



# **ServiceTrade / Encore - Weekly Meeting**

Dylan Warner with Encore Fire Protection  
Imported on 4/23/23 via Uploaded Call, 1 hour 0 min.

## **Participants**

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# Transcript

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

PHONE CALLER #2

0:00 Hey, Dilan?

PHONE CALLER #1

0:01 Hey, Matt. Good morning. I, I'm doing well. I would love to get you in a room with Daniel Nolan because I feel like you guys... would have a lot to talk about you.

PHONE CALLER #2

0:17 Yeah, he's always very helpful and gives very detailed responses when I ask questions. So I like them.

PHONE CALLER #1

0:23 Yeah. Your, so your questions and his responses, the character count or the word count is typically about the same.

PHONE CALLER #2

0:32 You think so? I feel like he's our way more detailed in mind but maybe not.

PHONE CALLER #1

0:37 Well, the, if I took like the kind of accumulation of matt's question of like what you initially oppose to support and then the one sentence answer they come back with, and then the, you know, six or seven things you come back with to either give certification or more detail if I took the accumulation of matt's question or the issue and compare that to Daniel's responses. It would, I think there'd be some closer parity than you think.

PHONE CALLER #2

1:10 All right. Yeah, fair point. Yeah, I'd love to meet them sometimes.

PHONE CALLER #1

1:13 Yeah, Daniel, so Daniel started out on the TAM team and was moved to the product team just because the like the data warehouse is so much bigger than what the TAM team does. Like, it's so integral to the core product and some ambitions we have for the core product in the next year or two to do more in app reporting, like the new job performance stuff. I mean, that's so, Peter vendors, our UI us guy and Daniel Nolan are largely the brains behind that stuff.

PHONE CALLER #3

1:53 Both.

PHONE CALLER #1

1:54 Both super smart guys that we are very lucky and happy to have?

PHONE CALLER #2

1:58 Yeah, awesome.

PHONE CALLER #4

2:00 How I'm gonna fix the items view. We gotta show you examples today.

PHONE CALLER #1

2:07 Yes. Hey, real quick though. I wanna ask you about the service channel things you guys had the call with Amanda?

PHONE CALLER #3

2:15 Yeah.

PHONE CALLER #1

2:16 Number one, was it you guys or someone else that bought her lunch?

PHONE CALLER #4

2:20 Trevor.

PHONE CALLER #1

2:22 That is super classy.

PHONE CALLER #4

2:24 Yeah, TAM, like that, how much he center?

PHONE CALLER #1

2:28 I don't know what? I don't have no idea but.

PHONE CALLER #4

2:31 He, he mentioned it on the call and she's like he's like, and she's like Mississippi and I... Arkansas.

PHONE CALLER #1

2:45 And worst, she's in northern rural Arkansas is... well, it's gosh, what's the word... superfluous?

PHONE CALLER #4

2:59 Yeah. So, I don't know if Trevor bought it himself or on core expenses or whatever. But he, yeah, we paid for it.

PHONE CALLER #1

3:07 That was classic.

PHONE CALLER #4

3:08 Yeah, she was awesome. She was like, she's like, do you guys want to talk to like the national account director?

--- Pricing ---

PHONE CALLER #4

3:15 Like I'll talk. We need to talk to her and figure out like all the stuff. I was like, I was like we need to like do some internal ship here. First man. This is more of just like, hey, like this seems like a no brainer. Is it actually a no brainer? She's like, yeah, 100 percent... so, and she said, I guess she to the bus, but between you and I was, she, yeah, Sean came back. She's like they're trying to so like 50 grand. She's like they come and tell you that, tell them to shut up and charge you 10.

PHONE CALLER #1

3:44 Yeah, yeah, no, she's right. I mean, we, so we initially told them, hey, this will probably cost us 30 to develop. We'll plan to Bill you 10 and we stood by that we build them 10.

PHONE CALLER #4

4:00 Yeah.

PHONE CALLER #1

4:01 And it cost us way more than 30. We're into it way more than that. At this point. I actually have, I had some guys in Florida that talked with her recently too about it that's why I wasn't sure who bought her lunch. He said, one of the guys you sent me that you sent to me, bought me lunch. I was like that's nice. But the folks in Florida, we're like, well, it's already built, you know, are you trying to make all your money back on us? I was like, dude if we charge you 20, we're not even close to making our money back.

PHONE CALLER #5

4:30 And...

PHONE CALLER #4

4:33 Like a 1,000 a month. If you charge 10 grand, it's less than a 1,000 a month. The ROI on someone you're paying probably 30 to 40 dollars an hour to sit there and

punch in data by hand versus automating it all completely. Not to mention the fucking receivable end of invoice goes invoice is paid probably much faster.

PHONE CALLER #5

4:51 Yeah, doesn't auto.

PHONE CALLER #1

4:53 So, she probably took you through like the specific things that it does not automate attachments yet. It doesn't do proposals yet. But both of those things are capabilities that are available. We just haven't had anyone say I'm willing to go on this ride with you to build this yet?

PHONE CALLER #4

5:11 Well, I don't know where will be me and ever need to connect. And then we sucking also on all this because she's gonna be... integral to figuring out how this all works. And also just from a ServiceTrade perspective.

PHONE CALLER #5

5:34 This will be my project. No, just I don't want it.

PHONE CALLER #4

5:38 But like the, it's a project. I'm just like sure, what shift do you need to turn on? Where do we connected to CW, where it's all connect on your end? And then once it's like a, you know, but it's like an ad. I can actually heard of that before. Once you, it's like an hour hours worth of mapping exercise. And then once you said it, it's like wrong co you set it and forget it. And then we don't have to hear a shit about work orders ever again for anyone we tell them, get your customer on service channel or enter your DAM self, leave us alone.

PHONE CALLER #5

6:12 Yeah.

PHONE CALLER #1

6:14 Well, so you guys pay service channel per work order though, so.

PHONE CALLER #4

6:21 But it's so that's cheap money.

PHONE CALLER #1

6:24 Honestly, I have no idea. I have no idea what their rate.

PHONE CALLER #4

6:26 Reporters are like, I mean, kind of blog the barrel like stuff, right?

PHONE CALLER #1

6:32 Yeah, I mean.

PHONE CALLER #4

6:33 I...

PHONE CALLER #1

6:35 Have no idea.

PHONE CALLER #4

6:36 I assume.

PHONE CALLER #1

6:39 You find...

PHONE CALLER #4

6:42 Up until acquisition started on, core, choose to ignore all aggregator work order. He just said we're not gonna do this. I'll see you later.

PHONE CALLER #1

6:52 Right. And it's because it's such a pain in the ass to manage there's...

PHONE CALLER #3

6:56 So much.

PHONE CALLER #1

6:56 Touch time. And that's what I was talking to these guys in Florida about too. I was just like, look, you know, you may only have 90 or 100 locations in here now that you're working through service channel. Why wouldn't you have 500 or a 1,000 in two or three years, if this is just easier work for you now, and he was like, yeah, what I think about that, yeah.

--- Pricing ends ---

PHONE CALLER #4

7:21 For a man... do you know that?

PHONE CALLER #1

7:26 So, we got to talk about the items thing. I also, I saw a note from Matt in a ticket earlier this week. Don't remember which day I think a third of my brain is still in port Rico, which is less than the 60 percent of my liver that's still there, so.

PHONE CALLER #5

7:47 Good to.

PHONE CALLER #1

7:50 You there's they're like rum is their thing.

PHONE CALLER #5

7:54 Really?

PHONE CALLER #1

7:55 Yeah.

PHONE CALLER #5

7:56 No, they are so ignorant of me.

PHONE CALLER #1

7:59 They like, they have a whole like board tour thing and I don't drink rum. I don't like rum. It's just not my thing.

PHONE CALLER #4

8:09 Ron...

PHONE CALLER #1

8:10 But, but weirdly their prices on most burbans were less than what I pay in North Carolina because North Carolina's liquor taxes are so insane. So I was actually getting burban at some very reasonable prices in port Rico. Cool. So, so do you wanna do you wanna do match piece at the data warehouse piece? Like I saw, it looked like it was mostly related to like the creation of tags and the logging of who created and some of those events.

PHONE CALLER #4

8:45 I guess view open tickets on you.

PHONE CALLER #2

8:48 Yeah. So I guess I'll take a step back and kinda go back to the last year or the year before whenever we started talking about this. And we have an issue where a lot of the transaction type events that we do from API calls or bulk uploads or the toolbox, any of those, not all of them but a lot of them, they don't track the event that's happening in the history of the service trade app. And we ask service trade. Hey, can you just anything we do with the API? Can you make it show up in the history? So we can track what actually happened? And they said we could, but we don't want to because it's gonna just clutter up the history screen. So your shit out a look. So we have no ability to see like if someone creates locations in bulk, we can't see who created that or they update something, we can't see who's updating anything. So we can't see that. Then we need to see it somewhere. So we, I figured, okay, let's see if we can just get it in the data warehouse or something. And then we can export it, see



it in there and whatever. And it sounds like Daniel is open to. That might not be as easy as I thought because it's going to be different for each entity, but at least he's open to it and something we can explore. I don't know if there's a reason that you guys don't want to add to the UI. I feel like that would be a much simpler solution and it would save a lot of hard for your other customers too that don't even use the data warehouse especially for that initial creation. Like is there any reason anyone wouldn't wanna see that in the history? I can't think of any single reason someone wouldn't want to know who created an end.

#### PHONE CALLER #1

10:30 Okay. Well, a couple of thoughts on this one is you're gonna make more Progress in this conversation with Daniel than you are with the core product. I can just tell you that right off the bat because Daniel... understands, I think he understands what you're trying to accomplish here better than most from a like repudiation aspect... there's Justin again.

#### PHONE CALLER #4

10:59 Yeah. I just gonna jump over on... my kids home before.

#### PHONE CALLER #1

11:05 Gotcha. So, so he's gonna get that. I think better than most. But the other piece of this is the core product team has to.

#### PHONE CALLER #3

11:19 Yeah.

#### PHONE CALLER #1

11:19 Man, how do I not be offensive to somebody? Say this? The core product team in some ways has to develop to the least common denominator with UI stuff. And so with some of our customers that have, and they may have certain automations through customer integrations through appear that their normal office worker is unaware of. And when the normal office worker goes in to like a quote history or customer history, location history or a deficiency history, and they see, you know, nine rows of like API activity. I think the thought probably I'm guessing is probably that they're going to see that and that's going to generate more questions and more noise from a support perspective than somebody who could get this information through like the data warehouse like you're proposing. And I think it sounds like Daniel's agreeing somebody who is capable of the more advanced reporting functions and is willing to do some of that work. I.

#### PHONE CALLER #2

12:34 Alternative thought based on what you just said now and this might be a heavier lift. But for our post requests from the API calls, would it be possible to add in another parameter that says, do I want this to post to the history? Yes or no? And then we could control it and by default just have it off. So anything that's existing setup with zap and stuff doesn't post it. But if we say, you know what? I want this one to show up in the history, let me control it and just turn it on?

PHONE CALLER #2

13:16 Guessing a heavy lift based on your reaction? Well?

PHONE CALLER #1

13:20 I'm trying to think through who side that list is on... is that.

PHONE CALLER #2

13:27 I think professional services?

PHONE CALLER #1

13:30 Well, no, no, I'm thinking either zap or service trade because... I'm guessing it's probably on ours... but I don't know that for sure.

PHONE CALLER #2

13:42 It was an optional parameter. Then everything could continue working on the API side as setup unless you guys made an update that even gave the option to control that within zap, or then it wouldn't touch that at all, which I think is fine. We don't need it all updated at once even if for now we just have it with the, you know, manual API call and stuff have the ability to optionally put it in there. But then it still wouldn't break any of the existing setup stuff.

PHONE CALLER #1

14:13 I like that idea better than everything posts. I also just want to be realistic about how fast the product team would likely move on something like that if ever so. And I think what you're in correct me if I'm wrong, but I think what you're getting at is, yes, both, let me keep working with Daniel on what I can get in the data warehouse and you me, Dylan keep pushing on the product team to.

PHONE CALLER #2

14:41 To...

PHONE CALLER #1

14:42 Make this adjustment to the API or to the history so that when bulk changes to these things happen either through toolbox or through zaps... that can't see that's. The other thing too is the toolbox stuff like... I don't know why that doesn't post to the history because that's a tool that we developed and... it's the same user as service trade. I don't know.

PHONE CALLER #2

15:12 All, I think it's all based off the API calls though it's treated exactly the same as if we manually did an API call. So it doesn't even know the difference. If the core app isn't set up to show that, then it's not gonna treat the toolbox differently. I wouldn't think.

PHONE CALLER #1

15:28 No, but... the attribution should still be there because it's the same user. So whether I'm logged into at ServiceTrade dot com or toolbox, dot ServiceTrade dot com. I'm still the same user, but yes, I get what you're saying there's still that middle link in the chain of I'm just interpreting inputs into actions. So I get it. Yeah, I need to ask James about the toolbox piece... and he may have some thoughts on the... on like the API attribution in the history. But more likely that's going to be a rein hard or Ramen thing. So Ramen is our... I think his title is VP of engineering. I mean.

PHONE CALLER #2

16:20 Other thing too is even if you just turn on the created on always posting to the history and nothing else, I think that alone would be super helpful. We don't necessarily need to know every little change that happens on the job but just to create it or whatever entity, it is not necessarily a job. But... I think everyone would be happy to see who created it even if it was from zap or something else just to track it and know this happened. But to your point, yeah, I think we wanna go down both paths. I think there's still a lot of use to have that so we can export it in bulk and analyze data and figure out what's going on big picture versus also barely helpful to see right in the UI and for an individual use case know who did what on an entity?

PHONE CALLER #2

17:22 And I think as we dig more into like API and trying to figure out what users are doing and how productive they are on a day to day basis. That's going to be really important to see like this person scheduled 10 jobs, yesterday, this person scheduled 50, they both have the same job title. They're both getting paid the same amount. Why this one able to do five times more work. And we don't really have that visibility right now.

PHONE CALLER #1

17:45 Okay. I think I've got, I think I've got what I need on this. So... I'm gonna ask Daniel... if let me actually find this threat real quick.

PHONE CALLER #1

18:22 Okay.

PHONE CALLER #1

18:48 Right. Yeah. I've got a message out to him. So yes, I agree. Both pursuing both right now. Makes the most sense because I think the data warehouse can probably most likely get you part of the way there, long term, seeing it having the option to post to the history. I'll actually let me make a note of that, making it something optional ideally.

PHONE CALLER #1

19:32 Yeah. Making that an optional, making it optional for API actions to post to the entity history... and search, what was the? So what was the specific relevance to tags in this case? And I could be misremembering, but I feel like I saw some conversation about tags specifically here.

PHONE CALLER #2

19:54 So tags is what I'd most like to see it on. And is also what I'm told the hardest do because of tags being treated differently than every other entity. And we asked for some tag data to be posted to data warehouse and I guess... it's sitting on like a completely different server or something that's completely underpowered. So they don't even have the ability to frequently refresh it without like crashing it or something which sounds a little scary when you think about it.

PHONE CALLER #1

20:24 I was just thinking that.

PHONE CALLER #3

20:28 All the tags disappear from server tomorrow.

PHONE CALLER #1

20:32 We got, we've got all of our tags posted on a tiny little to.

PHONE CALLER #3

20:37 I think the other piece too is like we, and this isn't a great scenario and it is what it is, but we have a lot of like kind of business critical information that is separated via tags and actually not can correct me. But I think a lot of our automated reports, automation fires off of tags. So knowing who deleted a tag when it's deleted is can be super helpful to like correct behavioral stuff inside of our own operations.

PHONE CALLER #2

21:11 Yeah, we actually, we use tags to trigger off our material order process. So we put this create M of tag on a job and it creates a material order form. But if someone asks, hey, who ask you to create this? Like I have no idea. Someone put the tag on the job we created the of, I can't tell you anything about it really. And it seems like on the back end... once the tag gets deleted, it like wipes it from your history or something like you don't even keep a real record of it. So it, sometimes we reach out to sport and they can tell us what happens. Sometimes they don't sometimes it's a matter of getting it to the right person because some people seem to not understand that tags are operating differently or something. So, yeah, it seems like there's something odd about tags where it operates completely different than all your other entities.

PHONE CALLER #3

22:08 That, that's the relevance for us as it's just correcting operational and behavior inside a process behavior inside of on core. And then separately, the thing that Matt just brought up that I didn't even think of is it would be incredible if we could tell like by user who's doing X amount of work and then flush that because that would drive us to a huge, you know, efficiency operate opportunity.

PHONE CALLER #3

22:41 Okay.

PHONE CALLER #3

22:54 And sorry, did you and I was half paying in touch, half listening to crying, maybe feeding? Did we land? Is this something that sits inside of? I forgot his name, but the head new head of their warehouse or is this something that sits like professional services?

PHONE CALLER #1

23:13 It's not really professional services. It's Daniel Nolan who he's our technical product manager, which means nothing really but he is our data warehouse guru. And then separately, it's over a product engineering which currently lives at the top level, Brian Smith, wick, asco Marino Ramen. I don't know romans last name. Sorry for the... and then from underneath Ramen is all of the guys and gals... that maintain the core product infrastructure, ie the T3 nano that apparently our tags it on... and... all the way up to like... the folks that are actually engineering and coding the core product include, you know, the web app and mobile app. So it's Daniel on the data warehouse side, but from the entity history side that's all that's remains team.

PHONE CALLER #1

24:27 Okay. I think I have what I need to take this up with the right folks. I did reach out to Daniel to make sure that the conversation around the data warehouse stuff continues. But I'll pick up the mantle with the product team from here.

PHONE CALLER #2

24:44 So, along that same path to kind of different path, but same topic right around the time that you came on as our account manager and was there any, Wendy or whoever was leaving? Or she had said there was some kind of portal that was going live that had like your upcoming road map for the things that were in the pipeline and coming out the next couple of months or quarters or whatever. But we never saw that. Do you have Justin? I don't know if you actually got access to it or where it is.

PHONE CALLER #3

25:18 Now, now that you're talking about, I remember her talking about, but I don't like that.

PHONE CALLER #1

25:24 This is it right here. It's not live yet though so we're we can input, can you guys see my screen by the way?

PHONE CALLER #2

25:35 Yeah.

PHONE CALLER #1

25:35 Okay. So we can put like feature requests and stuff through here. Like we just, we internally just got access to this. I think in February... their, the plan to make this customer facing I think is still in may. The last update I heard was in may, but here's like here's an example right here. So... this is a feature request. The status of this request is currently under review as feedback is added or as it's voted on by other customers like that will be indicated here as well. Same thing here. Like here's

another status like need more specifics under review. So, these things and by the way, like as you guys have given me things... let me see if I can find, yeah here we go. So here's why is there only one under you? I may have actually, I may have put some of yours under John when I first got started with this just for the sake of expediency, but yes, like.

PHONE CALLER #2

26:45 I...

PHONE CALLER #1

26:46 Know, right? So, so some of these will get there's some attribution to John here instead of you possibly, but... you know, like...

PHONE CALLER #3

26:57 Make sure we can pick and choose the ones that we separate.

PHONE CALLER #2

27:01 Submitted.

PHONE CALLER #3

27:03 We stick that in on all the good ideas you John submitted. That was me or Matt or Alexander.

PHONE CALLER #1

27:08 Yeah. So I'm like I've been putting these in on your behalf, but next month when this is made customer facing, you guys will be able to come in here and see which all of these currently say no status, which is... super encouraging. But this is what's that.

PHONE CALLER #3

27:33 What's voted on?

PHONE CALLER #1

27:35 That's my favorite. And that's going to get a lot more attraction when this is customer facing. So let's say, let me find one that... here's one. So this has got two votes. Basically the voted on means multiple customers have said, hey, I want this feature.

PHONE CALLER #3

27:53 It'd be cool if you guys like put it all together. And then like if you could like ferret it out to everybody and be like, hey, would you use this functionality if you like 50 percent, it's like, all right, start building... it sounds?

PHONE CALLER #1

28:06 Right here, if I start typing approved expired. So like if I start typing in a feature request, it'll say, hey here's. A potentially similar idea. Is this what you're looking for to and then you can add some feedback to here's why this is important to us as well.

PHONE CALLER #3

28:27 Cool.

PHONE CALLER #1

28:30 So...

PHONE CALLER #3

28:30 That's that's a nice idea.

PHONE CALLER #1

28:32 I'm like really not supposed to be showing this off but you guys know by now that I'm just...

PHONE CALLER #3

28:38 Yeah, we'll keep...

PHONE CALLER #2

28:39 Weird because she told us it was going live and we would have access to it. And then we just never got anything more about it and I just assumed that was because things were changing over and we kinda forgot about it.

PHONE CALLER #1

28:49 No, it just keeps getting pushed back. So the next step for this is to white label it. So it'll be the service trade feature portal or it'll be labeled it'll be rebranded something. So right now, it's user voice, which is the oem like the oem product we're gonna white label it and make it all service trade. But that's as far as I know, it's still in Progress as of this month. And I think the plan is still to roll it out... in may to be customer facing.

PHONE CALLER #2

29:21 Cool. So, does that have like actual dates in it where it's expecting like we could say, hey, what's going to happen in the next three months here? Can we filter on it and see what's upcoming?

PHONE CALLER #1

29:33 I really hope so. One one thing that I have been kind of on my soapbox about since I started here was the secrecy around our road map because of... just because not necessarily fear of competitors, just awareness of imitators, I guess I should say. And there are two competitors to us out there specifically less well, I guess one of them in the fire space and one or two in the hvac mechanical space that... when we announce a new feature, they're usually less than a week or two or maybe three

weeks behind in saying they're doing the same thing. So, when we announced the acquisition of Northboundary, one of those competitors last year, one of those competitors immediately came out with look at our new, our upcoming improvements to our quoting tools. You know, stuff like that. And I think a lot of that... the like just the competition in the market, I think in the past hasn't necessitated that we'd be a little more hush about certain things that we're working on? The problem with that though is our customers can make plans that they don't know what we're working on?

PHONE CALLER #2

30:49 Is it really that much of an issue that customers hot between different services though? It seems like once you're on board with one, you're kinda locked in and it's tough to change.

PHONE CALLER #1

30:58 It.

PHONE CALLER #2

30:58 Almost doesn't matter if your competitors are keeping up or not, unless they're like super far ahead.

PHONE CALLER #1

31:03 It, it does matter when you've got, so there's one competitor in particular, it's and it's not relevant to you guys. It's a company called BuildOps. They're hvac mechanical pretty specifically. But BuildOps for whatever reason, just has a crap loads of money behind them and we'll promise absolutely anything to anyone in order to sell a contract. And so, truthfully, and this all started about a year ago, maybe nine, 10 months ago, but about a year ago... what we're waiting on is for them to hit that 18 to 24 month mark where they're going to start being held accountable for their promises. And if they haven't delivered on them, they're going to run out of cash and they're just gonna go away. But when we started working on this project management stuff a year and a half ago, they came really hot on our tails kind of in the same way. And it just got to be... there. There are people making bad decisions out there to go buy a product that has no track record for delivering on what they promise. And so like I have, I literally have a customer that I'm meeting with at 12 30 today to talk to them about coming back to us from firing us back in December.

PHONE CALLER #2

32:22 Sounds like custom partsledger...

PHONE CALLER #1

32:25 What's that?

PHONE CALLER #2

32:26 Nothing a little bit of a jab at you guys.

PHONE CALLER #1



32:29 I heard something about partsledger but.

PHONE CALLER #2

32:31 Yeah. So.

PHONE CALLER #1

32:32 That insert partsledger here is kind of like always the mean because yes, like, but it took us three years of both pain and rebuilding to finally feel like we have a product that we can put out there and feel good about. And actually maybe three and a half years, something like that. But the history of partsledger is rough for us and it's created some sourness. And this customer actually that I mean with 12 30 has some of that sourness from two and a half three years that they're still carrying. So, yeah, I mean, yeah, we're constantly paying for sins of the past in that regard for sure. Sorry soapbox about competition roadmap, secrecy, all that stuff. Our new VP of product, Jamie, Stella, one of the first one of the first commitments he made to us on the account management and sales teams is that he was committed to more transparency with our customers around our road map. And so a cab last summer in a, in November, he did a whole lot more dealing of roadmap stuff than we've ever done. And this whole, you know, feature portal and roadmap.

PHONE CALLER #5

33:48 This...

PHONE CALLER #1

33:48 Is all stuff in this initiative and he is fulfilling his promise to be more transparent with folks about the road map?

PHONE CALLER #3

33:55 Strategic. Well, so, and we can, we spent too much time because I, but the project management stuff like they're coming on your heels like it's not, and this isn't meant to be a job, I think it will be. But it's not like it's a new way of viewing projects that you've established. It's just your UI. So there's the copying that up the project manage has been around for a long time etc all that. So I like that you guys don't have that would be like kind of common sense stuff to have.

PHONE CALLER #1

34:30 But it's let's say it's a zero entry pool for customers that have a service department.

PHONE CALLER #3

34:37 Have...

PHONE CALLER #1

34:38 Had their project, their Construction teams using different tools just out of necessity. Yeah. So it's a zero entry pool for those folks to say, hey, you've been running your service business and service trade for years. We're going to give you

some tools to better manage your retrofit upgrade and Installation jobs plus make it easier. So we've I've got a customer in Indianapolis, Ryan fire protection, who, their service division is about half the size of their Construction and they've got when Construction slow. They have guys that bounce back and forth. And so being able to provide those guys with tools that they're more used to from that perspective is very helpful for them.

PHONE CALLER #3

35:20 And then the other comment on this was for the roadmap stuff couldn't you guys just put like, can you do strategic customers only and then put us on an nda?

PHONE CALLER #1

35:32 That's that's so there's going to be a conversation about who are the first 100 people we let in here and you guys?

PHONE CALLER #3

35:39 I mean, I'm sure we would sign it and like, hey, we won't tell anyone. So about what you're doing, just tell us?

PHONE CALLER #1

35:44 That's I think.

PHONE CALLER #5

35:45 I...

PHONE CALLER #1

35:46 Don't know that there's going to be an nda necessarily, there might be a Ula that you scroll through and don't read that you accept when you sign in but... something like that, there may be something like that, but it is going to be a smaller release at first and it will be customers like on core that are in their first.

PHONE CALLER #3

36:05 Cool. All right. What else... to just touch on the one? So I approved as the tool for the recurring items for service items... that's...

PHONE CALLER #5

36:25 That until I get back?

PHONE CALLER #3

36:27 Yeah, yeah, no, I'm not your time line. That's fine.

PHONE CALLER #5

36:32 You doing?

PHONE CALLER #1

36:34 What?

PHONE CALLER #5

36:34 That I...

PHONE CALLER #4

36:35 Didn't...

PHONE CALLER #1

36:36 Yeah. You're welcome.

PHONE CALLER #3

36:38 Yeah, I didn't approve the time card API wouldn't yet and I know that was a little, we talked about that, but the 4,000 kinda sent me a little bit of a loop for an API to download a CSV... an.

--- Pricing ---

PHONE CALLER #1

36:54 The...

PHONE CALLER #3

36:56 A P, I what?

PHONE CALLER #1

36:58 So, do you want me to make it eight? I'm I have no.

PHONE CALLER #3

37:04 No control over? Yeah, it'll be in a year. It'll be 10,000 a year, and I'll say, should I should have paid the four? No, and it's not, I'm not saying we won't do it. And Matt, you can expand on this too because I think you and I talked it's just like well for... is it less painful for us to just look at the new one and figure out if there's a path forward to retool our process to fit the new one that exists today without spending the four day? I don't know Matt, do you have a goal reaction to this or not? But that was kind of where that was my only comment as to why I haven't approved it yet.

PHONE CALLER #2

37:46 I mean, my thought was more along the lines of for four K, I could pay someone to spend two weeks dedicated to just building our own entire time card tool that would do exactly what, when you get, instead of trying to make the one you guys have fit with our business. So, I guess I was a little confused too because when we had talked with them a while ago, it sounded like this was like an easy thing that they

could just kinda add. It didn't seem like something we were even going to be charged for. And it's existing functionality in three. I don't understand why you've removed functionality from the one that's now like paid kinda in air quotes because it's built into the contracts, but I... don't know we have a less functional tool that, you know, want us to pay more for just to get it to work, how the old one used to.

PHONE CALLER #1

38:37 So the, well, a couple of things on that one is I don't remember if you were on this call, Matt. I think I told Justin we're actually not going to charge you anything for service time card like this. There's no subscription cost for giving you the new tool, just like there was no subscription cost for giving you the toolbox tool. That's not true for everyone. So if you go to D WC next year and you're telling everyone that service tray gave us service time card for free, I'm going to be upset about that. And so is everyone else here and probably a lot of sad other customers that didn't get that.

PHONE CALLER #2

39:13 I heard it explain was it was just rolled into our contract and we negotiated one total price. So I wouldn't consider it free necessarily just as part of the overall agreement that we renewed and gave X number of dollars per year. So I wouldn't really tell people.

PHONE CALLER #1

39:28 Yeah.

--- Pricing ends ---

PHONE CALLER #1

39:29 There's a, there's an aspect to that. But... the old toolbox time card was kind of a like we'll give you this because we're not investing a ton in it... that's what was on the table at your last contract negotiation, not the new one. From what I, from what I know obviously it wasn't a part of it, but from what I know that was the case and I could be wrong if someone here is wrong about that, it's probably me. But from the new service time card, yes, like there's not parity in every single aspect. But there are a lot of things in the new service time card that people had been asking for years in the old time card that we weren't able to develop on the old platform is like the being able to configure additional rows for without having to create a vacation job or training job for somebody to clock into being able to do a expenses as like coded job, items... being able to like have a customizable export template tool in the app, which for you guys isn't relevant because you want your stuff in a different way. But for many of our customers, it was extremely relevant because they didn't have a great means of getting clock event data out of service trade into a format that they could just drag into Quickbooks or Computerease, or some other system. So, there are a lot of things that we invested in service time card that make it a whole lot better for a whole lot more people. Just one thing that we haven't done yet. And this kinda goes back to like John, John's whole idea of what do we have to pay to get this faster? Is the API piece like a year from now? Well, we have an API regardless of what on core decides to do. Maybe. But if the ask is we need this to make this tool work, give it to us faster. That's how that goes.

PHONE CALLER #3

41:27 Hi... Mary. This is not like a big sticking point. I was just... really... can just that's I should tell you, I have approved, yeah, because we're...

PHONE CALLER #1

41:47 Yeah.

PHONE CALLER #3

41:48 I want to get... by in.

PHONE CALLER #3

41:59 Do the functional wise, I think it's a lot more functional too because they go where discrepancies. Exists. They can go right into the job from there and do all that stuff without ever like bounce around.

PHONE CALLER #1

42:09 Yeah. So you can click directly to the ServiceTrade job from time card. And if you're doing, if you're doing payroll based on labor items, you can actually edit the labor items from the time card screen without going to the job. Now, word of caution about that. If that labor item, like if you've already built that job and completed the job in its entirety, there's not going to be a flag currently that says, hey, don't edit this labor item for this person's payroll because that jobs already been billed or whatever. So we, for now, we very much go with the use the inline editing feature with extreme prejudice. But it's there for folks that absolutely must have it because there are, we do have some customers that don't Bill out their, that don't Bill out their jobs very quickly. And so they feel confident that if they edit, if they edit somebody's labor items in a given week that the job is not going to get billed till the following week anyway.

PHONE CALLER #3

43:17 Yeah. It's I mean, this is, this changes to the many not for the one and where the one?

PHONE CALLER #2

43:27 We're usually the one.

PHONE CALLER #1

43:30 You are, you are a lot more often than some others we do have. So just so you know, you're not alone in this. We have two other customers. I don't know if I'm supposed to say their names or not. They're fairly large though, and they're always at our stuff when we have events, but it's not marmic, I know you've spoken to, but we have two other customers that in the fire space that saw we purchased Northboundary, and they were like, hey, that looks like a really cool quoting tool. Can we use that for fire? And we're like, no, this is just for H back mechanical. And they said cool, how much do we have to pay you to make that work for us in fire? We gave them a number and they're like cool checks on the way get started.

PHONE CALLER #2

44:19 That for service or for T and I.

PHONE CALLER #1

44:22 For, for inspection contracts?

PHONE CALLER #2

44:25 Really, can we write you a big check too to have you do that? So I don't have to do it.

PHONE CALLER #1

44:33 I can let you talk to the people who are working on it because I, so the other two customers are working on, I think they know each other and you guys, I mean, it's Virginia sprinkler and hiller?

PHONE CALLER #2

44:45 No, Heller, I haven't heard of Virginia sprinkler?

PHONE CALLER #1

44:48 Yeah. Virginia sprinkler is becoming very large very quickly, but they came to us and we're like, hey, we need, you need to build this into a quoting tool for us for inspection contracts. And we're like, well, okay. Here's, what that's gonna take and they're like whatever, just do it. So.

PHONE CALLER #2

45:09 Yeah. We're looking at using Hubspot now to kinda use another tool to build the data and then use Hubspot to generate a PDF and send it to the customer and all that. So, if we could do it all inside of service trade, that would be amazing.

PHONE CALLER #1

45:23 Matt, if I, so it's a, it's both a survey tool and a proposal generation tool. So like your sales people will go out with the proposal tool and collect the asset information and then that.

PHONE CALLER #2

45:37 Right. That one's a deal breaker then they refuse to not use a pen and paper for that.

PHONE CALLER #1

45:42 Gotcha. What? Matt, if I sign you up for a webinar next week, will you come, will you look at Northboundary?

PHONE CALLER #2

45:51 Yeah, absolutely. Sounds awesome.

PHONE CALLER #1

45:53 They have, they have and...

PHONE CALLER #2

45:57 What's...

PHONE CALLER #3

45:58 The time line?

PHONE CALLER #1

46:01 I don't know, man. I did not bring this up. So you guys would grill me about Northboundary, or brought this up. So you're not the only one writing big checks to get things faster.

PHONE CALLER #3

46:10 This is what?

PHONE CALLER #1

46:11 They...

PHONE CALLER #3

46:11 Call our can of worms.

PHONE CALLER #1

46:13 So...

PHONE CALLER #2

46:14 Will say this is very top of page for us. We've been talking about a lot about the last couple of weeks, so.

PHONE CALLER #3

46:21 So, just to put this in contact, so you don't... we're trying to revamp like our entire like sales enablement process.

PHONE CALLER #1

46:29 Okay.

PHONE CALLER #3

46:29 And right now, it's kind of three different products. One is some excel homegrown stuff that predates I think almost everybody in on core and it's just ugly and painful and it's not locked down anyway, but Hubspot is the CRM kind of the lead piece of it and then obviously, whatever restrain. But if this is like... depending

on what's there... maybe we wanna pause on all this and we wait for that to come around and we figure out how to utilize that.

PHONE CALLER #1

47:07 I was...

PHONE CALLER #3

47:07 Told...

PHONE CALLER #1

47:08 Recently as last Wednesday to not bring anybody else into.

PHONE CALLER #3

47:14 Early.

PHONE CALLER #1

47:15 Adopters fire of Northboundary for fire companies.

PHONE CALLER #2

47:18 You made it a week. So that's good.

PHONE CALLER #3

47:21 No. You, did anybody, we're not anybody?

PHONE CALLER #1

47:24 I know.

PHONE CALLER #3

47:24 For somebody.

PHONE CALLER #1

47:26 I'm like regretting using that as.

PHONE CALLER #5

47:29 Very...

PHONE CALLER #1

47:30 Recent example though with VC and hiller, where they're like give us a better quoting tool. And... Matt, the next webinar for Northboundary is next Thursday at noon. If you're free, I'll send you the registration link for it if you want to see it.

PHONE CALLER #2



47:51 Yeah, absolutely. I'll try not to quit before then.

PHONE CALLER #5

47:56 Okay.

PHONE CALLER #2

47:59 Just in just.

PHONE CALLER #5

48:01 So, I'm so.

PHONE CALLER #1

48:02 I'm so looking forward to.

PHONE CALLER #3

48:03 This conversation.

PHONE CALLER #1

48:04 With skip next week when he sees the register and for these things like what the fuck is on core doing on this list?

PHONE CALLER #3

48:10 Here's, the here's done. It's gonna be, can I go to it too? Or is it just Matt?

PHONE CALLER #1

48:18 No, yeah, sure.

PHONE CALLER #3

48:20 So, you tell them, hey, skip it's on core, but they're keeping John out of it.

PHONE CALLER #1

48:26 Okay.

PHONE CALLER #3

48:27 That's a W, right? I mean, on core sans John, that's a lot less than on core with John.

PHONE CALLER #1

48:33 Okay.

PHONE CALLER #3

48:35 Don't get yourself in trouble. I mean, we can.

PHONE CALLER #1

48:37 It's it's fine. It's I'm just, I'm excited to hear him come ask me about it, and I didn't... but I'll tell him like, I mean, and hopefully I'm being truthful when I say this, that they don't need this tomorrow. So don't make me a liar.

PHONE CALLER #3

48:57 We need a...

PHONE CALLER #2

48:59 It's more so about like we need to plan internally for what we're doing. And if that means this is two years out, then we'll figure out our own solution. If this is, then why would we bother building our own thing?

PHONE CALLER #1

49:12 That's that's fair.

PHONE CALLER #3

49:14 We're talking 18 to 24 months, we need to find an interim piece and we probably put less effort into that intern piece just to make ourselves savageable.

--- Pricing ---

PHONE CALLER #3

49:21 And because right now it's a good problem we have and also feeling paying more than either me or Matt is we have more ti to load into service rate then we have three ability to load. So we're sitting on like a revenue backlog sitting in ti of like 150, 150 contracts that need to be entered. And that backlog has been like consistent for like three months. So that's not great, right? Because we're trying to slide in and do inspections. We don't show up when the contracts sold. We don't enter it for six weeks. Someone else slides in takes an inspection. We just paid a rep for a comp and so that's a rep for us. So, yeah. So that's a, on if it's 24 months out, then? All right. Fine. We're going to go down our own road.

PHONE CALLER #1

50:06 No, if...

PHONE CALLER #3

50:06 We talk over later.

PHONE CALLER #2

50:08 It's...

PHONE CALLER #3

50:10 Six months out then like, holy shit. Let's just put all this on hold and weight because we've got plenty of other stuff to do too.

--- Pricing ends ---

PHONE CALLER #1

50:16 Yeah, it's definitely faster than two years because VC and hillier, would, they would not tolerate a two year time line for this.

PHONE CALLER #3

50:28 Are they using base?

PHONE CALLER #1

50:31 They're not, they're not my customers. I have no idea. I just know I was part of a meeting, I think last Tuesday or Wednesday where they said, hey here's, what's happening with this? These are our two folks that are, these are our two customers who are kind of spearheading and in practice.

PHONE CALLER #3

50:48 Early.

PHONE CALLER #1

50:48 Adopters here, we'll keep you in the loop on how this progresses basically was the messaging... yeah, so.

PHONE CALLER #3

50:58 But, absolutely.

PHONE CALLER #1

51:02 The...

PHONE CALLER #3

51:02 Yeah.

PHONE CALLER #1

51:03 I just sent you guys a link Alexander. Do you wanna sit in on that too?

PHONE CALLER #3

51:06 You guys, you got? Yeah, she does, she's she off the.

PHONE CALLER #5

51:12 No, I'm here. I don't know. Am I gonna be here for?

PHONE CALLER #3

51:15 Yeah, you're she's on a cruise in the caribbean.

PHONE CALLER #5

51:17 Yeah. So if you guys want to bring a picture of me, I'm okay with that?

PHONE CALLER #1

51:23 Where, where are you leaving?

PHONE CALLER #3

51:25 Yeah.

PHONE CALLER #5

51:27 And my taste in my tasteful, one piece, right? Because I have no business wearing two pieces of anything.

--- *Small Talk* ---

PHONE CALLER #3

51:36 The...

PHONE CALLER #2

51:36 I...

PHONE CALLER #5

51:37 Could do a three piece. I don't know what that looks like, but I imagine it includes a mask.

PHONE CALLER #1

51:42 Is a cover, but with the, with three.

PHONE CALLER #5

51:46 It leaves that in New Jersey and then it'll go to Florida. It'll do two stops in Florida. So, port Cabral, and then Miami, and then it goes to the caribbean.

PHONE CALLER #1

51:57 Nice.

PHONE CALLER #5

51:58 This is that cruise. Everyone was supposed to come with me on Matt, a little disappointed because you were supposed to come, but.

PHONE CALLER #2

52:04 I am more disappointed than you are. I think I would love to be on that cruise and drink with old ladies.

PHONE CALLER #5

52:11 Yeah, that was not reference to me just so no.

PHONE CALLER #4

52:16 It's...

PHONE CALLER #2

52:18 What your gas ninetieth birthday?

PHONE CALLER #5

52:20 My grandma ninetieth birthday?

PHONE CALLER #1

52:22 Old ladies in their pieces.

PHONE CALLER #5

52:23 No, they're tasteful, three pieces have some respect.

PHONE CALLER #1

52:28 That's right? Yeah. My grandmother who has passed, she would drink a glass of old crow on ice in the morning and then go play 18 holes of golf drinking and smoking cigars the whole time and come home and sit on our front porch and drink. And I think she ate probably less than 800 calendars worth of food a day, but drank her weight in old crow, which is discussing if you've never had it?

PHONE CALLER #5

52:57 Is on crop.

PHONE CALLER #1

52:59 It's a whiskey, but I honestly don't know what else to tell you about it other than I think it's a whiskey.

PHONE CALLER #2

53:05 Southern comfort.

PHONE CALLER #5

53:07 Back, hold on.

PHONE CALLER #1

53:11 Yeah, it's a 15 dollar bottle of urban.

PHONE CALLER #3

53:14 Yeah. My used to drink be on the rocks.

PHONE CALLER #5

53:20 Be, is not the.

PHONE CALLER #1

53:22 Worst thing I've ever had.

PHONE CALLER #3

53:24 She was, she was a child of a depression.

PHONE CALLER #1

53:28 What is, what is good? Is, well, I don't know that this is distributed outside of North Carolina, but there's a soda called sundrop... that when mixed with Jim beam, you have a sunbeam and it is.

PHONE CALLER #3

53:48 What sundrop was a flavor like?

PHONE CALLER #1

53:50 It's like a liminlime kind of thing, but...

PHONE CALLER #3

53:53 Yeah.

PHONE CALLER #1

53:54 Somewhere between mountain dew and seven?

PHONE CALLER #5

53:57 It's like my pineapple soda that you love Justin.

PHONE CALLER #3

54:00 So, weird.

PHONE CALLER #1

54:02 Is it, is it the pineapple Pan to, because that junk is.

PHONE CALLER #5

54:05 Yeah. Justin's like a high and mighty about it.

PHONE CALLER #1

54:07 It's delicious.

PHONE CALLER #3

54:10 I get a Ford of cars in my Zona too... like in that, I'm pretty sure in those Fanta, gray pineapple everything, it's like 92 grams of sugar for the bottle.

PHONE CALLER #1

54:22 Yeah. Probably do we have, do we, can we get to the items thing?

PHONE CALLER #3

54:27 Yeah, yeah.

PHONE CALLER #1

54:28 Doing down even?

PHONE CALLER #3

54:30 No, we don't have to dive into it and we can just also not do it in four minutes. We can send you an email. You just want an example of what the UI looks like.

PHONE CALLER #1

54:36 Yeah. If you want to send me like a loom video and show me, hey, here's, what you're seeing like because you're talking about the fields where you can't enter like enough data or you're having to like.

PHONE CALLER #3

54:46 Yeah. As one, do you have, do you have server straighten up right now? I can use looks?

PHONE CALLER #5

54:51 What am I holding for?

PHONE CALLER #3

54:53 When they can add items to a job and it shows like.

PHONE CALLER #5

54:56 The, the large comments.

PHONE CALLER #3

54:59 No, not the URL issue like adding items to the job and it shows.

PHONE CALLER #5

55:06 A 1,000,000 print.

PHONE CALLER #3

55:08 Lion items and then you can't even read the whole like list because the field is too small.

PHONE CALLER #5

55:13 Yeah. Hold on, share on. You guys need to get out of.

PHONE CALLER #3

55:19 Yeah. Get on teams.

PHONE CALLER #1

55:20 We're no, we're will never be on teams. We're actually in everyone in the org is going to Google meet in a few weeks reading it, Google.

PHONE CALLER #3

55:29 Crashed.

PHONE CALLER #1

55:31 I'm dreading it.

PHONE CALLER #3

55:32 Like I have my email, but I hate Gmail.

PHONE CALLER #1

55:36 I spent eight years before service trade evangelizing against Google and for Microsoft and now...

PHONE CALLER #3

55:46 Buys outlook search capabilities, but Gmail, like threading of emails is might be the worst thing I've ever see.

PHONE CALLER #1

55:55 Turn that off. I have, I turn that off the.

--- *Small Talk ends* ---

PHONE CALLER #3



55:58 No, yeah, I've turned it off, but I still like even when you like click reply, it puts like your most recent email at the bottom, but they're most recent at the just.

PHONE CALLER #1

56:06 Yeah.

PHONE CALLER #3

56:06 It drives me insane. I'm lucky, I don't have a lot of times.

PHONE CALLER #5

56:13 All right. This is where I'm at with the multiple items.

PHONE CALLER #5

56:23 I...

PHONE CALLER #3

56:24 So, this isn't as bad as the time.

PHONE CALLER #2

56:27 To, are you, so.

PHONE CALLER #5

56:29 I think sorry?

PHONE CALLER #2

56:32 Mobile app is where the text, I would probably think.

PHONE CALLER #5

56:34 Yeah, mobile app and also, there's been a recent thing where if I click invoice job, if there's a blink come incredibly long here and it goes all the way out. This gets like this screen right here is like the size, it's this tiny.

PHONE CALLER #1

56:54 If you can, if you can either send me a screenshot or a loom video.

PHONE CALLER #5

56:59 I was just talking to me about it, right? Hold on.

PHONE CALLER #2

57:03 We have a support ticket open, I think.

PHONE CALLER #5

57:05 You, I'm...

PHONE CALLER #3

57:06 Pretty sure it's me you John and Matt Alexander, we're talking about on Friday?

PHONE CALLER #5

57:10 I'm gonna stop sharing is, you know...

PHONE CALLER #3

57:14 Here's a screenshot in that email. Can you can just forward to take all mark banter back and forth?

PHONE CALLER #1

57:21 Okay.

PHONE CALLER #3

57:24 Yeah, it's nothing you're gonna fix right away. Don't just more like fyi, guys this happens.

PHONE CALLER #1

57:28 Yeah, it's I mean, stuff like that. If I haven't I mean, if I just legitimately, I've never seen it before then.

PHONE CALLER #3

57:33 It's it's our own fault because people are pasting like urls apart they want ordered and the URL or like, you know, five lines.

PHONE CALLER #2

57:45 Well, it's not really our fault. So, service trade admitted that they just haven't set it to wrap text on URL, which seems like.

PHONE CALLER #3

57:55 You say that or put it in like there's a limit on URL.

PHONE CALLER #1

58:00 I wonder if also that's a markdown limitation because it's not Rich text. And if we can't if in markdown, we can't wrap without like a hyphen or a slash or a period, I wonder if that has something to do with it. Reason. The reason I say that is because I heard through the grapevine that one of the things that are strongly considering for H2 twenty three or H1 twenty four is converting from mark down to Rich text in some entities. And I wonder if that would have something to do with that?

--- Small Talk ---

PHONE CALLER #2

58:41 How would that work if we're like exporting stuff and reimporting it? Is it gonna lose all of the Rich text?

PHONE CALLER #1

58:48 I don't know... like I said, it's a thing that I heard mentioned as a we're looking into this. And so, honestly, I wouldn't expect anything this year. It was an idea that was floated in a product meeting a month or two ago, and I was just like that would be cool because I have one or I had one customer in Ohio last year who swore to me, he couldn't use quoting and ServiceTrade because he couldn't make text red on the quote... and I was like your customers will only approve quotes with red text then... that just seems like you've trained them poorly.

PHONE CALLER #2

59:29 I feel like I've seen bolded text on our quotes though.

PHONE CALLER #1

59:32 You can do, yeah, you.

PHONE CALLER #5

59:33 Can...

PHONE CALLER #1

59:34 But you can't change on style and you can't change color.

PHONE CALLER #1

59:41 I have to run, but I will look out for that email with the screenshot.

PHONE CALLER #5

59:46 And...

PHONE CALLER #1

59:48 Yeah, I will catch up with you guys next week.

PHONE CALLER #3

59:50 Thank you.

PHONE CALLER #1

59:51 Have a great time when you priest.

PHONE CALLER #5

59:53 I'm gonna try to get that real Tan. You got that one, so.

PHONE CALLER #1

59:56 You wanna see the lines?

*--- Small Talk ends ---*

PHONE CALLER #5

59:59 There we...

PHONE CALLER #1

1:00:00 Go.

PHONE CALLER #5

1:00:01 I will try to recreate that.

PHONE CALLER #1

1:00:02 Nice little gradient right here. Call can gradients...

PHONE CALLER #3

1:00:07 Nice.

PHONE CALLER #5

1:00:08 Bye.

PHONE CALLER #1

1:00:08 Call me benjamins. Watches.

PHONE CALLER #5

1:00:13 All...

PHONE CALLER #1

1:00:13 Right. I'll see you guys.

PHONE CALLER #3

1:00:14 Bye.

*The End*