



# **ServiceTrade Demo with The Rapallo Group**

Quinton Stallings with The Rapallo Group  
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## **Participants**

### **SERVICETRADE**

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*Territory Manager*

Charlie Riddle  
*SDR*

### **THE RAPALLO GROUP**

Patrick Noles  
*President*

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# Transcript

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--- Call Setup ---

QUINTON

0:00 Hey, good morning, Patrick.

PATRICK

0:01 Hey, good morning. How are you?

QUINTON

0:03 Going well. Is it, is it Pat or Patrick?

PATRICK

0:05 It is fine. I got much people on Pat.

QUINTON

0:09 Cool. Well, Pat, my name's Quinton stalling, it's nice to meet you. I, one of the territory managers here over at service trade. So I appreciate you taking some time to meet with me today. I had a quick conversation about you and Charlie's call and kinda the plan for today's me just to learn a little bit more about you guys. I know that you're in the process of purchasing a couple of companies in interested in some software.

--- Call Setup ends ---

QUINTON

0:30 So really just want to hear from you some of the needs that you're looking for. We'll take a quick dive into the product today, go through kind of what service trade helps our customers with. And then if it sounds like a good fit, we can break out next steps from here as far as a time on what things will look like if you were to acquire those companies.

PATRICK

0:47 Cool. Yeah. So basically we're looking at two commercial refrigeration companies that are largely service and repairs both. Obviously, we close on both, we combine them and make one one company. But right now neither company has any like software they're using in the field or, you know, any sophisticated software basically. So in my last business, I, you know, implemented a similar software and it makes difference, obviously saves a lot of time and stuff like that. So this seems like there's a

pretty, you know, pretty obvious opportunity to do that. This business is pretty much all like reactive like emergency service. So dispatching is a huge time suck right now for both companies. And there's like three admin total who are basically doing all the dispatching. So that's kind of the top priority at this point, trying to find a program or software that will, that makes that as streamlined as possible. And then obviously like, you know, the features tracking and invoicing, all project management stuff like that is all, you know, kind of the secondary priorities. But I, I've done a couple of demos at this point. I maybe like two, I think three different companies and I'm just trying to figure out, you know, what's the best fit to number one priorities, making this matching, you know, dispatching to be more streamlined. Number two is probably being as user friendly as possible, you know, because as I'm sure you guys having a lot of customers, the text are pretty been doing it the same way for a long time. So I really just want to be able to make it where it's as simple as possible, for those guys. But yeah, it's pretty much we're all 100 percent commercial. So there's no residential customers at all. But yeah, it's kinda the gist.

QUINTON

2:35 Awesome. What else were, what were those other softwares that you taking a look at?

PATRICK

2:39 Yeah. So I talked to service tighten commercial, talked to super and what was the other one? I forgot. The other one was BuildOps BuildOps. Yeah. So.

QUINTON

2:54 Yeah. I mean, you know, work order management, a lot of softwares today, especially.

PATRICK

3:01 Like certain.

QUINTON

3:01 Management solutions. They're going to have, those basic needs we can 100 percent help you with. But I'm just curious kind of what's your goal for these companies? Is it to get out of more of the reactive side and get more into the predictive predictable revenue as far as like PMS and.

PATRICK

3:17 Yeah.

QUINTON

3:18 I...

PATRICK

3:19 Mean, I guess, so, yeah, I mean, it's that's yeah, that's one one opportunity. I think ideally, I'd be looking to add on other smaller contractors, you know, down the

road. So, I mean, yeah, I guess I don't know. It's really like hot topic right now, the recurring revenue and the preventive maintenance. But I mean that's not definitely not a focus like in the near term, you know.

QUINTON

3:41 Okay. And, what is your background? You mentioned you had a company before that you own?

PATRICK

3:49 Yeah. So it was a property maintenance company. Our main service is parking lot sweeping. So we serve like exterior services for commercial properties. So that business, most of it was parking lot sweeping, you know, which is on overnight. But that business was all about just scheduling. So, you knew, months in advance what you're doing each night, you know, is current like almost like nightly. So that was really, it wasn't so much just was not an issue. You know, you make the schedule, you tweak the schedule as it goes along and then you just upload it. We use go canvas for that which, you know, I see like a, I haven't looked at this in a while, but like the rankings go canvas is always the class. I feel like how it ranks up with you guys, and other providers. But, you know, the, that was something that the implementation was really hard. Just took a lot of effort because it's just me and another girl in the office doing it on top of running the business. Obviously. So that part was tough. But the benefits like I flipping a switch, you know, I was like immediately better in every way. So that's why this is like a top priority, you know, trying to get this ball rolling early on.

--- Pricing ---

PATRICK

4:56 And I can tell you as I've looked, I mean, it made such a big difference in my day to day, but also save us a lot of money. So I honestly, I'm surprised because there's not many things I like this about but I'm not like that cost is not a, the number one driver. You know, in this decision, it's like, I know the savings are going to be there. So it's like if I have to pay a little bit more for one provider versus another, assuming it's you know, in the same ballpark, I guess I say, I've already been sold. I've already pulled the trigger. I've seen the benefits of it. So I was like a sales pitch. It's just like trying to figure out what's the best for this particular service, you know? So.

QUINTON

5:34 No, I get sometimes my jobs consist of, you know, providing the value, so people can understand.

PATRICK

5:41 Yeah.

QUINTON

5:42 You'll have to pay, some money to get a good software that, that's the right?

PATRICK

5:46 Yeah.

QUINTON

5:46 So, it sounds like you've seen, the benefits of finding a good solution, and you'll you're able to pay, to get that. So glad that you kinda went through that process before. As far as a timeline, I know Charlie said that you don't have the companies acquired yet, but do, you know, kind of when that deal would get done? And when?

PATRICK

6:07 I...

QUINTON

6:07 Have something in place by?

PATRICK

6:09 Excuse me, I would think like the three months out there for him. You know, it's not really early on anymore in the deal, but it's like still early for this type of conversation, I think, you know, but I would say three months is, I think we'd be closed on both companies in three months is conservative. I think it could be well before that. But, so, yeah, I think around that time, like I said, this is pretty top of the list. So I would say getting the ball rolling sooner than that would be possible, but pulling the trigger on something I guess, but I threw three months out there just to be, you know, have a benchmark.

--- Pricing ends ---

QUINTON

6:51 Okay. Cool. Yeah, just kind of getting your ducks in a row for.

PATRICK

6:54 Yeah.

QUINTON

6:55 Gotcha. Yeah. Well, awesome. Well, I'll what we'll do is I'm gonna go through some quick slides just kinda tell you a little bit about service trade. We're gonna take it to the platform again. And then if you have any questions throughout the meeting, feel free to interrupt me.

PATRICK

7:08 Keep...

QUINTON

7:08 More of a conversation that way I can get any questions answered for you.

PATRICK

7:11 Okay.

QUINTON

7:12 I'm gonna turn my camera off just so my internet stay stable today and.

PATRICK

7:16 Okay.

QUINTON

7:26 All right. So, can you see the screen here? It says server straight on the right hand side.

PATRICK

7:28 Yeah, cool.

QUINTON

7:31 So, we were designed specifically for commercial service contractors. We got our start in the fire and life safety industry. And since we branched out to mechanical, have about 1,200 customers right now that, are using the platform and you might be familiar with some of those companies here. Really, you know, our goal is to help commercial service contractors be more valuable to their customers. And in turn help you guys grow your business as, you know, it's what a software I suppose to do. It shouldn't be something that you have to mandate or mold to your processes. We're really about only working with commercial contractors especially when it comes to mechanical and fire life safety companies.

PATRICK

8:08 Got you.

QUINTON

8:09 But we help our companies grow in a few ways. The first is just operational efficiency, you know, streamlining your dispatching process. So text are getting to more jobs throughout the day, better communication back and forth from the field to the office. Also, you guys can get the most out of the resources that you have. So you don't have to hire additional people in the office or even add more technicians to grow your business.

PATRICK

8:32 Gotcha.

QUINTON

8:34 Second is just helping you guys attract and maintain new customers, a lot of platforms today, you know, like I mentioned, help with managing work orders and dispatching, but really where service trade separates itself is through the customer experience. So we're going to help you guys enhance the level of customer service you

provide with things like an online customer portal where your customers can log onto your website and approve quotes, pay invoices, view upcoming services, request service all just to make it like that Amazon like experience. So, you know, you can maintain those customer relationships and able to sell more to your customers as well. And then the third and perhaps most significant way that we help our customers grow is through our quoting features. So we basically make it really easy for the technicians out in the field to record repair opportunities. We then make it easy for you guys in the office to turn those repairs into appealing quotes with pictures, videos, different types of media, and attachments, and then easy for the customer to approve that quote. We just click the button. So really this is how our customers right now are experiencing around a 23 point four percent increase in service revenue per tech each year. So that was just a high level overview of service trade. But do you have any questions before we get into the product?

PATRICK

9:52 No, not really.

QUINTON

9:54 Okay, perfect. All right. So I'm gonna walk through three different views of service trade today. We're gonna go through the office view, the technician view, and then also the customer view. I'll show you what the customer would see on their end. But we're gonna start here in, the office view of service trade. And what you're looking at is the service dashboard. So this is just basically a high level view of your service department as soon as you log in. So you'll see just a snapshot of the daily schedule. You're going to be able to see this in more detail on the dispatch board that I'll walk you through it in a minute, but then also where your techs are as they clock in and clock out of their jobs throughout the day. These buckets here, you'll have an overdue jobs without appointments bucket. It's a great way to make sure things aren't slipping through the cracks, whether it's a hearing service or a service that's due for like a repair that needs to get done later, you know, in the month or however, you know, long it may be just to make sure that those, you know, are getting on the calendar... you can see all of your jobs that are upcoming in the next two weeks that need to be scheduled... any past jobs to be marked complete. This is a checks and balance process. So basically, you know, the technician out in the field completes their work order. It's gonna show up here in this bucket for the office to review, make sure everything looks good on that work order before you invoice that out to the customer and for all those jobs that we have reviewed and they're ready to be invoiced. They drop into this completed jobs bucket just to, as a reminder. Hey these need to go out to the customer as well.

PATRICK

11:23 Gotcha.

QUINTON

11:26 Any questions about the service dashboard?

PATRICK

11:29 No, pretty straightforward.



QUINTON

11:32 Perfect. We'll take a look at the dispatch board real quick. So we have two main ways of schedule in service trade. One's gonna be more of a reactive way, which probably suits you guys best right now, on the dispatch board, you have all your technicians on the left hand side here. They have what we call their own swim lanes, and then their jobs are going to be updated in real time here on the board. So we don't have a lot of people working today, it looks like. But Brett here in south Texas, you know, as Brett is clocking into this job, you're gonna see in real time, all the updates about brett's job. You can click directly into this work order and view everything that Brett is doing as far as parts that he's putting on his work order pictures that he took repairs that he might have found all that is going to be in real time as Brett working in the field.

PATRICK

12:21 Gotcha. Yeah.

QUINTON

12:25 Have your available job section here. So, these are basically buckets of jobs that we know are in the queue whether they are service calls that we need to get to emergency service calls and install, whatever it may be. But all you have to do is click and drag these jobs down onto the calendar. So for this service call here, you know, I wanna put Alex on this job later today at 11 o'clock as I drop that down on Alex calendar, he's notified with a notification saying, hey, you have a schedule update at this place in Maryland with all the details about that job. You're also able to assign these jobs. So I'm gonna move this down here.

PATRICK

13:04 Quick, quick question that reminds you of something else that's all. So they, right, when you drag it, they get notified right away. Is there a way to change your, where basically you can put it on? Because if you drop in the wrong spot, for example, it notifies the wrong person. Is there a way to like change or where you don't they don't get automatically notified?

QUINTON

13:21 Yeah. So we have a released and UN release button here. You have your jobs to be always UN released. So I can move this job anywhere I want to with no notification being sent to the tech especially if you know, throughout the day, you're not quite sure yet who can get there.

PATRICK

13:37 Yeah.

QUINTON

13:38 Reason, Brett can't we want to move this down to Charlie's job or schedule. And once we know Charlie can get there, we can then release that job to Charlie and he's notified.

PATRICK

13:47 Gotcha.

QUINTON

13:51 And then we have the ad job button. So maybe this is something that the customer calls in. You know, we have the long horn stake house. I can, it's gonna pull up your customers contact. So we wanna do the one here in Ohio. It will fill in all their information. You can decide what type of call it's gonna be. So I'll say it's an emergency service call. We're not quite sure what technician we want on this, but if you want to add a tech to this, you can cool. We'll say it's for today, around noon, can give it a description of the problem. I'm just gonna say something is wrong. And then if, you know, what piece of equipment, so the customer calls in and says, hey, it's our electrical panel or it's our hvac unit.

PATRICK

14:38 Yeah.

QUINTON

14:38 Like that piece of equipment based on that customers equipment list and give it a quick description here as well. Diagnosed on site and say, picture... once you hit save, it goes into that unassigned section up here at the top. And now we can take this job and bring it down to whatever technician can take it. So I'll give that.

PATRICK

15:02 Cool. So that whole top part is not, it's a queue that's kind of like whether they're not assigned up there.

QUINTON

15:09 Exactly. Yup.

PATRICK

15:10 Yeah, makes sense. This, I gotta be honest is so far, this seems like a lot more user friendly than the other ones I've seen is like it's kinda shocked at how the dispatch board has so much information. So, these are the programs just like this is kind of a lot to somebody to do, you know?

QUINTON

15:25 That's the idea behind it. Because, if you have all these different buttons and, you know, all these features, you kinda just get lost in all the information.

PATRICK

15:33 Yeah, yeah, exactly.

QUINTON

15:35 We, we try to make it as visibly easy, to look at, but also, you know, a call comes in quickly, add it to the dispatch board or grab an available job. It's really the main things that you need.

PATRICK

15:49 Yeah. Got you.

QUINTON

15:50 Any other questions about the dispatch board?

PATRICK

15:53 No, I don't think so at this point.

QUINTON

15:54 All right. Awesome. To give you an idea of how customers and locations are organized. Given the fact that we are specifically designed for commercial contractors, we get, the distinction between that Bill to and ship to address. So, for this long horn stake house, headquarter orders page, you can manage the different locations that a customer might have. So, you know, for this long horn stake house, we also service the one in Pennsylvania, the one in Ohio and in Michigan, and each of these has their own page that you can click into and view all the information for that one site. So, for instance, this one here in pa, you can see all the contacts here at that site. You can keep track of the services that are due. This is where you can set up any recurring services like, any PMS you might have or, you know, a repair that needs to get done. All these, you can keep track of them. They'll tell you when they're overdue as well.

PATRICK

16:51 Gotcha.

QUINTON

16:52 You'll have all your job history here of what happened in the past. You can keep track of all the assets or location. So each of these assets are, is a piece of equipment that you would service. They can have their own location, pay or me on their own link. So I can click into this kitchen master built refrigeration unit. And I get all the information for make mile, serial number, attachments, past work order history. Really, it's nice for the technician because rather than having to go through a bunch of past work orders to find this piece of equipment, they can click directly into that unit and see all the history for that unit.

PATRICK

17:29 Gotcha.

QUINTON

17:34 You'll see any deficiencies that have been found in the past. So, things that have been broken and have been fixed or still need to be fixed, any quotes that you've sent

out... gotcha. Pricing contracts for mark up rules... comments could be an alarm code to get into the building every time you go out there or, hey, we always need that tall ladder. And then attachments can really be anything that you'd find valuable for this customer could be a mapping or manual and how to operate on a piece of equipment. That storage is completely unlimited.

PATRICK

18:10 Gotcha.

QUINTON

18:15 Moving on real quick. I made this a mock job today. This is what a work order looks like. From the office view. It's got your appointment details as far as the technician, the service that he's performing today. We've got the parts labor and items that the technician is gonna need for the job and then also their clock events. So we keep track of time and service trade in three primary ways versus going to be in route. So their travel time we have onsite and then job preparation. If that's something you guys want to track everything's based on the clock event itself. So when they do clock into a job, we're taking a GPS snapshot their location, and that's how you can kinda keep up with where your tech are throughout the day.

PATRICK

18:57 OSHA, do they have to manually check in or is it like the GPS tracing thing?

QUINTON

19:02 So it's not gonna automatically clock them in. They do have to select that button, but once they clock into the job, they can't clock into the next job without clocking out of that previous job.

PATRICK

19:12 Gotcha. That was a big problem with Gill, canvas our guys, you know, nightmare.

QUINTON

19:19 I was a technician out in the field before I got into sales. So, I get it.

PATRICK

19:23 Yeah. And. I did it too. You know, I felt I just, you forget to do it sometimes, you know, so.

QUINTON

19:28 Exactly.

PATRICK

19:28 Yeah.

QUINTON

19:30 Especially when you got jobs on jobs stacked on each other?

PATRICK

19:33 Yeah, yeah.

QUINTON

19:36 All right. What the mobile app looks like for the text? I've got it filtered on by what's due today. But if I want to uncheck that box, we can see a list of jobs that we have scheduled for the week. Anything that's unscheduled that we might want to be able to knock out. So maybe there's a list of repairs that's like, hey, we're not really sure what time that we can get out there. But if you guys have time, go ahead and knock those out, you sort those jobs here by what's closest to them. So if they get finished with a job, hey, I just wanna see the closest job I can knock out or what's top priority or things that are due soon. It's an easy way for them to see those jobs. They can also view them on the map as well.

PATRICK

20:20 Awesome.

QUINTON

20:22 I'm gonna click into the job that we have scheduled for today. We have our clock events down here at the bottom. So, I'm gonna say that we're on the way to this job site. So, I'm clocking in, we're heading there and I can notify the customer that we're on the way. Just a friendly heads up. Hey, Patrick, we're gonna be there at 10 50. Once we arrive to that site, I'll clock out on.

PATRICK

20:50 What is that notification? A customer gets like a text message or what is that?

QUINTON

20:54 They get an email notification with the technicians picture. It's gonna have their eta and then a quick description of what they're going there to perform.

PATRICK

21:02 Gotcha. Okay. Cool.

QUINTON

21:07 Now, I'm clocked in on site saying that we're there.

PATRICK

21:10 Quick question about that. Sorry. So, do you guys, so it sounds like you guys had your text do that? Do you ever have the, is there an option to have the dispatch person in that notification?

QUINTON

21:20 They can. Yeah. So there's appointment reminders or like notifications. You can send a customer whether it's like, hey, you know, we're going to be out there at this time today or you have a service coming up next week, you know, what's the best time for us to get out there?

PATRICK

21:34 So, yeah, I guess for us as of now and for the future, since it's all kind of reactive, it seems like it make more sense to have the text and the notification, you know, otherwise, just one more person getting in the way, you know, somebody in the office getting involved doesn't need to.

*--- Small Talk ---*

QUINTON

21:51 Right. And the idea behind it, and I'm sure, you know, this is for being a technician, the office can say, hey, the text can be out there around this time, but who knows what's going on in that previous job?

PATRICK

22:00 Yeah.

QUINTON

22:01 Hit traffic out for lunch. So it's a good way for the tech being like, okay, I know I'm gonna be there around this time. They can send that out when, you know, when they feel like they're actually gonna be.

*--- Small Talk ends ---*

PATRICK

22:10 Yeah. Okay. Cool.

QUINTON

22:14 So they're presenting with eight tiles of information about the site. Basically everything we just went over on that location page. The first just being what's the service that we're there to perform. It's. Got the unit that we're working on a quick description of that call. We have our comments here that was left in the office. So there is that alarm code, but this is where the technician type their notes in about the job or they can maybe update some information about the location, maybe the alarm code changed.

PATRICK

22:44 Okay. So.

QUINTON

22:46 Their attachments here is where they can take photos, they can scan in documents, take videos, record an audio message.

QUINTON

22:57 There's the contacts that we have at the site... and then our job items here. So everything that we've already put on the work order ahead of time. The technician can also add parts themselves from the field. So if there's something they want to choose from their parts list or add up a part that's not yet in your guys item list, they can do so and add that to the work order. OSHA... we have the asset here. This is how the technician can just say, okay, I'm walking up to this rooftop unit. I have no idea what's happened on this unit in the past. They can click directly into the asset and view all the service history.

PATRICK

23:36 Cool.

QUINTON

23:39 They can view the things that have been broken on it in the past... and then any attachments, comments and all the detail about that unit.

PATRICK

23:50 Awesome.

QUINTON

23:54 But let's say that a technician did notice a repair that, you know, maybe they can't fix on site today, and you guys need to get a quote to that customer. I'm gonna click onto that deficiencies tile here and say that we found a broken compressor. Now, the technicians can describe these repairs in multiple ways so they can take a picture of how bad that unit is, maybe take a video of what it's sounding like or even record an audio message for the office, to hear back in the back in the office. So I'm gonna take a photo here of this broken compressor.

QUINTON

24:37 I'm also going to record an audio message. So I'll say something along the lines of, hey, I'm out here at this long horn stake house. We have this broken compressor here's. The parts that we need. This amount of time it's gonna take to fix it. We need to get a quote to this customer as soon as possible. Once we hit save, you know, walk the tech through a few quick steps. The first just being how bad is this problem? The severity we pronounce say it's notable, but they can also just say, hey, it has some defects. It's still operational, but you might want to fix it or just suggesting some minor issues to the customer that might be an issue in the future. We're gonna tie it to that rooftop unit that were working on and then select the status of saying, hey, we just found this is brand new. Once we hit save that's, all the technician, has to do so they can start wrapping up their job all while the office is getting notified by email of that deficiency being found. So the idea behind it is as soon as the technician is finding these repairs, the office can quickly get on, you know, developing that quote, getting it out to the customer and getting it approved.

QUINTON

25:45 Just curious though. Do you see any benefits, you know, around that process of like making it easy for the technician to record that? And?

PATRICK

25:53 Yeah, it's my understanding. Right now. There's none of that going on. I don't think there's any upselling or any like it's all just the people that are calling us, you know, just don't even care about the price. They're just getting it prepared and then that it as long as it's functioning. But so, yeah, there's definitely an opportunity to like have this information, you know, and be able to follow up with the customer. I don't think we would, I don't see it necessarily being like a... like need to get them a quote while the guy is still there like, you know, an urgent thing but definitely like the next day or something following up and say, hey, our guy found this like maybe it's something you guys consider. I mean, that would definitely be a benefit obviously to that.

QUINTON

26:31 Yeah, yeah, for sure. And, you know, to your point too, I just, maybe it's not as soon as possible that you're getting this quote out. But at the end of the day, if it's a note that the technician forgot to write down or, you know, maybe, they wrote it down the work order, but the office missed it. It's an easy way to track these repairs, and have visibility in the office. That way you're not missing out on those opportunities.

PATRICK

26:52 Yeah, it's great. I gotta be honest. I also see this as like a thing that the tech could just is gonna skip through, you know, I'm sure a lot of them do and, you know, if you got other jobs to go to, it's like, if that's like a tech savvy or just, you know, get comfortable with the app. So it just takes time I think to get them trained, you know, and tell, you know, obviously... get them used to it. You know, you have to incentivize that. Somehow. I think that's a lot of like extra steps that... aren't necessarily why they're there, you know, in our case...

QUINTON

27:24 For sure. And it's to your point, it's more. It's more geared for that recurring maintenance. I.

PATRICK

27:30 Yeah, I see it that's like makes complete sense. Yeah. As we start to do that more and more.

QUINTON

27:36 Right. Exactly. Yeah. And, you know, making a quote from this and we won't take too much time, but just...

PATRICK

27:46 I...



QUINTON

27:46 Give what it looks like. All the repairs technicians do find, you can attach them to these quotes and create quote templates for instance. Like I have a compressor replacement template in here. It will generate a quote description along with those parts labor items that are typical for that type of repair. And then you can share this with the customer along with those attachments. So there's that picture that we took along with the audio message, we can decide what we want the customer to or not to see. And then when you send it that's when they have... that approved button where they can view all that detailed information about that repair. So your branding description there's the photo, they can click into. And now all they have to do is click approve or they can request a change.

PATRICK

28:42 Gotcha.

QUINTON

28:46 But to wrap up this work order in the field, are your technicians getting like signatures for?

PATRICK

28:52 Yeah, right now, they're not receiving taking payment in the field. They're just getting a signature and getting the customer care copy receipt with no pricing on it. And then basically the office calls in by the end of the week and gives them an invoice. Or, you know, mails an invoice.

QUINTON

29:08 And you wanna continue having the office provide the invoice to a customer?

PATRICK

29:12 Now that's kinda big question right now. I mean, no, I think, I guess it just depends on the situation, you know... and I know different companies do differently. I mean, I think, it comes down to how like user friendly, the app is because, yeah, I would like the tax to receive, you know, invoice and receive payment in the field but... or at least invoice, but it's like the question is, I don't want them to be, you know, all caught up on... the actual creating the invoice, you know, but it seems like it's pretty so far. They've all been pretty user friendly. So... would you say most of your guys customers have the tax just in providing an invoice?

QUINTON

29:57 Typically, no, actually.

PATRICK

29:59 Okay.

QUINTON

30:00 Like a lot of the commercial contractors that, you know, I hear at least that our customers deal with. Usually, the person that pays the invoice is not the person that's on site. So they're collecting a signature saying, hey, this is all the great work that we perform for you today. Here's. The parts that we use, and then whoever is on site can sign off on that work, but...

PATRICK

30:20 Yeah.

QUINTON

30:20 They can provide that invoice from the office side, you know, once you've had a chance to review that work order, make sure it looks good as far as parts on pricing, you know, let your technicians do what they're good at, which is the actual work and then let the office do what, you know.

PATRICK

30:36 Yeah, it's funny. You said because that's all that's my head was that, but the last two demos I've talked, you said the opposite, you know, they're kinda like pushing the whole with your text, you know, if they're the ones that know how to do it and they're you know, it's just want, you know, eliminating an extra step by not having the office look at the invoice and it's like, well, all of a sudden, you're asking the tech to be the bad guy giving them an invoice, you know, and getting the push back, all the bullshit, it's like that's. I think you said you were tech prior to this, right? So, you kinda know what I'm talking about. It's like it's not those guys jobs. And, you know, we want them to make them. I don't want them to spend a lot of time or, you know, brainpower trying to talk with invoicing and, you know, negotiating with the customer and stuff. So.

QUINTON

31:16 Exactly. The.

PATRICK

31:17 The preference thing I guess, but I'm with, you know, I'm kind of, I think that's you know, the just invoicing once they have the invoice pricing it out, it shouldn't be that hard for an office person. I wouldn't think and it's like you wanna make sure it's right, right? Like a second set of eyes on it, but you don't wanna do is send out the invoice, it's incorrect and then have to go back and charge more, right?

QUINTON

31:38 That's and that's really the nail on the head. You wanna prevent the amount of like mistakes or things that might be missing, wanna work were, you know, text aren't perfect out in the field. I know I forgot a lot of parts and stuff, you know, that I use or maybe I didn't use and it's just an easy way for things to get missed or mistakes being made. And then that's you know, time spent going back, and disputing that with the customers. So.

PATRICK

32:02 Catch it, you know, it's like then you gotta hope you catch it.

QUINTON

32:05 Right. And I'm not surprised that the, you know, service site and BuildOps suggested that workflow those, the software companies are great, but they're more geared for the residential side of things. So, you know, it makes sense that, they would suggest that type of.

PATRICK

32:22 Actually mention, my background is in restaurants prior to, my last business. So, the same thing that's where a lot of our clients are, you know, convenience stores, restaurants, stuff like that. When you hire somebody to come out and do it, you don't give a shit about the price at that point, you kinda know what you're going to get, you know, it's going to be expensive. You just want to get fixed, you know. So, and once somebody's there, you don't get a bid, you know, it's like you just have to get the work done. So that's why it seems crazy now to think about like getting an invoice to a customer without any pricing on it. When I look back, it's like we do that all the time that's in the restaurants because you just had to get it fixed. So it's a different, yeah, that's why I guess stuff like the whole things like that are I think we commercial so much different, the residential, I guess. So... that's a good point. Yeah, some of those guys just focused on residential.

QUINTON

33:11 They try to, they try to get both sides done. And unfortunately, when you try to fit the residential and commercial workflow, you typically don't do either of them that great. So we try to just focus solely on commercial and being the best at that. Gotcha. So, but for this work acknowledgement, your technician can get a signature before they start the work of like, hey, this is what we're here to do or they can get it after I'm gonna do a post work acknowledgement. I'm selecting the customer that's on site here.

PATRICK

33:43 Okay. What are most of your customers? Do you think pre work or post work?

QUINTON

33:48 So, for pre work, it's more designed for like an install. It's basically saying these are all the parts and things that we're going to be installing around, you know, the building. Is this all check out? This this all makes sense? Okay. We're good to go before we actually install that equipment. The, the post work authorization of is more along the lines of like if you're doing a repair or if you're doing, you know, a maintenance or some type of service that's gonna just need to check off like, yeah, this all looks good before we leave that way, you're not getting a call back from the customer, like you guys forgot to do XY and Z, but.

PATRICK

34:20 Yeah.

QUINTON

34:21 Got a signature from your site saying that this was all.

PATRICK

34:24 So, do you think you have guys that I compare to repair? Like what we do? But mostly, do you think it's they have like, a signature for authorization to do repairs and then another signature post work or is it just one typically?

QUINTON

34:39 To me that seems like a lot of back and forth with that customer on site but it's really every customer is different, right? You know, you're going to have some customers that are like just go out there and do it and, I just wanna make sure it gets done and I can sign off after, but you might have those other customers that are really picky about what gets done there and they wanna, you know, kind of have their thumb or, you know, be involved in each step of the process. So it's designed, to match either workflow.

PATRICK

35:06 So, yeah. In, that, the latter case, you mentioned with a picky customer, obviously, that means that the tech has access to the actual pricing whenever they're creating an invoice or whatever they're creating the work order or whatever you call it the.

QUINTON

35:21 That's up to you. There's a, the service trades fully permission based. So you can make profiles for your text and your office staff or, you know, things you want them to have access to or not have access. Pricing is a big one that our customers are typically turning off the technicians. They want them to be able to select what parts that they use, share that with the customer, but they don't want them to see those, that type of pricing.

PATRICK

35:45 Yeah.

QUINTON

35:45 And then there's also technicians that you might have, you know, a lead technician or, the senior tech that does more of the pricing out in the field or purchasing of parts and you wanna give them access to that. It's up to you guys.

PATRICK

35:58 Yeah. Okay. So I think when, like for example, the customers pick you exactly what's going on. You think the text will do that without providing them any like call the cost of what they're doing. They just gonna tell them exactly what's can itemize, what the, what parts they're using and then tell them like, you know, you'll get an invoice from the office or call the office. If you have a question.

QUINTON

36:20 Yeah. I mean, they could do that or they can share that pricing with them. If, you know, if you have a customer that is super picky once to see pricing before you leave and they sign off on it, you know, maybe that's a technician that you give a little bit more responsibility to and they can share that information with the customer before.

PATRICK

36:37 Can you turn it on and off?

QUINTON

36:39 Yes.

PATRICK

36:40 By job? Yeah. So live, so, okay. That's good to know.

QUINTON

36:44 You can turn it on and off per technician at any time.

PATRICK

36:48 Interesting. Okay. Can you show me to do that? I'm just curious how?

QUINTON

36:52 Yeah, sure.

PATRICK

36:52 I...

QUINTON

36:55 So, but for the work authorization, we're going to get sign off here, basically showing the services that we completed here's, where you can toggle on and off the part. So, like we actually didn't use, you know, those belts down there at the bottom or the filters, but we need to add more parts... there's that repair that we found.

PATRICK

37:19 Okay. Yeah.

QUINTON

37:21 Once we get a see review, the customer confirms your disclaimers and warranties and they just sign directly on the device?

PATRICK

37:31 Awesome.

QUINTON

37:35 Last step for the tech is just to clock out their clock out button down here at the bottom. It's gonna say, hey, did you complete your services today? This is great for return visits. So, for some reason, they didn't complete the service. They can leave it unchecked but complete the work order. And then back in the office, you can see that, hey, we have to go back out there for a return visit. I'm gonna check off that we did... and finish clocking out. That work order gets updated in real time. So we can see now that service has been changed to completed... here, are the clock events as far as how long we were traveling, how long we were working on site, our total time, and where we were when we clocked in and clocked out of our jobs. And then this is the attachment of the signature that we got from that customer.

PATRICK

38:44 Sorry, this is what the invoice, this is what the customer is getting.

QUINTON

38:47 This is sorry. My internet was being a little flaky. This is that work acknowledgement that signature that we just got signed off on?

PATRICK

38:53 Gotcha. And that could send to the customer.

QUINTON

38:56 Yep. So they got a copy on site already. This is just the office is copy that was attached to the work for review.

PATRICK

39:04 What do you mean they got a copy on site? You mean they saw it on site on the tablet?

QUINTON

39:07 So, when they signed off, on that tablet, they get an emailed copy of that work acknowledgement.

PATRICK

39:14 Gotcha.

QUINTON

39:15 But, the actual work order that the technician completed here, it's attached also to the work order for you guys in the office to see. Yep quite got that signature from the customer on site is.

PATRICK

39:26 Okay. Yeah.

QUINTON

39:30 When it's ready to be invoiced out, we'll just complete the job, complete the job and create the invoice. They'll give you a section here to adjust the cost or the parts as needed.

--- Pricing ---

QUINTON

39:50 And then on the invoice itself is where you can adjust the price that you're actually charging the customer, add some pricing here. So we didn't have any over here.

QUINTON

40:07 It's gonna give you your gross margin down at the bottom.

QUINTON

40:15 And then you can send out your invoice. We call it an invoice link. It'll have a pay now button directly on the invoice, so they can click into pay. Now, they can pay with a credit card or pay with an AC H. There's also a go to services details section. This is great for those customers that are on site and not quite sure exactly why they need to pay for this repair.

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QUINTON

40:40 Maybe he didn't even notify the owner that this is getting done. The owner can click directly into that services link and they get a full job summary of the technician that was out there, the appointment that was completed, services that were done... any parts that were used. And here's that signature that they got from their manager on site?

PATRICK

41:01 Awesome.

QUINTON

41:06 So, any questions about any of the invoicing or the work order back in the office.

PATRICK

41:11 No, I think so. Pretty good.

QUINTON

41:16 Yeah. So as far as, the profile that you mentioned, let's go through that real quick. So as an admin, you'll be able to go into your account and you can view all of your users. So I can come in here, search for a technician, click on their account here.

PATRICK

41:39 On...

QUINTON

41:40 And off their roles. So right now, I've got all, the main roles that I need. But one of these right here is the account technician for enabling invoice. If I want to remove, that, I just click on remove and it takes that permission away from the technician. These are all the different roles that you can choose from, and you can set up your own roles. So you can make like new hire roles where you only give them, you know, certain permissions that are, very, limited out in the field. Really the sky's limit here, for the roles that you can choose from.

PATRICK

42:10 Okay. Awesome. Well, I think I forgot to ask the other guys too. Can you, can you, is I'm sure it was just something like end of day or end of week report you can do that shows, you know, total tickets like total revenue?

QUINTON

42:24 Yeah, yeah. So.

PATRICK

42:24 Per employee or stuff like that?

QUINTON

42:27 All of your reports are going to be up here at the top. So you can run reports on the jobs that have been completed or return visits or parts ordered, quotes that have been sent out that haven't been approved to see revenue, things that haven't been paid. So on. And so forth. Jobs reports are great. You can run a report that's basically saying like, hey, I wanna see all the jobs that we did last week that have incomplete services, parts that, you know, have been ordered or parts that have ordered and not yet received. Easy way to keep track of things from a job standpoint along with your appointments invoices, same thing. You'll be able to see all the invoices from their statuses of paid. Run a report of all the revenue we brought in from that week... or things that have been unpaid. And then same thing with the quotes, we can see quotes that have been outstanding and still need to be approved. Bulk, send those back out to the customers. They're all on the top of their inboxes. So like I could say, hey, I wanna see all the quotes that have been submitted and viewed by the customer, but haven't been approved or ones that have been submitted and not even opened up in their inbox, yet? All this information can be bulk sent back out to the customer like a nice, you know, message saying notice. We did, you didn't approve that quote. Is there any questions that you might have?

PATRICK

43:55 Gotcha. So I, can these all be automated? Can you do a report that sent like, a jobs for example, in today? Can I have an automated report that shows the jobs that were completed for the day?



QUINTON

44:06 There's no report that's automatically going to be written, but on your dispatch or on your dashboard that's kind of what your real time, what's happening today section is gonna be, and that's going to be right here in the jobs past jobs would be marked complete. So, this is saying like, hey, these are the jobs today that your technicians have completed. Let's review these jobs and make sure that everything on that job looks good before we invoice those jobs to the customer.

PATRICK

44:33 Gotcha. So, I guess on the end of the end of the week, though, I could just run a report for completed jobs in a certain date range, right? Monday to Friday.

QUINTON

44:41 That's correct. Yeah.

PATRICK

44:41 Okay. All right. It's pretty straightforward. Can you, can you show me the report? Can we do one like a sample one?

QUINTON

44:51 Sure.

PATRICK

44:53 I'm sure. It can be as like, you know, as brief or, as have as much information as you want, right? I would think at the end of the week you want like jobs completed in total, you know, sales revenue per job, what tech and what job?

QUINTON

45:09 Yeah. I've got this all the way back to.

PATRICK

45:11 Per tech, maybe that would probably make more sense.

QUINTON

45:15 If I wanna see like back in June on the fifth to the ninth, I wanna see jobs that were completed... I hit search. It pulls up all the jobs here so I can click into each one, review them as needed. I can export these jobs and view like jobs and appointments, their clock events, the items that they put on those work orders, getting really the sky's limit as far as the reporting you can run of job statuses.

PATRICK

45:47 Show, the revenue per job anywhere.

QUINTON

45:50 That would be on the invoices side. So, these would be the job.

PATRICK

45:55 Okay. Yeah.

QUINTON

45:57 For a particular week and you can see the invoice totals and invoice details.

PATRICK

46:01 You export the report?

QUINTON

46:03 Can, yup.

PATRICK

46:07 So...

QUINTON

46:08 That's right?

PATRICK

46:09 Cool. That's that probably makes, see, yeah, I guess you buy tech by tech and we can show the revenue amount. Yeah. Okay. Cool.

QUINTON

46:18 And you're really looking to see like tech revenue per tech. We have the technician scorecard, which is kinda cool. It's a great way to like incentivize technicians.

PATRICK

46:31 Yeah, that's not thinking kind of it'd be nice to kinda let them know what they're doing, you know?

QUINTON

46:36 Yeah. So like each tech again has their own Lane, you'll be able to see all of their clock events. So like who was traveling the longest, who was actually working on site, the longest, preparing for jobs for a particular date range? And then on their appointments, we can see who completed the most jobs, who was late to the most jobs, and then who just missed the most because maybe they were still stuck on site. You know, I definitely know being a technician, you know, some technicians take longer than others and miss jobs throughout the day that they may be able to get to season. And it's...

PATRICK

47:06 Thinking cause you probably don't want if you're not if most of the tech don't see the actual cost of the parts and labor and stuff, you probably don't want to show them the total dollar, but maybe just you think it's most common to do number of jobs. It's kinda like a benchmark.

QUINTON

47:23 Yeah. Exactly. I mean, it's you know, if you have a tech that's consistently missing appointments, there's probably a reason for that. Yeah, that's your queue to then do more digging on the report side on the job section to see, okay, well, how long is he actually spinning out these jobs? And what's the reason for that? So that's a great opportunity to sit down with a technician and kind of figure out, hey, what, what's the reason why these are taking so long?

PATRICK

47:48 Yeah. All right. Cool. Yeah, that's pretty helpful. It's one of those things. Again, it's like there's obviously so much information. It's it's really about customizing it. And obviously at the orientation is right? Just making it because I think even going into this before we implement it, I would kinda know like what we want to track, what information we need to see and what we don't you know, because it can be a lot, you know, to train a dispatcher. I think on some of this stuff.

QUINTON

48:18 Yeah. And you know, once we get closer down the line, of what you guys are looking to make a decision, we can stay in touch and really go through what that process is gonna look like. We, we operate on implementation start dates. These start dates happen on the first and the fifteenth of every month. And it's typically a three month process to get completely live. So first step is just securing your start date. And then from there, I'll introduce you to your project manager who will have a kickoff call with you basically lining out what to expect from the implementation. How we're gonna get your data in the.

PATRICK

48:54 Service?

QUINTON

48:55 Trade any asking questions, just kind of preparing you for that start date. And then once you guys go start your implementation, we're importing all that data in the back end while we're also, you guys are training. So you'll go through an online certification program for your technicians to get trained. Also give you account as well. You'll be able to use service, trade, play with it, get accustomed to it. And once you guys are ready to go live and everything looks good from a data standpoint, we'll switch that test account to a live account. And you guys, are hitting the ground running from there.

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PATRICK

49:29 Cool. Three months. Okay. So that's about average. You think that's basically like what the you guys in three months after we start you, you're live?

QUINTON

49:40 Yeah. So we have, you know, there's every implementation is a little bit different. We give three months based on your company size. So company size usually takes about 60 to 90 days. I would say, you know, it depends on how quick you work with your project manager. If you're really on top of getting data over to them, it's in a clean format and it's easily to be imported. You guys get trained quickly. We've had customers get up and running in two weeks, but really dependent on the complexity of what we need to get into service trade and how easy it is to get you guys up and running from a training standpoint.

PATRICK

50:18 Yeah. And that's what I'm more aggressive on the estimate because I think we're going to have both companies will have, the owners and their admin help with the transition for probably up to three months. Hopefully. So with that, the plan is to really take advantage of them and, you know, have either myself or somebody else be dedicating a lot of time to getting everything the ball rolling, you know, getting things going.

QUINTON

50:42 Yeah.

PATRICK

50:43 Just the software.

QUINTON

50:45 Sure. And just curious how many technicians are between the two companies?

PATRICK

50:50 It'll be 10, 10 to 11. And I mean right now there's it'll be three admin total, probably less, you know.

QUINTON

50:57 And is your goal is your goal to have both companies on the same platform or have them? Opt?

PATRICK

51:05 No, they'll be on the same platform. Yeah, they're essentially, the service offerings are very similar, you know? So it should be pretty easy... combination. What's like ongoing support like?

QUINTON

51:20 Yeah. So let me just pull up our pricing page real quick. It's a little bit easier to walkthrough so I'm glad you mentioned that you would want them on the same platform on our enterprise package. Well, actually. So, for the two companies, are they going to be, are they going to have different brands or is it all?

PATRICK

51:38 No, they're going to have the same brand. They're yeah, to the same company.

QUINTON

51:41 Okay. Got it.

QUINTON

51:47 So we have select premium and enterprise usually companies between 10 to 20 technicians. When we utilize our premium package. What that's gonna get you is the customer portal, but also the 24 seven emergency support. So basically any time of the day, your technicians can call in office staff can call in and get some, but you'll also have ongoing support with your account manager as well. Once you guys go live, your project manage, pass you off to your account manager. And that's kind of your first line of defense. If anything goes wrong from a technical standpoint, or like, hey, we have questions about pricing and things like that that's your go to. But yeah. So there's the enterprise and, or give me the premium. And then there's also enterprise. I don't think that you guys would need enterprise now since you're not going to have multiple brands. If you have multiple brands, this would be a great way for you guys to keep those companies separate on the same account, but you guys can do that 100 percent with the premium side of having different offices and keep that on one point.

PATRICK

52:49 Gotcha. Okay. Cool. And, is there like, a fee like an implementation for your name?

QUINTON

52:58 Yeah. So fee for 10 technician is about 3,500 dollar setup cost. And then it's just per technician per month billed annually. So it'd be like one 39 times 10 times 12 would be your... subscription?

PATRICK

53:15 Gotcha. All right. Cool. Well, the pricing wise you guys are seeing like you're white reading between the other ones, you know? So...

QUINTON

53:28 We're we're not more expensive than service tighten. Yeah, we're usually service tighten is a little bit more expensive than we are. BuildOps is usually kind of about the same typically. But yeah, we're...

PATRICK

53:45 Awesome. Cool. Well, that's all I, that's all I really have right now. You know, I would say like, I think, I hope at the end of this week, I think I might have making every day we're making Progress in these two deals, you know? So it's hard to say like a definite time and we'll have a signed contract but I will definitely know more in the next one or two weeks, you know, in terms of timeline for being ready to pull the trigger, you know?

QUINTON

54:10 Yeah, for sure. And what I'll do is I'll send over just to recap today with some resources about onboarding, I'll send over some pricing information and the recording from today's, demo, hang on too, if you want to review it with anybody.

PATRICK

54:25 Great.

QUINTON

54:26 As far as next steps, would it make sense just to reconnect in two weeks? See where you're at with that?

PATRICK

54:32 Yeah, I'll definitely know more in two weeks. You know, I don't know what I'll know, but they'll definitely be a better idea of target date. So, yeah, it sounds good.

QUINTON

54:42 Okay. Just so I can put it on my calendar any particular day, the week of the tenth that would work.

PATRICK

54:52 Let's today, the 20 ninth. Let's see. I actually leave town two weeks from today, but maybe like the twelfth or Wednesday before?

QUINTON

55:03 Sure.

PATRICK

55:04 Morning and I have something at 10 a. M, but nine a M or anytime after 11.

QUINTON

55:12 What time zone are you in?

PATRICK

55:13 Central...

QUINTON

55:14 Okay. Yeah. Nine am would work for me. I'll just there's a quick.

--- *Wrap-up* ---

PATRICK

55:20 Yeah. Let's go off the call should work.

QUINTON

55:23 Okay, perfect. And is there a direct line I can reach out?

PATRICK

55:26 Yeah. My office here is three one, four, two, seven, nine, one, six, four two.

QUINTON

55:37 Perfect. Well, Pat, I appreciate your time today. Did you have any other questions?

PATRICK

55:42 Yeah, no, that's about it. Really. I appreciate it. It comes up or any questions I'll let you guys know, but all of that, I think we got it.

QUINTON

55:51 Awesome. Well, hey, have a great fourth of July weekend and we'll be in touch soon.

PATRICK

55:55 Thank you. You too. Take care.

QUINTON

55:57 Bye.

*The End*