHONE CALLER #3

1:30:10 Exactly. Even if you created as a job and they forgot thing, they can always go back and turn into a project. Once they start setting up an, and everything else, they can just say with this. Yeah, but you're right? If I'm delivering 20,000 dollar piece of equipment with two hours or so set up that's not a project.

PHONE CALLER #2

1:30:29 A 1,000,000.

PHONE CALLER #4

1:30:30 Dollars.

PHONE CALLER #2

1:30:33 I deal, I want to recognize revenue on my side. I want to be waiting for costs and all that.

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

PHONE CALLER #4

1:30:41 Love that at the same time. I.

PHONE CALLER #1

1:30:44 In companies commonly draw the line based on the dollar amount. So that's where usually we come in and be like, well, we recommend doing it more on the time frame. You know, how spread out is this going to be? That's the qualifier? Yup.

PHONE CALLER #2

1:30:56 Availability, execution Progress for.

PHONE CALLER #1

1:30:58 I like you, Tommy, you get it. So I took that approved quote, a couple of clicks. It turned it into a job. So I don't have to type all this up into a work order. We got the approved scope there. We've got the service details.

--- Dispatch ---

PHONE CALLER #1

1:31:10 We've got all the parts that were approved by the customer. We even have the pictures that the original technician took of the issue. I can schedule this out right from here, right? On the job itself. I can assign my technician right from here, but this will also show up in your dispatch board and you can schedule that.

PHONE CALLER #4

1:31:30 Hey, correct. Yep. So.

PHONE CALLER #1

1:31:35 Multiple appointments. Yep. Cool. Any questions about the quoting that process?

PHONE CALLER #3

1:31:45 Receive payment through some centralized. You can send out invoices with a pay now button for them to do a credit card back to you. They can come to your, or, and see all the open invoices and all the paid invoices. And.

PHONE CALLER #1

1:32:04 Guess you guys want?

PHONE CALLER #3

1:32:04 With impact... we've already built that integration, right? So what it does is send impact an Ar, record intact, knows about it, and then payment record comes in market paid impact. So a transaction number?

PHONE CALLER #2

1:32:26 They set up their own... CH, so that's...

PHONE CALLER #3

1:32:32 No, you do not have to do it, pay. Now, give me the routing number. Give me the take out.

PHONE CALLER #1

1:32:38 They enter it, you don't they don't have to give it to you. They give it to you by entering it in.

PHONE CALLER #2

1:32:43 A big issue with the, so... yes. So we have that, so.

PHONE CALLER #4

1:32:52 Yes, no... all my.

PHONE CALLER #2

1:32:57 Yes, thousands and thousands dollars. And I'm sorry, once I've sent a customer Bill and they send their payment to me and they got stolen, I'm not pressing them to you give you check next thing collections because honestly, that is not their fault,

right? I mean, you know, they still owe me money, but I'm just like I'm not gonna go your collections on leaving you whenever you can protect stolen anyway. So now, the process is that they want a, to send it to an individual across the market. The, the only one who's access to do this. So I would like it to be automated.

PHONE CALLER #3

1:33:27 Just said, so the...

PHONE CALLER #2

1:33:30 Have our information, so.

PHONE CALLER #3

1:33:34 Correct. Yeah. Correct. So they, just when you set up the payment and billing that there there is a process, right? Because of anti fraud laws and everything else there, somebody as a principal here has to give up some until information anti fraud laws work and stuff like that, that's the way it works anytime you set up a bank account or anything, you know, just like that, they're essentially practically no fees for there are some fees for typical credit card... and it just clears to your bank.

--- Invoicing ends ---

PHONE CALLER #2

1:34:11 How does it work? Or have you had any issues with? So we have a good chunk of customers that have their own for.

PHONE CALLER #1

1:34:20 Good chunk. What, what you're talking tell me about that? Talking to third party service channels on how, what, what's a good chunk we should talk about this first?

--- Pricing ---

PHONE CALLER #2

1:34:35 Is 25 30?

PHONE CALLER #1

1:34:37 Okay. That's not as okay. You scared me there because some customers, some people, not customers, some people have 85 90 percent third party stuff. So that doesn't scare me. It's below 50 percent service channel. We do have an integration with them, Kareo.

PHONE CALLER #3

1:34:54 I would not, we will not oversell to every service channel customer they set up differently. Sometimes it doesn't add a lot of.

PHONE CALLER #2

1:35:05 Some customers that.

PHONE CALLER #3

1:35:06 About, right? It all depends. They do accept or clock events for example, for checking in and checking out. That works, right? In theory, they accept our invoices, but how often that works? I don't know because they are in the business of rejecting.

PHONE CALLER #2

1:35:21 Correct. Yeah.

PHONE CALLER #4

1:35:24 Yeah.

PHONE CALLER #3

1:35:24 There's there's kinda no, no. There's there's no magic pill to make that, you know, taste. I just never going to be a.

PHONE CALLER #2

1:35:37 I haven't heard any good things about that parting with.

PHONE CALLER #1

1:35:40 That's why we discourage it is so long you're as you're in business through them, you have that inserted middle man.

--- Customer engagement ---

PHONE CALLER #1

1:35:45 You always have to jump through their hoops and we're all about owning your customer relationship and improving that relationship. That's what service rate is.

PHONE CALLER #3

1:35:54 You probably can't get away from it 100 percent, but that, remember, I said fire your worst rotate up into your best customer. A lot of your best customers probably do not use those.

--- Customer engagement ends ---

PHONE CALLER #2

1:36:03 Unfortunate, I see.

PHONE CALLER #4

1:36:07 A...

PHONE CALLER #2

1:36:08 All get just, well, JLL doesn't go through or they have an e-mail address. So it goes, once you send that e-mail it goes, I guess in their background. So the log in.

PHONE CALLER #1

1:36:19 Okay.

PHONE CALLER #3

1:36:19 So, he bought, somebody bought JLL, maybe the bought source and somebody else bought forego one of those bought. One, one of them bought the other.

PHONE CALLER #2

1:36:31 The CPR this cre has different. They all go. They don't think.

PHONE CALLER #1

1:36:38 Yeah. Well, it's usually convenient for them.

PHONE CALLER #2

1:36:45 We can be put their invoices in their system crew. So it's like that's something I have written down. I want that back on. You get charged to use your system. Well, I'm not charge back to you because.

--- ST app contracts and pricing ---

PHONE CALLER #3

1:37:00 Administrative be two wherever they're charging, correct?

PHONE CALLER #2

1:37:05 Yeah. So I have for talk about.

PHONE CALLER #3

1:37:07 And we've actually got pricing rules where it will automatically add a certain item to every customer of X types Bill.

PHONE CALLER #2

1:37:15 As...

PHONE CALLER #3

1:37:16 A lot automatically put it on.

PHONE CALLER #2

1:37:18 We have, yeah, and...

PHONE CALLER #4

1:37:22 Yeah.

PHONE CALLER #1

1:37:23 For whatever reason, I can't get my mobile device, to mirror up here again, and that's okay because pretty much done with the mobile app.

--- Tech On-site ---

PHONE CALLER #1

1:37:31 I'm basically just gonna clock out here, right? So when I hit clock out, it's gonna say, hey, did you do these services? And I don't know if you can see that that's that well, but it's just basically the list of services that I showed you in the beginning. I'm gonna mark those off saying, yup, did that one. If for whatever reason, I couldn't complete one that's something the service manager will review, they'll see the comments and the be like he couldn't get access to that part of the building. We got to schedule another point for this.

PHONE CALLER #3

1:37:55 On page behind you before you get, I see all those and stay open. Now. Hit complete. Yeah.

PHONE CALLER #1

1:38:03 So, here's a cool little item that is a newer development, but this is actually like a little nudge or a guard rail. So I just tried to clock out and it saying, hey, there's no comments on this work order.

--- Deficiencies ---

PHONE CALLER #1

1:38:13 You went out and did a bunch of work. You're ready to leave, but you didn't tell us what you did out here as the same thing with photos and finding records and efficiency. So they go out on a job, they don't find any deficiencies. They don't take any pictures, don't leave any comments.

--- Tech On-site ---

PHONE CALLER #1

1:38:25 It's gonna stop them and prevent them from clocking out. So, before I can clock out, I gotta hit comment. I'm just gonna put in a bunch of gobbledygook right? Finish clocking out. And now those statuses will change from open to.

1:38:39 Completed...

PHONE CALLER #1

1:38:44 Yeah, I know everything's been loading a little bit slow.

--- Tech On-site ends ---

PHONE CALLER #2

1:38:48 It...

PHONE CALLER #1

1:38:49 Could be, yeah, there it is.

PHONE CALLER #3

1:38:51 Automatically change.

PHONE CALLER #1

1:38:52 In real time.

PHONE CALLER #2

1:38:54 It was completed, it would be.

PHONE CALLER #1

1:38:57 Show open. Yup. So when your service manager goes in to look there's like, hey, it looks like you knocked out two out of the three. What's going on with this third one. And then they would go down to comments here and they'd be able to see what, the technician put in there for.

PHONE CALLER #3

1:39:09 They can either pull that service off and bring on a new job. Go ahead and build this one or they can re, dispatch somebody or last service.

--- Tech On-site ---

PHONE CALLER #1

1:39:18 Now, this is not in that review status of the checks and balances where your service manager looks it over. So I can see that I've got these completed services. I can see all the parts and pieces that they put on this work order under clock events. I can see that Matt clocked in on site 176 point nine Miles away. Sorry he clocked in route, clocked in at the same place he clocked in route because I'm at this desk and you see this little flag like, hey, he's not where he's supposed to be, might be time for a conversation. So a little bit of visibility of the technician right there.

PHONE CALLER #1

1:39:49 We already know about the deficiencies, and then under attachments, I'm going to be able to see, you know, that dented panel door. I added a tasking sheet. This is a refrigerant tracking form. I didn't cover that for time sake. But however you guys are doing forms now, I'm not even gonna talk about it because soon coming down the pipe with native task in coming which is going to allow you guys to configure task lists in service trade that are going to be right in the mobile app that your technicians just tap off as they're going through the pieces.

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

PHONE CALLER #3

1:40:21 Before Europe. Okay?

PHONE CALLER #1

1:40:24 So this all looks good to me. I'm gonna go ahead and approve and create an invoice here. But before I do that, going back to the online customer engagement, I'm gonna send what we call a service link. And the service link is versatile in that it can be sent as a pre appointment reminder. You can send them out in bulk. Maybe for that week of all your PMS that are going to be happening. You can send it out in the middle of a service or you can send it out as a post service report after you've reviewed the work. So I'm gonna send this to you guys and I'll pull it up on my screen so you can pull it up if you want. So here we go another Amazon prime marketing impression exposing your customers to your branding. And actually one thing that I didn't click before I sent, this is also a new feature. You'll notice that when I go to send this, I can toggle these things off and on, right? So I can filter what my customer sees. So I'm gonna turn it all on. Actually, actually I don't have to send it to you because by clicking that toggle, it automatically updated the service link I just sent you. So now your marketing impression up out here at the top and you'll notice this big orange alert alerting the customer to the deficiencies that were found on their equipment.

--- Deficiencies ---

PHONE CALLER #1

1:41:35 So they can actually click this link and it's gonna bring them directly to the deficiency section. I, so here they can see that we found a bad compressor here, the pictures, the audio memo. We can see that we also found, a bad capacitor on rooftop unit three. But this one has been fixed because it didn't exceed the ante limit if you want.

--- Quote templates ---

PHONE CALLER #1

1:41:53 They can see that refrigerant tracking form right here that they can print, save, do whatever they want with. We see that dentedpanel door which also can have a

description associated with it. Any job comments if you want them to see parts and labor used, and for what service that was used on.

--- Dispatch ---

PHONE CALLER #1

1:42:12 And then of course, the services themselves. Where now they can see, hey, they were out there to do three services. They're all checked off with green bubbles here, meaning that they've been completed and especially for things like projects. If you really want to get really granular, they can see the time line.

--- Invoicing ---

PHONE CALLER #1

1:42:26 So they can see the days that this stuff was completed... and it can walk them through what the technician did out there on site. So again, the idea here is the reason I send a service link independent of the invoice is because it's an opportunity to shift the conversation to value versus actual payment collection, right?

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

PHONE CALLER #1

1:42:48 So, you should be sending these out at the completion of every service so that your customers get a friendly heads up of all, the work and the value that you just provided their facility. Now, by the time they get the invoice, they're already in the know, they already know what they're paying for. They're already ready for it.

PHONE CALLER #1

1:43:06 So, what are your thoughts on that? And how does that compare to what you guys are currently sending your customers to show them what you?

PHONE CALLER #2

1:43:14 Actually, we don't send anything free invoice?

PHONE CALLER #4

1:43:17 Okay. I...

PHONE CALLER #2

1:43:17 Mean, so at the time invoice, they get a copy off anything and everything links, that were.

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

PHONE CALLER #2

1:43:23 Okay. So they get the picture, they get pictures, they get all the forms, tasking, any kind of reports, any certifications... if it's for work and they get... no, it's yes, yes, sorry. Yes, it's automatically gets paper. So, we paper here's, my quote... my customer feel that emailed me, but I got a date. I put them together and I scan on to myself, name the file and I upload it to and then there. So, yes.

PHONE CALLER #1

1:44:01 How many jobs a day or a week are you guys doing that for?

PHONE CALLER #2

1:44:05 Anywhere that... 50 to?

PHONE CALLER #1

1:44:14 Sounds like a lot of time to put all that together. So it looks like a time saver because.

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

PHONE CALLER #4

1:44:24 Magician sales, and my back of.

PHONE CALLER #1

1:44:26 That's awesome because no, this doesn't manually get put together. It's already forming in the background. So you just fire that link off. You're just clicking a button. And the reason I like to show that first is to show that you can send it out independent of the invoice. But rest assured, it's also embedded in the invoice. So, if they missed it on the first pass, it's going to be there. Remind them what they're paying for.

PHONE CALLER #4

1:44:47 A, via the question to us to work.

PHONE CALLER #3

1:44:51 If you send a repair quote?

PHONE CALLER #2

1:44:55 No, no.

PHONE CALLER #3

1:44:55 Okay. For the answer and repair quote and you know, that customer requires the first sort, you can require a purchase order for them to you've.

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

PHONE CALLER #3

1:45:07 Already got. So quote repair, you know, that customer requires first sort... you can commit them that there is a place for you. So if they call you or whatever, but it is not something that they can go to for and add to the job. Not a bad idea.

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

PHONE CALLER #2

1:45:28 No, the jobs necessarily. But if we have some customers, they just send us a purchase or saying here's purchase.

PHONE CALLER #3

1:45:36 And, you can, so they can go to the portal and they can request a.

PHONE CALLER #1

1:45:41 I'm looking at that, I'm looking at that right now to see.

PHONE CALLER #3

1:45:45 They can't absolutely request repaired. And if they put it into, comes my purchase order number, you'll have.

--- Assets ---

PHONE CALLER #4

1:45:52 Okay. Yep. Yeah, I don't...

PHONE CALLER #1

1:45:53 Have to check to see in that case, all or.

PHONE CALLER #3

1:45:56 So, yes, they can request service online or a location or a piece of equipment if they like from your online, yes.

PHONE CALLER #2

1:46:06 Look like through this... system. So what does that look like? Coming back to service?

--- Dispatch ---

PHONE CALLER #3

1:46:12 It's a notification via e-mail and then it's a new work for job in.

PHONE CALLER #2

So the system automatic or the customer care?

PHONE CALLER #1

1:46:21 By requesting the service?

PHONE CALLER #1

1:46:27 Yeah. So now it's going to show up on, your jobs to get done. It's going to show up on your dispatch board. It's going to be in the ready to go.

--- ST app contracts and pricing ---

PHONE CALLER #3

1:46:36 I like to, they really don't...

PHONE CALLER #4

1:46:37 Want to.

PHONE CALLER #4

1:46:44 E-mail.

PHONE CALLER #1

1:46:45 That's right? So, I'm gonna go ahead and complete this job and create an invoice in one fell swoop. And the first screen I come to is the actual job cost. So this is where I can lock this. In. The example I often use is if you have a technician that goes out and spend six hours on a job, you can only justifiably Bill them for four, we still wanna lock in the actual cost. So we get the accurate margin so that's this phase here. And now, when we come to the actual invoice, we can tailor it tweak it to what it's supposed to be billing them for. And again, that customer specific pricing contract is showing back up. So it's automatically marking up our parts and pieces, right?

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

PHONE CALLER #1

1:47:23 And we can add items, remove items. Again, we see the gross margin on this job, everyone that we invoice. And so, when all of this looks good to us, we'll go ahead and send out that invoice link... send this, you guys.

PHONE CALLER #2

1:47:41 Ever?

PHONE CALLER #1

1:47:43 Reverse quote it... break it down.

PHONE CALLER #3

1:47:47 For me, what is that?

PHONE CALLER #1

1:47:50 I mean?

PHONE CALLER #2

1:47:51 So, instead of sending a customer itemized invoice, so that's that what was the mars man? Okay, say, hey, I wanna only wanna charge 35 percent more. So... typically you have to go in.

PHONE CALLER #3

1:48:10 You have.

PHONE CALLER #2

1:48:11 The... for, can I take my cost 35 percent here's, my total and that's all.

--- ST app contracts and pricing ---

PHONE CALLER #3

1:48:22 To create a contract that is a 30 percent contract or 35 percent contract or whatever, and switch contracts and it'll automatically move everything to 30 percent market?

PHONE CALLER #2

1:48:36 Okay. I don't necessarily also want to send an itemizing most of my text.

PHONE CALLER #3

1:48:40 You don't have you?

PHONE CALLER #1

1:48:41 Don't have to do that. It's just like the quote.

PHONE CALLER #3

1:48:42 Only group by material labor, whatever.

PHONE CALLER #1

1:48:47 So I can group it by service, go grand total only I can just lump it all under one simple grand total. Is that your preference?

PHONE CALLER #3

1:48:56 But in order to get the dollars, right? In order to get the dollars, right? You need to have a reverse quote pricing rule in here which you can absolutely put in that you can have it for every 30 31, 32, 33, just pick the 33 and it'll be 33 percent.

PHONE CALLER #2

1:49:13 Can, is that a generic contract that use across multiple customers?

PHONE CALLER #3

1:49:19 100 percent cost? Yes, it's just like having a master.

PHONE CALLER #2

1:49:22 I actually kind of like a...

PHONE CALLER #3

1:49:26 A, what?

PHONE CALLER #1

1:49:27 Pretty much pretty much. But the reason we say mark up rules is you can get more complex than just like a flat rate across all your parts.

--- Pricing ---

PHONE CALLER #1

1:49:36 So you can create a simple contract, just 35 percent across the board and, you know, you got a 35 percent mark. So you can have an arsenal of 35 40, you know, whatever. But then you might negotiate with some customers like, hey, all filters are only 25 percent or whatever.

--- ST app contracts and pricing ---

PHONE CALLER #1

1:49:49 Just for capacitor. It's this, you know, so you can get really granular with the rules or you can have those big broad strokes.

PHONE CALLER #3

1:49:57 You can also have things like every customer in this region gets trip church, downtown. Everybody in downtown... just automatic automatically.

PHONE CALLER #2

1:50:09 All the...

PHONE CALLER #1

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

PHONE CALLER #1

1:50:12 I love it. Be be thorough with us at the end of the day. We want it to be a good fit too. We don't want any surprises.

PHONE CALLER #2

1:50:19 And I wanna, I don't want have to manipulate or have workaround that I'm the only one that knows the workaround. Finally, tomorrow night doesn't know how to take it and take that customer and just give him a flat and he automize it. He doesn't know because he doesn't know that process system doesn't do.

PHONE CALLER #1

1:50:36 That's not scalable, right? You want to eliminate the bottlenecks, you wanna make this. So it's easy for multiple people to do. You don't want the company to cave in if you go on vacation?

PHONE CALLER #3

1:50:46 You know? So we invented back end the fire company. As we were working on the software, we invented all this pricing tools stuff over a period of three or four weeks after the primary with, and all of this knowledge in the books in her head... fire.

PHONE CALLER #2

1:51:09 Yeah.

PHONE CALLER #3

1:51:11 Billing stuff. And so we said never again, the rules should enable anybody to sit down and within a couple of minutes, they are proficient biller.

PHONE CALLER #2

1:51:22 So, when I came over to service one biller, only billed on Friday.

PHONE CALLER #4

1:51:30 All...

PHONE CALLER #2

1:51:32 Friday all in out to customers or what customer did? What customers got this? What customers did this? Like I can't have them, you got on vacation, you gotta be sick. You got something's gotta happen to you. You know, I can still function as the business. So Bill, but I, still, we're still back to like this customer only gets this.

--- Forms ---

1:51:55 No, you gotta combine all these documents to submit one PDF to this customer. All kinds of crazy stuff. I'm like, I don't want to remember this. I don't want to have all these cheat sheets. I don't have a spreadsheet over here. I go look and say, JLL, yeah, the one file and I want a system that does, I can plug it in for that customer.

--- ST app contracts and pricing ---

PHONE CALLER #2

1:52:21 It's all there. They can come in and invoice, you know, how the invoice that customer is simple and easy get exactly. I wanted to say.

PHONE CALLER #3

1:52:31 No.

PHONE CALLER #4

1:52:32 Crave.

PHONE CALLER #1

1:52:33 Absolutely.

PHONE CALLER #3

1:52:34 Administering those rules and keeping up with them through time is work that's a new type of work because now they just flat along, right?

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

PHONE CALLER #3

1:52:41 So administering them is work, but it's a better class of work, better class work. And nobody has to be in this office in all built. They can be on the beach in Chicago. They can be anywhere.

PHONE CALLER #4

1:52:54 Yeah, I wanna be identified.

PHONE CALLER #2

1:52:57 I want to make it where if my service manager has to do the billing because everybody got COVID, then he can do it. So that happened in this office. Our business Bill manager was here two weeks. The whole entire office got COVID, tiger office. They were closed now like this is to have.

PHONE CALLER #4

1:53:21 Yeah.

PHONE CALLER #2

1:53:23 We still have customers calling, right? But I had a, there was a lady at home had call that had the Bill. You can't get, well, you can't get well to come back. So you gotta be able to have it. It's easy for.

PHONE CALLER #4

1:53:42 Yeah.

PHONE CALLER #1

1:53:42 Well, and in the case of COVID, all of our customers, that was some of their best most profitable time. You got dispatchers in the living room, just dispatching text everywhere, you got people still billing business continued because it's all cloud based.

PHONE CALLER #2

1:53:56 They were the most serious record.

PHONE CALLER #4

1:53:57 Yeah, it's...

PHONE CALLER #2

1:53:58 Crazy as tail. They were the most busiest during even when the wall was shut down the HPC business. What the?

PHONE CALLER #1

1:54:07 Yup. Then we heard a lot of that from our customers as well. Yeah.

PHONE CALLER #2

1:54:12 And right now, they don't have nothing in the file. If they do it at home, they have to come back in here, to finish up the.

PHONE CALLER #4

1:54:21 Yeah.

PHONE CALLER #2

1:54:22 And so that's another reason why, you know?

PHONE CALLER #1

1:54:25 Having this conversation, yeah.

PHONE CALLER #3

1:54:30 Yeah, yeah. Yeah.

1:54:33 As well.

1:54:38 Have it easier if you're going to be able to also get in a financial system that works for you that, that's pretty rare challenge existing financial system trying to retrofit the new process. Them to this will be, this will be silky smooth alliance with us. You know, if you go in a, if you go ServiceTrade, you'll get everything you want the way you want. And it'll just be how quick can you train people and get them?

1:55:10 And that's the problem too is that we have current individuals who've been here. I think the office person once been here eight years. So, they've been trained by predecessors to manipulate the system to work for them individually. So that's how they've been trained. And therefore, they took it and made it how it works for them. The best way and not necessarily the proper way.

1:55:36 So...

1:55:37 I have now dealing with mind set. This is what I get that's not what you do it that's not.

1:55:42 Yes.

1:55:43 That's not the way we do it. And it's like.

1:55:46 Why did you do it this way? Because we boys.

1:55:48 Yeah.

1:55:50 So, I'll leave you, I'll leave you with this to.

1:56:02 Yeah, I can see that. Yeah... the...

1:56:12 This is the amount of effort today. Jeff deliver a great customer service. I'm gonna take six years. Now. Somebody according to their capital is importing the way their world reporting where their cheese is gonna get to add a.

PHONE CALLER #1

1:56:29 Usually accounts.

PHONE CALLER #3

1:56:30 Megan... wait on everybody about that plus two. And it just is what it is because nothing you're gonna put in is gonna have perfect fidelity which they can get you all the benefit. The six is still a lot less than 10 and we'll work on the sixth. We'll work on this as somebody's gonna holler, and either they're gonna get through you're gonna.

PHONE CALLER #2

1:56:56 Most definitely most definitely because it's basically a Andre both on the same page. As far as here's your Lane, stay in your Lane. There's a new tool. We get to the training to do your job. You have 90 days, right? I'm we about to 90 days if you're good for that fit for that particular role, responsibility and you're adopting, the new way we're gonna do business if you're not okay. You're still about employee, but you're just not fit for that role. Maybe you're fit for this role. We're gonna give you 90 days over here. That's only. So you get it there's. A lot of.

PHONE CALLER #3

1:57:33 I tell ya, go, hi guys.

PHONE CALLER #2

1:57:34 People in here that are gonna, that are going to know the customer is the value of our business and our hand or value of our business, and understand our.

--- Paper process ---

PHONE CALLER #3

1:57:46 We're looking at the end of the day like we wanna make it most simple, for the tax and for the sales because actually... either of those two as people are historically like text savvy or anything like that. So let's make it, give them the least burden.

PHONE CALLER #4

1:58:07 Yeah.

PHONE CALLER #3

1:58:07 We need to have more people in the back office... accounting, whatever other administrative thing, take the burden off of the people make.

--- Paper process ends ---

1:58:18 That's that's brilliant. He literally gives a speech and I know you're chuckling too because they're saying all this stuff. We have to educate people on you guys. I commend you because you're much further ahead than a lot of contractors, but he gives a speech on adapting to the skilled labor shortage. And he talks all about that. Your text are your constrained resource. So you wanna be investing in as much of that as possible. And I don't know if you can rattle the numbers off the top of your head, but he breaks out, a hypothetical business which is prototypical of the work that you do of a 10,000,000 dollar business, breaks down the different costs you can.

--- ST app contracts and pricing ---

PHONE CALLER #1

1:58:51 And, and, you correct me if I'm wrong, but you can double the admin in the SG and a, you can add a 20 percent parts increase. You can pay a 20.

PHONE CALLER #3

1:59:02 Or cmo for your labor. You've probably got the ability to get 50 percent more billing out of your labor that you're getting that. So it can do that.

--- Pricing ---

PHONE CALLER #1

1:59:14 Do the math.

PHONE CALLER #3

1:59:16 Let's do that. Even if you dealt with the Astra, man, if I, I'll see if I can get the.

PHONE CALLER #1

1:59:20 Think I can help you? I've watched it enough.

PHONE CALLER #3

1:59:23 1,000,000 in revenue and you've got 35 percent go more. Let's just say you've got... 6,000,000 in labor and you've got see 1,000,030 percent gross more called the slide.

PHONE CALLER #1

1:59:41 Yeah, I think it.

PHONE CALLER #3

1:59:41 Is by let's call this one point 5,000,000 and parts cost. So that gets you to three point 5,000,000 gross margin. Let's say you got a... two 2,000,002 point. They get you to a one point 5,000,015 percent even more. So I make the case to people that optimize around the technician. You can end up getting 15,000,000 revenue out of

the same, raising prices, getting them more productive out of the administrative work. Let's give them a 20 percent increase 6,000,000.

PHONE CALLER #1

2:00:19 Keep them around.

PHONE CALLER #3

2:00:20 This, yeah. Let's take this one point five and let's estimate that by 50 percent. Well, just to say there's no leverage it for. So that's 70?

PHONE CALLER #1

2:00:30 Two point two five.

PHONE CALLER #3

2:00:31 Two point two five, then do that map at 15 minus six and nine minus two point five, seven, six point seven 5,000,000 and gross profit now and let's double this.

PHONE CALLER #1

2:00:45 G and a, to reflect all the extra people you had in the office to make their lives easier.

PHONE CALLER #3

2:00:50 You still?

PHONE CALLER #1

2:00:50 Got...

PHONE CALLER #3

2:00:51 Two point seven, 5,000,000 dollar, which business do you like that? That even?

PHONE CALLER #1

2:00:55 Right. Thank you. When everybody else is making the opposite play. How do we eliminate overhead in the office? How do we cut costs?

PHONE CALLER #3

2:01:05 1,000,000 down? One point, where did you create?

--- Pricing ends ---

PHONE CALLER #2

2:01:18 Is the more you're affecting efficiently, the more money we're getting out the door, the more we're billing and.

2:01:24 Exactly, right. I gotta make...

2:01:25 Call next.

2:01:27 Go ahead and do that.

2:01:28 I'm going to the restaurant on my way out.

2:01:35 I enjoyed my car, that's my mobile number.

2:01:40 By no means are we go?

2:01:41 No, no, hopefully, I hope we aren't a second date. I've enjoyed our time.

2:01:51 Way better.

2:01:56 Operations...

2:01:56 Sfo?

2:01:58 Yeah, yeah. So we...

2:02:00 No, no, I mean, just, I saw that looks like the same day... but, I have a lot of detail. So I do have to tell you is also... a lot more detail than what we've been seeing like we saw... for... I mean, I might a lot of information at once. That's why I was getting at, where do I go? Get this in this? I can honestly tell you that my car is not so much a scary part. I think it's something. Another deeper conversation that you need to have is all the time, right? So you have whatever night guard or whatever you're talking about from CRM that ties into ServiceTrade at ServiceTrade, ties into your other quick site for reporting and stuff that's the only thing that I think I would want

to have a lot more discussion about a lot more. How, what does honestly that interface really look like? Because it's it may be seamless, it might be seamless. But to me, it's not seamless right now because it's like I have a British.

PHONE CALLER #1

2:03:07 Yeah, yeah. Yeah.

PHONE CALLER #2

2:03:10 And then it's be like if, what happens as service rates, all of a sudden not talk to her, you know, where we go for that to get that? What does that look like for my service rate? And the information will time to get out. So those are a little bit more conversation, but I love what you're showing right now because it is a lot of detail is slip is simple simplicity. I can ask what we're looking at? We're looking at delta computer in?

PHONE CALLER #1

2:03:39 Yeah, which is interesting to me.

PHONE CALLER #2

2:03:41 Well, and, they were originally designed for Construction which is great because it has a lot of.

PHONE CALLER #1

2:03:49 We have a lot of customers on computers.

PHONE CALLER #2

2:03:51 So, I do like their service side too... but I don't think they went down to this kind of detail, and when I say simplicity it means is easy on the eye for the technician, right? The technician is complex like that complex mechanical repair stuff to look at. They don't wanna look at this complex computer. So I do like that portion of this. I like all of the, where you can capture all of that detail for the customer. I like to think ease between my back office right now just seeing is more to look at sure to the customer and back from the customer to us.

--- Paper process ---

PHONE CALLER #2

2:04:32 Yep. So customer doesn't have to call salesman X or we can't get a hold salesman. He can still communicate to the business through the form or, you know, a simple phone call as well. But I mean, I like that part of it because now everybody's want to be computer technical digital and especially as younger people take people retiring and young people coming up to.

--- Paper process ends ---

PHONE CALLER #4

Yeah... absolutely.

PHONE CALLER #2

2:04:59 I like that part of this.

PHONE CALLER #1

2:05:02 That's awesome. And you're thinking about it the right way. I'm about to say a mouthful. There's a lot that to unpack right there. So I hope I've earned enough trust that, you know, I'm not about bashing any competitors or anything. So any time I give you a tip or a lead, it just comes from my experience of having hundreds of these conversations with contractors. So if I can save you any trouble and avert any crashes and burns, then I will do that as a fiduciary duty, right? FieldEase.

--- Accounting integrations ---

PHONE CALLER #1

2:05:34 I don't know what their demo rig is looking like, but they're just not good. And, and that's why we have so many Computerease customers. Now. They don't scare me because if you guys went with Computerease for the Construction software that's fine, we can integrate with Computerease. But due to the limitations of Computerease technology, that integration is nowhere near as nice in real time as Sage intact.

PHONE CALLER #2

2:05:56 So that's the whole, I mean, okay, you said that, but the thing, is like... how do I say this the less? But you can integrate, but they're not really your part. Does that make sense... there? Evidently in what I'm hearing is they're not your partner, like?

PHONE CALLER #1

2:06:18 So quick sight isn't even really a partner, but, I hear what you're saying.

PHONE CALLER #4

2:06:21 I...

PHONE CALLER #1

2:06:21 Hear what you're saying? And what I'm saying is it wouldn't matter if we were computers as partner fact. We actually were back in the day. It was one of the first accounting systems that we did integrate with. But the term integration with computers is almost an oxymoron because they don't actually have open API that allow us to do this stuff we can do with intact.

--- Accounting ---

PHONE CALLER #1

2:06:41 So, I'm not talking intact up because they're a partner. You could go with NetSuite, you could go with Foundation, you could go with whatever, but computer

is the most you can do with that is an import export which works for our customers because they're not motivated to change to a new accounting system.

--- Accounting integrations ---

PHONE CALLER #1

2:06:57 Everything is working on the Construction side. So we can import export which is like bash reports that you do on a daily or weekly basis somewhat primitive, but it works great for them because it saves them some double data entry, right? The field, is a really that's their service module that's a really good example of an afterthought step child right there. The bulk of their R and D is not going into that. Technicians hate it. It's clunky. It, it will not be good for what you guys are trying to do. That's more. The thing that I'm, keying you in on is the FieldEase thing. Computer is, a lot of our customers love it because it's great. On the Construction side. It's antiquated, but it's old faithful. So it works well for them. So I'm not necessarily bashing that. The only thing, that is lacking is the modern cloud based open API stuff, which is what Sage intact offers. So, so that's what I'll say about that we integrate again, integrate with both of them. It's much more of an actual integration with intact. This one is batch import export.

--- Accounting integrations ends ---

PHONE CALLER #2

2:07:54 I guess what scares me and it's just because I'm used to them all off. So speak, and, but I'm coming from... a 1,000,000,000 dollar company?

PHONE CALLER #1

2:08:05 Sure.

PHONE CALLER #2

2:08:06 They have that the one.

PHONE CALLER #1

2:08:07 Sure.

PHONE CALLER #2

2:08:08 Stuff. So, and we may be exposed to... different softwares like the partner. And now, I guess my part would be if we were ServiceTrade and all of a sudden... I site, I mean, I'm just putting that.

PHONE CALLER #1

2:08:27 Sure.

PHONE CALLER #2

2:08:28 Awesome out of business or no longer supports or whatever it's like? Okay, where am I going to get my stuff now? Is that the relationship with you and you will

find my new platform or do we have to go and say, well, shit, we can't use this no more because this is no more longer and service that's a big component. So we have a...

PHONE CALLER #1

2:08:46 Yep. So I'll explain that stuff too because you're right where, who's responsible for these integrations? How do you get support when you need it? The best you can do in navigating this is carefully selecting software tools with open API that are friendly because that's always going to leave the door open for easy integrations. Whereas if you get something antiquated, closed off, maybe it's not a big company. They're looking to be sold by somebody that represents risk that's it's a lot harder to transfer data. So, for example, going with service trade leaves you with a hallway of open doors, right? So if you don't like quick site that's fine, PowerBI, Crystal reports, grab any other BI tool.

PHONE CALLER #1

2:09:28 And we still have all the data that will just point to that tool, you can plug it in and you're good to go.

PHONE CALLER #4

2:09:35 Yes, yes.

PHONE CALLER #1

2:09:36 So, and so I'm moving on to that. The other big thing is not to sound cheesy cliche, but service trade customers. In our account management team, we're kind of a big happy family where, you know, a lot of our customers are in user groups that are nationwide. So we host an annual, what we call a digital wrap conference which is a user conference where non customers, regular customers come out to share trades and how they leverage technology. And we have speakers and events and stuff. So it's like, a meeting of the minds to come out and discuss all this stuff. So we're very invested in helping all of our customers be successful even if that means thinking outside the box with one of their other tool. So, I, we have a bunch of partnerships with a bunch of different tools, but we have a lot of customers using a bunch of different tools. We're happy to put you in touch with those customers. Or, hey, we know this customer is using this tool, why don't you try and look into it? So we're constantly making referrals because at the end of the day, we want you to be successful, right? Regardless of what technology you're using. And we're not one of those companies that, you know, if you have a project or capability you're looking for, we just shut you down. But like, no, that's outside of our square rubric here. Nothing we can do, try and find it somewhere else. That's just not how we work. We're very open minded collaborative and we want to get you what you need, and that's not sales pitch that's me going off script and just being honest from what I've seen with our customers. And before you guys sign anything, I would recommend you talk with one of our customers to see what the onboarding is like after sales support, see how they're using their tech stack and get some ideas because luckily, a lot of our customers are excited to tell other people about it. I probably wouldn't be

in your market because people are protective about it as a secret webin. But we can find somebody outside that same tech size doing mechanical even using intact or using Computerease. We got plenty to choose from. So.

PHONE CALLER #2

2:11:29 Make, so we started here with service read because if it doesn't work for service, then is kind of a wash, right on these different platforms because this is a 26 plus 1,000,000 dollar portfolio.

--- Accounting integrations ---

PHONE CALLER #2

2:11:46 So... but with that being said, do you know now if I say, yes, I like them and say, let's just go with service, right? Do you know now where to go for projects for CRM for your accounting card of?

PHONE CALLER #3

2:12:00 So, most of the rest, is, in. Okay. So the project management module is everything is more robust than a, but, so, so, my challenge is gonna be, you know, at the end of the day, I have to look at it. It's like, well, I mean, obviously, this would be much more robust. This is a more robust solution than.

--- Accounting integrations ends ---

PHONE CALLER #2

2:12:26 But, yeah, we, if we don't need to see all of.

PHONE CALLER #1

2:12:29 Haven't. Yeah, there's a lot. Yep, we'll go on more dates and we'll cover that stuff.

PHONE CALLER #3

2:12:37 So, the question is, and especially which makes it a little bit harder because, you know, what they're used to is the way it is right now and so even going to delta would be just, I mean a light or.

PHONE CALLER #4

2:12:50 Course, they're gonna.

PHONE CALLER #2

2:12:51 Have the people when they do it, yeah, they're going to be like what, and, I.

PHONE CALLER #3

2:12:58 So it's a light year ahead. And so to go and jump three like years ahead. It is gonna be, my challenge will be demonstrating the value and saying, you know,

looking at it and saying, well, what's the cost benefit ratio? Like here? So that's you know, just with you that's gonna be my challenge. So, so just like what you said about that's, those are my same concerns. And, and so, I don't even know how much the intact package will be. I have no yet. I told them, you know, send the service first because if you can't do, you know, they're not a solution for service defense? And I mean, it's automatically a deal breaker. We just end up going to date because each want perfect. It does it, we can get by and it'll do everything we need for the most part not perfect, but it'll get the job done and it'll take us through the next.

PHONE CALLER #2

2:13:58 Yeah. I haven't found any or review anyone that is... no, I would have your own right. But so there's not 81. I'm just like again one stop shop, like I wanna make it simple and easy for everybody to do business with. Because not only am I like looking for service is the biggest chunk of seo implement, but like I said, we have another business that we're going to create at the same time and get ready to launch. That's also just an easily... 10, 15,000,000 dollar business. So it also has to be functional for all these components have to be functional with H, one line of our business like Construction may could have used some part of service rate every once in a while, but that's not their biggest control.

--- Type of work ---

PHONE CALLER #2

2:14:55 It is Construction. My controllers line of business is going to be probably half and half because we're taking all the control work from our service business and put into that.

PHONE CALLER #4

2:15:05 Yep.

PHONE CALLER #2

2:15:05 So it's going to be a good portion of the same this where it does use projects and it does have reports and.

--- Purchase decision ---

PHONE CALLER #4

2:15:13 Make this contract and then.

PHONE CALLER #3

2:15:15 Application mix, which is a whole different.

PHONE CALLER #1

2:15:18 Which, which so I'll say this to... you wanna be thorough. You wanna turn over as many stones as you can but you wanna be careful not to cross that line of diminishing returns where you suffer from paralysis of analysis because the reality is you will not have every answer going into an implementation that's the nerve racking

part for some people, is even a really good partnership that you will later be like, my God that's the best thing we've done for this business is gonna start out a little bit nervous because you're gonna have to jump off the cliff and find your wings on the way down.

--- Implementation and ongoing support ---

PHONE CALLER #1

2:15:51 The good thing with service trade. And, and I honestly can say the same for intact and you guys working with alliance, you're wrapped with a team of resources and support. So it's not like you sign on the dotted line. We give you the software. But like good luck, see collecting that check, we're with you through implementation.

--- Implementation and ongoing support ends ---

PHONE CALLER #1

2:16:07 We're working with alliance, we're mapping, connecting you're in a test environment. You're testing all this stuff and you're not going live until it's right? It's not like you run out a runway and then it's crash and burn, right? The reason for that is if we didn't do it that way, it's a bad business model, right? Like what good to do to sell you something that we can't get you successfully up and running? You're. Just gonna turn and crash and burn down the road. And now we have to give you all that money back or we lose a customer. It's too much work that we invest and you guys are success for it to be a bad fit and you to crash and burn, which is why, I, even if you signed or wanted to sign today, I wouldn't let you there's. Too many other meetings and questions, right? So, so what I'm saying is it's a measure twice cut once but there's only so much measuring you can do to get this. All right? It will be a leap of faith. Eventually, it's gonna have to be. So the other thing that I'll say is bite sized chunk it as much as possible.

--- Accounting integrations ---

PHONE CALLER #1

2:17:02 So it sounds like, you know, in an I deal world, we would recommend service trade. And if you can do double data entry with the accounting system, then do the accounting system. But because we have such a good partnership with alliance, I feel good about you guys doing service trade and Sage intact right off the bat implement both one's going to be affecting more on the service side. One's going to be affecting the accounting side. And then we connect them to the CRM. I don't know what you're thinking of there, but that is something that can be added shortly after. And then we connect the dots there. If it's something. Yep. So, and depending on how you wanna use that CRM, it's possible something like Northboundary could work. And there again, you have an already tight integration with service trade. It's it's already there for what you need. If you go with something like Salesforce, open API, good software. They're in the zap your library. We can connect those dots after the fact. So those, none of those scare me at all, right?

--- Accounting integrations ends ---

PHONE CALLER #1

2:17:56 That's all stuff that our customers are doing. Quick site, is another one that doesn't scare me because quick site is just a looking glass. The... no, no that's okay. Yeah. And I'm just trying to because we did throw a lot at you at once. So I'm just trying, to simplify this stuff. You're counting integration that's already well established. We got lots of customers on that. You got a ton of support to get that stood up. Your CRM Northboundary might work. We acquired it. So who better to connect that and make sure all that works seamlessly. And by the way that integration is getting going to get better and better with time because we're going to continue to refine Northboundary and get you guys what you want you saying that service trade is the best you've seen so far. I'm flattered is if I developed it, I didn't, but I will say it's not a coincidence because a lot of the stuff you've seen here comes from feedback of companies that do exactly what you do all the R. And all the stuff that we're going to do to change this in the future is coming from feedback.

--- Implementation and ongoing support ---

PHONE CALLER #1

2:18:49 You guys could be one of the customers to help shape this, right? So all that to say you don't have to eat the elephant in one sitting that, we will help you with a path based on our successful implementation of over a 1,000 other customers, right? So this isn't our first rodeo. We'll help guide you through this. You're never alone, and we'll figure that stuff out as far as who's responsible for the integrations. Like I said, we don't get you live and then turn our backs and wish you luck. We want you to be successful. So if you come back to your account manager and say, hey, I'm really looking at this CRM, how does it connect?

--- Implementation and ongoing support ends ---

PHONE CALLER #1

2:19:23 Can we have a scoping call to just figure out how we connect these dots? Absolutely. Do you have a CRM rep? Well, let's all get together and talk about how we can put this stuff together. So you have a team every step of the way. Does that make sense? Okay? None of that is Liz or sales pitch that's me being completely honest based on the experience I've had with current customers. And I think you'll see that when you actually speak with a customer reference that it's coming straight from the horse's mouth.

PHONE CALLER #2

2:19:47 Can you walk down fields? Yeah, like I don't want.

--- Quote templates ---

PHONE CALLER #1

2:19:53 Yes, yes. Yes. Yep. So you create, yep, exactly, you create user roles and, you go through the plato of different filters like whether they can create a location, create an asset, you can limit what your text can see in the field. So they're never seeing any pricing there's. There's a lot of detailed rules you.

--- Quote templates ends ---

2:20:12 I think.

2:20:13 You may have another...

2:20:13 Meeting so I can get my...

2:20:16 Solely, absolutely.

2:20:18 Yeah. So, I mean, yeah, because I review delta and I'm gonna be honest with you too and cause I review for five.

2:20:25 Accounting or service. Okay?

2:20:29 I was concerned with service. Then we got a little deeper were like here always wanted to bring on a new account entry. We're trying to plan succession planning, employees. Like we have a ton of employees that are in that five senior retirement range and they have no succession planning. Yeah, like they can walk out and retire tomorrow. We have no one to sit in their spot. We don't have a system that were made, go sit in their spot and still run the business. The business we're gonna fill in.

2:20:57 Yeah.

2:20:58 Right. So that's where I came on board, we can start talking everything and we were like let's start with service, that's gonna be system for service, let's just turn service to its own business. I went on accounting. And then by time that gets up and running, and we worked out any leads or programs, what have you, then it'll be time to start implementing some of the other businesses. And by time that a big within our Construction department, then a lot of people that are gonna to retire or like I walk out the door and we can just switch it and still run the whole entire.

2:21:32 Yep. So.

2:21:33 That's you know, that's so I did look at tech and it was only one that really attracted me for the service portion of the.

PHONE CALLER #4

2:21:39 Okay.

PHONE CALLER #2

2:21:39 Like I said, no meetings at my account. No cpa or anything. I just know again, what makes sense to me, revenue versus margin, keep us down and... so to speak. And so that's when may come in and like he has to pick whatever to.

PHONE CALLER #4

2:21:58 Sure.

PHONE CALLER #2

2:22:00 But it did try me because I had a lot of information and, it met all the needs that I can think of or that I have experienced in the service role or anything that possibly or have a question to again make service our customers and make sure the technicians, is easy as eating.

--- Accounting integrations ---

PHONE CALLER #1

2:22:23 Yep. Yeah. Again, if it was a competitor that I would just like, yeah, no, they're worth looking at absolutely, then I wouldn't say anything bad about them. But the field is module itself if that's what you're referring to by deltech service.

PHONE CALLER #2

2:22:40 So they have the files is now, their app, the...

PHONE CALLER #1

2:22:43 Right. Yeah. The module back in the office, okay?

PHONE CALLER #4

2:22:47 Yeah. Yup. Got you.

PHONE CALLER #2

2:22:51 Office. Like one dashboard, we could get all kinds of information, dig down reports. And so that's one thing I want to get into is reporting and reports, but yeah, it's still up there. I mean, you're right here because I haven't finished looking at.

--- Accounting integrations ends ---

PHONE CALLER #4

2:23:08 Sure.

PHONE CALLER #2

2:23:09 For service, like you said, it will work for all the businesses have right now if we were to have today.

PHONE CALLER #4

2:23:16 Yup. You know, I...

PHONE CALLER #1

2:23:19 And again, as a fiduciary duty, I don't know much about the service in the office. Again, that's why we have so many customers on Computerease. The text will not be successful with the FieldEase mobile app that's where that will unequivocally fail. And again, I say that so you can avoid a crash and burn what I've heard from people's over promise under delivered so that's something to be mindful of. I don't know how you get out in front of that. If you speak to their customer references, but if it's just the computer is the back office side the accounting world and all that stuff, then we can make service trade work with that in a manner that reduces, takes away, you know, six steps you might have to add back to because it's important.

PHONE CALLER #3

2:24:00 We just...

PHONE CALLER #2

2:24:00 Make it, we haven't even gone through everything.

PHONE CALLER #1

2:24:03 Yeah.

PHONE CALLER #2

2:24:04 This may work.

PHONE CALLER #1

2:24:05 Perfect. Yeah, yeah, yeah, yeah.

PHONE CALLER #2

2:24:09 Like we talk, we may have to redesign our office personnel to make it work for.

PHONE CALLER #4

2:24:13 Yeah. If...

PHONE CALLER #2

2:24:13 This works for what we're trying to get the output, gives me all that information that we're trying to need to run our, it can be cut cost and be successful and grow our business, then we may have to redesign our office to fit it the other way.

2:24:28 That's that's an excellent way of thinking about because that often does have to happen. But based on all, the benefits and the value, you know, people are more than willing to like, hey, you can't have Progress without some level of change. So show us what we gotta do to get the most out of this system that's a great attitude.

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

2:24:42 Have you guys talked budget or numbers? It sounds like you haven't gotten pricing from intact, but did you have a certain budget set aside for service software?

2:24:51 No, I mean, so that's the thing is not necessarily about, I mean, it's really about like, I mean if we can go and show like spending a lot more, is we're gonna get this type of return from it?

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

2:25:04 They're open to? I mean, at the end of the day, we're kind of choosing all this stuff, but we still have to sell co, he's gonna be asking for. He's gonna want to see that cost benefit analysis. So nothing is necessarily off the table but, you know, we have to prove that with, you know, all these different functionalities that they're providing at least an equal amount of greater, you know, benefit to us in justify enough, have no idea how much impact is, but if it's 10 times more like that's going to be an uphill battle for me to sell that.

--- *Accounting integrations* ---

2:25:48 I kind of, you know, I'm just like open API the different third party partners. And, you know, I'm looking 10 15 years down the road, you know, that portion is easy. But, as the company, you know, grows, it's like we might outgrow some of the third party. I need to go to a more robust.

--- *Pricing* ---

2:26:12 We have the option there with delta. We really don't probably that makes me a little bit nervous, but is it enough to?

PHONE CALLER #2

2:26:21 You know, half a 1,000,000 dollar spend?

PHONE CALLER #2

2:26:27 This is this license base or user. I mean, so I have to buy licenses and the license per.

PHONE CALLER #1

2:26:36 Technician technician, office users, admin step are 100 percent free and unlimited.

--- Purchase decision ---

PHONE CALLER #1

2:26:41 So we consider them overhead. Your technicians are your money maker. So as you add them, you're making more money, that's when, of course, yeah, yeah. And to that point, I'll say cheap is not good and good is not cheap, right? So like you're saying, and like I said before, nobody buys ServiceTrade because they're running out of ways to spend money and they're just like spraying it everywhere for tax incentives or whatever.

--- Pricing ---

PHONE CALLER #1

2:27:04 But if you and we're not the cheapest we're also not the most expensive. But if you're buying software, we looked at the quoting alone conservatively speaking, hyper conservative. And that's net profit that's after all costs are gone, an extra 135,000. The reality is service trade will pay for itself and your accounting system and give you more profit. We'll drive more revenue. That's just the reality of it. So, for example, what's your annual service revenue, ballpark?

PHONE CALLER #2

2:27:30 Our annual. So, last year we did 26,000,000 dollars.

PHONE CALLER #1

2:27:34 26,000,000. That's a lot of zeros, 26,000,000. So our average customer is seeing a 20 percent increase and that's real data. But, if we be hyper conservative there, let's say you're a bottom performer, let's just say you suck in adopting new technology. We'll say you only see a 10 percent increase. Well, that's simple, Matt, that's two point 6,000,000 dollars. A, so when we think about that kind of increase, which you can count on that's like guaranteed when we think about that kind of increase. And then we look at even if your accounting system cost 500,000 because it plays better with your service module and it's scaleable.

--- Pricing ends ---

PHONE CALLER #1

2:28:10 And it's modern technology that you can count on not going anywhere the next few decades. Is it worth it? You know, especially considering your accounting system and your service module, they're the circulatory system of your operation. All of your revenue generating activities are going through that. So instead of saving some money to have a wash board, dirt road, why wouldn't you want to turn it into a super highway so that everything is super efficient, open API. If you want to add a new piece of technology, you can plug it right into your tech stack, right? So that's one of those investments that is just central to your business. And when you're getting that kind of return conservative return of two point 6,000,000, it kinda highlights really that ends up being a drop in the bucket. I see that.

PHONE CALLER #2

2:28:51 I understand that.

PHONE CALLER #4

2:28:53 Sure.

PHONE CALLER #2

2:28:55 That's you know, service numbers too. So he might if you say, hey, we've done a study where's our diagnostics and this is proven that that's...

PHONE CALLER #1

2:29:07 And actually, while I think about that, I forgot here is I've got a book for you. And if you're a reader, I'll get you two books. Are you guys both read you read books? It's okay. If you don't be honest, some people are embarrassed to say that they don't...

PHONE CALLER #4

2:29:22 I...

PHONE CALLER #1

2:29:23 Like it. And then I've...

PHONE CALLER #3

2:29:25 These, these are recent movies industry benchmark for mechanical contractors, good information of resources on what we're seeing in our customer base, your hock, the here.

PHONE CALLER #1

2:29:36 The thing I like most about that book is when I first picked it up and read it, I thought it was going to be service trade propaganda. I thought it was gonna say buy service trade by service trade, but that is a practical guide that any mechanical contractor can do outside of service trade. You don't have to purchase service trade to take on the principles for growing your business. In that book. It's a very easy reading. I think you'll enjoy it very much. He actually wrote to that's my favorite of the two. So we'll be able to talk numbers honestly. When we get to that point with

Kermit. I'd love to have Billy come back because he's you know, he graduated MIT. He's like he's just brilliant. Exactly that stuff. Let the CEO'S talk, but that's okay a little, yeah. Yeah, he's kind of a bull but it's because he's passionate it's because, he cares about this industry and he's invested in getting it going.

--- Pricing ---

PHONE CALLER #1

2:30:26 So to answer your question, we have three tiers honestly, you guys would be looking at either our middle tier or our top tier depending on what you want. We're going to discover that throughout the additional meetings, the way it really breaks down is enterprise. Our top tier is what you would consider for, the data analytics and recurring invoices. You guys are an enterprise sized company. So that's where I would recommend it. But if you're price sensitive, you could always start on premium and graduate to enterprise. It's really what you want. So you got options there. Premium is one 39 per month. Per tech, enterprise is 189 per month per tech.

--- Access to information ---

PHONE CALLER #1

2:31:02 Now, when we're looking at add on modules, you know, that stuff's gonna come into play but if I had to ballpark you.

PHONE CALLER #4

2:31:10 What is considered a?

PHONE CALLER #1

2:31:11 A tech is anybody who's running jobs in the field or anybody who would have to use the mobile app to go out and do work?

--- Tech time tracking ---

PHONE CALLER #2

2:31:32 So ours would definitely be.

PHONE CALLER #2

2:31:39 Controls would be, but I don't think I'd be a hard number to put... there gonna be project. So you consider text on project?

PHONE CALLER #1

2:31:55 Unless they're doing like full blown Construction if they're only using it, sometimes we have the concept of helper techs. So if they just need to be able to see the job that they're on and I forget, I think it's add attachments, maybe job items, I'd have to double check that, but they have a limited access to the app where they can only do certain things if it's like adding time to the job, then you can always have like a lead tech add their time to the jobs. Okay? So there's ways around that.

PHONE CALLER #2

2:32:25 Actually, I have a hard number like for that, some of these other you saying?

PHONE CALLER #3

2:32:28 I just...

PHONE CALLER #1

2:32:33 So just for grey code, normal users, regular users didn't you guys say 40 before?

PHONE CALLER #2

2:32:38 41 right now?

PHONE CALLER #1

2:32:40 You're thinking by the time you implement, you'd have 50 or, okay, well, we might as well aim high, then I mean, we'll right size is when it comes to actual, you know, moving forward, but I'll redo my numbers here.

PHONE CALLER #3

2:32:55 And then...

PHONE CALLER #1

2:33:00 So, with 50 technicians, you're looking at anywhere from about 90 K annually recurring to about 115 K annually.

PHONE CALLER #4

2:33:10 That's okay.

PHONE CALLER #2

2:33:11 That's just for service, right? Is that including the service?

PHONE CALLER #4

2:33:15 Yeah.

PHONE CALLER #2

2:33:16 That serve, I mean, for me to do my business for service and I say I want to go with service, right? That's just for ServiceTrade platform. There's no, you're not gonna be available or something else, I think.

PHONE CALLER #1

2:33:31 No. So the, so that is the annual recurring cost there.

PHONE CALLER #2

2:33:39 The, the one more thing.

PHONE CALLER #1

2:33:42 But you, the one you're using now is vision.

PHONE CALLER #4

2:33:46 That surprises.

PHONE CALLER #1

2:33:47 Me just because I think a vision whereas old antiquated not. Okay. I would have thought that would be a lot cheaper, good for them if they're still selling that then?

--- *Accounting integrations* ---

PHONE CALLER #2

2:34:00 Going back to them to talk to them about renewal or their next level of vision to revisit our program for a small company, but it does not, is not accounting... software. It does feed in anything over there. It's just really a data entry for us at this point in time, they have another enhanced system that's for, you know, but I don't like their platform. And then like I, everything user by everybody on feet to get into the system that's why I...

--- *Accounting integrations ends* ---

PHONE CALLER #1

2:34:30 Ask that we don't roll that way?

PHONE CALLER #1

2:34:36 Yeah. And we don't... correct?

PHONE CALLER #2

2:34:41 Where things to say you would get.

PHONE CALLER #3

2:34:49 Wow. Something like that. It's like, yeah, it's Ray.

PHONE CALLER #1

2:34:52 Their sales team. I don't know how they're doing it.

PHONE CALLER #3

2:34:56 So I think my best for action be set up. I don't know what your schedule.

PHONE CALLER #2

2:35:01 Yeah, like.

PHONE CALLER #3

2:35:03 We're trying to pull the trigger fast so we can set up a follow up and deeper dive into some.

PHONE CALLER #1

2:35:12 Absolutely. I'll actually pull my calendar up right now. The other thing I wanted to add onto the pricing is first year, one time fee is associated with onboarding.

--- Pricing ---

PHONE CALLER #1

2:35:22 Yup. And that's actually something we lose money on because we do so much for our customers and we don't charge enough. It, it'll probably go up in the future but that fee you're looking at around 20 to 25 K first time or first year one time.

PHONE CALLER #2

2:35:39 They all they all have.

--- Pricing ends ---

PHONE CALLER #4

2:35:44 Calendar calendar.

PHONE CALLER #1

2:35:47 So... yeah, exactly.

PHONE CALLER #2

2:35:53 Wait a minute. Okay. Let's talk business. So if we wanna do service now... and then we have a time, I see this where we go with... and we establish a time line when we want our other businesses to come on or... is that what an extra 25 for each business or is it phone rated?

--- Pricing ---

PHONE CALLER #2

2:36:22 Is it discounted? Is it, is it, hey, well, 25,000, but you're the main source to train, you know?

2:36:29 That.

PHONE CALLER #1

2:36:30 That part I, I'll have to get back to you on, but keep in mind when you're talking about adding other users and stuff, your volume is going up. So you get other incentives, right? So if you're adding on another 20 or 30 licenses here and there, like it's gonna build you in price incentives, we'll probably tear up the previous agreement and just rewrite another one that you sign with a better rate. And, and then again, in that same vein, you're adding users, we don't want to create an obstacle to get on board. I can't tell you what the services are.

--- *Pricing ends* ---

PHONE CALLER #2

2:37:08 Each company that would want.

PHONE CALLER #2

2:37:14 You know, but it would be like services first depending on how well service did on board is good. We're going six months down the road. We may want to bring on medals because at the same time we're gonna build is gonna be because there's a lot of business I'm gonna pull out of service to put in the whole business. So it's no sense pulling it into service and then back.

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

PHONE CALLER #4

2:37:39 The financing... yeah.

PHONE CALLER #2

2:37:45 I mean, yeah, there's gonna be timelines depending on how successful service that portion goes. Be good and smooth. We're talking like three, six, three months, six months, you know, and then.

PHONE CALLER #4

2:38:03 Yep.

PHONE CALLER #1

2:38:04 So let me help you here too. So implementation for a company your size, this is basically what the timeline looks like. Whenever you sign on it's. Usually about four Ish weeks after you sign is the soon as you can begin your service window, which is your implementation because we've done this so many times. We know that four months should be plenty of time for you guys to get up and running. You can definitely go live sooner than that. That really depends on you. But four months is what will a lot if you happen to run a little bit long for reasons that are not your fault. Like nobody's going to penalize you for it right after you've successfully

implemented, you get handed off to your own account manager who becomes your internal advocate for all things service rate. That said if you have support issues, we still recommend escalating it through the support lines which can be through e-mail or phone call. There's plenty of support team there for you. But, your account manager is going to be the one you'll have questions in talk about adding more licenses. Hey, this is the project what's the time line and if they need to, they'll pull in other resources from our team. So you always have somebody working with you every step of the way, to hammer this stuff out right now. I'm the door man. So I'm gonna help you with this first phase. That account manager is going to help you with every phase after that. So it's not like I disappear and you're all alone again, you have support all the time. Okay. Yeah. I think I covered everything with the pricing also companies your size. We recommend multi year deals. Nobody is entering this to taste test and they have, you know, they have their eyes on the exit as soon as they enter.

--- Pricing ---

PHONE CALLER #1

2:39:37 Otherwise you shouldn't be doing it. But multi year deals are another way to build in pricing sentives for you guys, companies your size that's pretty much a minimum of two years is what they usually opt for anyway. So, so yeah, I forget if I had any more on the pricing, but does that answer your questions here?

--- Pricing ends ---

PHONE CALLER #3

2:39:53 Yeah. The ballpark, is good for.

PHONE CALLER #1

2:39:56 Good. Because if we discover over the other things that you need or want then that will change that. But right now, I think we've got the bulk of it. It shouldn't be too far off from the numbers that I just gave you. So as far as soonest availability I have as early as tomorrow morning at nine o'clock your time.

PHONE CALLER #2

2:40:19 That just gives me a reason to cancel on.

PHONE CALLER #1

2:40:25 You, you need be dodging a bullet there again. Great software, but I don't think it's going to be what you're looking for.

PHONE CALLER #2

2:40:31 So, either I don't either, I just the guy.

PHONE CALLER #1

2:40:34 It was nice.

PHONE CALLER #2

2:40:36 Call me and I'm just like and after we, so then what really deterred me was the call me back by the day or two later and he said, hey, do you tell me what your title is again? And I'm like I'm a facilitator, you know, obviously... you guys because we can even do... the owner or like they won't even entertain a meeting here. You do what you guys do. So right there, I'm just like that's a flag.

PHONE CALLER #1

2:41:10 Fascinating. I love these stories because I never know what's going on in other sales organizations. You're the person?

PHONE CALLER #4

2:41:20 I got CP.

PHONE CALLER #2

2:41:21 Here. See here.

PHONE CALLER #4

2:41:24 I'm in the middle, my title.

PHONE CALLER #3

2:41:26 Is gatekeeper, I?

PHONE CALLER #4

2:41:27 Mean, the whole time on, I just...

PHONE CALLER #2

2:41:36 Third party or so like, yeah, so, okay, I can.

PHONE CALLER #1

2:41:41 I mean, if I had my pick after knowing who's who here, if I had my pick, you'd be the, I mean, you're great too, but you'd be the top of my list to talk to you because I don't like going too far up into the C suite where they're out of touch with the day to day because they just don't get it. I wanna talk to somebody directly related to the operations, has the vision for the technician and then let's go talk to them about numbers after you've edited.

PHONE CALLER #3

2:42:07 We...

PHONE CALLER #2

2:42:07 Don't argue. We just us, doesn't tell you straight up. I don't know anything about service. I have a price implement Construction like a into.

PHONE CALLER #4

2:42:19 Get out the way it works. And so.

PHONE CALLER #2

2:42:24 I know. But, yeah.

PHONE CALLER #1

2:42:26 Yup. I hear you. It sounds like you guys got a process. What? So for tomorrow, I'm thinking of the things that we haven't dove into. I showed you quick site, right? For the reporting that's not the end all deal. So you can use quick site if you want. And those dashboards that I showed you are can dashboards. Actually, I don't did I even show you? I think I pull them up on the screen, but I don't think I showed them.

PHONE CALLER #4

2:42:50 So, okay. Let.

PHONE CALLER #2

2:42:51 Me tell you what? So you touched opening a work for you, touch the maintenance support. I would like to see a report on a multi year. I wanna make sure I understood, is a customer and all the details, but I wanna make sure that what I'm wanting to see.

PHONE CALLER #1

2:43:17 Yeah.

PHONE CALLER #2

2:43:18 Okay. So, I see a probability, on maintenance a multi here.

PHONE CALLER #1

2:43:26 So that might take a little bit of time. I don't know if we'll get to that tomorrow just because I am not a quick site expert. So I would need somebody to put something like that together to demo for you.

PHONE CALLER #2

2:43:35 You know, brookside.

PHONE CALLER #3

2:43:37 How the...

PHONE CALLER #1

2:43:38 Exactly. It's it's your looking glass.

--- Implementation and ongoing support ---

2:43:40 It's it's we...

2:43:42 Use PowerBI at JC. I, yeah.

PHONE CALLER #1

2:43:44 So the idea is that the dates and the data are living in service trade, our Redshift data warehouse, which is what he mentioned puts it into this easily accessible format. So that when you're using PowerBI, you point that data set there, you put in the date I wanna see from this year to this year, this quarter, to this quarter, all the profitability because the profitability and all that stuff is living in service trade. Really, your report comes down to how you configure your own report and whatever BI tool you're using. So.

--- Implementation and ongoing support ends ---

PHONE CALLER #3

2:44:11 Right. So, whatever we, whatever reporting tool we wanted to look into to impact and to...

PHONE CALLER #4

2:44:18 Yeah.

PHONE CALLER #3

2:44:18 Like...

PHONE CALLER #4

2:44:19 Pull.

PHONE CALLER #3

2:44:19 In all?

PHONE CALLER #2

2:44:20 For maintenance, if you get here boats, I'm very used to if I go sell a maintenance agreement with us a three year, I go book it in my system.

--- Pricing ---

PHONE CALLER #2

2:44:30 I have agreement one, two three that's my first year agreement. Upon my renewal, it gives me a total different agreement number, but it's tied back, you know, to that your team or three.

2:44:45 Then.

PHONE CALLER #2

2:44:45 I got go again three and three. Then I can see the profitability on each one right now. With the system we have. Now, it only gives it one agreement number. I cannot go on any type of report or see any profitability year over year. Still, even when I do a renewal, it release that same agreement number. And I'm like I gotta be able to see if we're being productive or not or we're making money.

--- Pricing ends ---

PHONE CALLER #1

2:45:10 Yep. So this is one of those ones where the other thing is we pride ourselves on transparency. So if I'm not sure we can do something I'll never tell you that we can. This is one of those things where I'm definitively saying you can absolutely do that. And I know that because the data is in service trade.

--- ST app contracts and pricing ---

PHONE CALLER #1

2:45:25 So how you display in a report is going to be your prerogative if PowerBI allows you to break it up into dates like that, you can, I know in service trade, you can rename a contract for the following year so that you can differentiate between the two contract.

--- Pricing ---

PHONE CALLER #4

2:45:38 Okay. So that's that.

PHONE CALLER #1

2:45:40 So, because like a renewal will actually essentially be a different contract, right? But it'll have the same name with like a dashboard.

PHONE CALLER #2

2:45:47 That's what I want. That's what I'm trying to see a differentiation between year over year. Like the system we use now says data camable and it's contact number one two three. For year one, we go to renew, it is still a camable contract number one two three.

--- Pricing ends ---

PHONE CALLER #4

2:46:04 That's it, no gas, no, nothing.

2:46:07 Got you. So, but in this case, when you're using like a PowerBI, you wouldn't necessarily use a name of a contract to differentiate between the two. You would look at a date range. So first year, this is how it performs, second year. This is your second data set. This is how it performs.

PHONE CALLER #2

2:46:20 More.

PHONE CALLER #1

2:46:21 That you, can you compare to?

PHONE CALLER #4

2:46:22 That's that's where I'm working?

PHONE CALLER #1

2:46:24 How long it'll take me to produce, I would have to pull one of our quick site experts aside to produce that report because that's a quick site thing. I don't know how long that will take me, but I can unequivocally say, absolutely, you can do that if that's if you can trust me, yes.

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

PHONE CALLER #2

2:46:39 So that answer that question, I wanna talk more about... work orders, different statuses on work orders to report on, talk about... adding or deleting items on work orders or an invoice, how does that list in the?

PHONE CALLER #4

2:46:58 Okay.

PHONE CALLER #2

2:47:00 The inventory?

PHONE CALLER #1

2:47:02 Yeah, actually, let me pull up because I, I'm glad we're going through this list because I wanna get a few other people involved and I think that time is still gonna.

--- Parts management (inventory) ---

PHONE CALLER #3

2:47:14 Or no.

PHONE CALLER #1

2:47:17 Yeah. I think we can make that work. So, inventory, talk to me a little bit about that. Are we talking simply cutting POS in the field and applying cost to jobs or are we tracking inventory on the truck level? Okay? Have you?

PHONE CALLER #2

2:47:29 This is the first time I've been exposed. Well, not, I think it was the other field operations that they consider.

PHONE CALLER #1

2:47:42 No, they're not, it's but it's involved in the transferring of parts.

PHONE CALLER #4

2:47:49 Truck stock. Have you ever done that before? By the way? What truck stock inventory a JC, I, okay. I...

PHONE CALLER #1

2:47:59 Yeah. Okay. Well, as long as you have experience it.

PHONE CALLER #2

2:48:02 No, but the main thing I need to.

PHONE CALLER #4

2:48:05 Yes.

PHONE CALLER #2

2:48:05 I need to be able, to buy right now. They're buying it all to overhead. I can't track it any way to make sure all that purchase on overhead is being charged out some jobs. I have no way to track that information. So I need to be able to do that not only for us financially, but we're line as well. Yep... we do have our plumbers are some truck stock but not, we're not coming. Thousands of dollars may say 12 back on but not everybody doesn't do it. I think controls as an inventory that, they do... a control and stuff like that. So not every mechanic, not every truck... I think we have one name for our warehouse. So the...

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

PHONE CALLER #4

2:49:03 By the way.

PHONE CALLER #1

2:49:04 I'm listening, I'm talking to the people that I'm trying to get on the meeting tomorrow as I'm taking.

PHONE CALLER #4

2:49:08 But...

PHONE CALLER #2

2:49:08 Especially for... a tool.

PHONE CALLER #1

2:49:12 To like cranes and bucket trucks or, yeah. Okay.

PHONE CALLER #2

2:49:17 I'm talking sure machines on.

PHONE CALLER #4

2:49:19 Yeah. Before you machines.

PHONE CALLER #1

2:49:21 We don't do tool tracking there. Are, you know, there are platforms out there that do it. It would just be, we'd recommend taking another piece of software that where that's a solved problem... for the tool tracking that's just kind of a different piece than what?

PHONE CALLER #4

2:49:46 I...

PHONE CALLER #2

2:49:48 It is same.

PHONE CALLER #3

2:49:49 As it's basically a, has several different models and it's built around the software. But then you can also, instead of saying, well, I don't like your service module. So I'm gonna get service. I don't like, their manufacturing model, get license... but they have project management, which... inventory model they've got all. I mean.

PHONE CALLER #2

2:50:20 Right now, we're losing again, losing money because we can't track our specialty tools that we purchased and where they're located. We can't we're not charging them out on jobs. So that kind of stuff. And then also, I mentioned we have a mechanics, they create a tool list or per tool list. And then we are the... so if, right now the thing is to get broke into and they're just making them out, right? So if those that mechanic turned in a tool list, is this tools that he turned in and they were stolen, we will replace them.

PHONE CALLER #4

2:50:59 Okay. Right now to see.

2:51:03 Folder in a.

PHONE CALLER #4

2:51:04 Warehouse record. Yeah, right. So.

PHONE CALLER #2

2:51:05 We want to be able to track that. So if you say or intact that, then just so like we're trying to get away from.

PHONE CALLER #1

2:51:13 Yeah. Stop killing the trees.

PHONE CALLER #2

2:51:15 And they get more automatic. So if you say they can do that.

PHONE CALLER #3

2:51:18 Yeah. When you think about, this is more to think about. So... whereas other things.

PHONE CALLER #2

2:51:26 Okay. So that... we've always consider that part of for. So just here is like...

PHONE CALLER #1

2:51:32 Are we from the airport?

PHONE CALLER #2

2:51:37 Well, what time they come in or going or leaving or what are you gonna do?

PHONE CALLER #4

2:51:40 Minutes, boy, you know what?

PHONE CALLER #1

2:51:45 Yeah, I do. I might miss my flight. It's... it's I didn't realize.

PHONE CALLER #3

2:51:56 That...

PHONE CALLER #4

2:51:56 Late. That will suck.

2:52:02 It's gonna be super close. It takes off at six 39, which means it boards at like, yeah, it's gonna be tight.

The End