ServiceTrade Demo with Pueblo Mechanical & Controls Inc

Maribeth Steffen with Alliance Solutions Group, LLC and Pueblo Mechanical &
Controls Inc
Recorded on 2/17/22 via Zoom, 1 hour 36 min.

Participants

SERVICETRADE

Maribeth Steffen
Field Manager

Tim Spink
VP of Outside Sales

PUEBLO MECHANICAL & CONTROLS INC

William Markley
CFO

Scott Meeker
President

OTHER

Andy Rashid

Topics

Transcript

MARIBETH

0:00 That's weird. I think we need to have another meeting.

TIM

0:05 Yeah, 11 30.

MARIBETH

0:06 Yeah, alright.

TIM

0:08 Yeah.

MARIBETH

0:10 I can get out of this.

TIM

0:13 Yeah. Can we get our, no.

SCOTT

0:15 Response...

SCOTT

2:02 Hi, Bill.

WILLIAM

2:05 More internally. Yeah.

MARIBETH

2:06 No worries. I'm Mary Beth, it's nice to meet you.

SCOTT

2:09 Hello?

WILLIAM

2:10 Scott is not on yet.

MARIBETH

2:12 He's not so, but.

WILLIAM

2:13 It now, okay. I'm sure it'll be momentarily here.

MARIBETH

2:18 Okay. I appreciate you taking time to meet with us today. Yeah.

WILLIAM

2:23 Really, we'll wait for Scott, but I'm the CFO, he's a C and really, and is this is really his world more than mine? So I'll be providing moral support maybe a question here and there, but it's he's... he's really the guy and he's got a lot of an industry experience. I'm sure he's gonna ask you some... some good questions. So.

MARIBETH

2:46 I'm... I'm ready for.

WILLIAM

2:48 Alright, the tests he's gonna test. Yeah. So just big picture. We're in the midst... of... of evaluating different ERP is where we, we've grown where we've been and arrows on the business... historically. And now we've expanded in Texas, Utah, and we're going to keep on going. So... we're... we're... we're... we're... we're at the point where we really need to... most likely move to a different ERP partner.

--- Accounting integrations ---

WILLIAM

3:15 We have coins currently do INS in Arizona, but we've got Sage 300. We've got other legacy systems out there. We gotta move to one platform. So, we've been in conversations with Sage intacct. And of course, Andy is, you know, pretty enthusiastic guy and he's like, you know, we have service modules within intact, but you guys really, you know, I appreciate it.

--- Accounting integrations ends ---

WILLIAM

3:38 He, he's like you really should be thinking about a couple of these other partners to, because they're... they're darn good. So, so that's how we got to where we are this morning.

MARIBETH

3:47 Yeah, I...

SCOTT

3:48 Saw...

MARIBETH

3:48 On your website, but it seems like you guys are in a pretty big acquisition phase at this point? I did see that last year, there was a couple of companies in Texas right now acquired.

WILLIAM

3:58 So, we're... we're private equity owned. So I don't know, are you familiar with private equity... private equity always comes in and that's what they do. They just, they... they bring the capital to the table and financing and that's what they want you to do. So, we've done 10 acquisitions, most of them and six or seven of them. I'm trying to think now favorite probably seven in Arizona, three outside of Arizona. Most of the future acquisitions will also be outside of Arizona, Colorado, Mexico more in taxes. You know, we can go to Florida. We would. So that is... that is the strategy. Well, let Scott get into it. I don't think he's thinking one big database. These are all local businesses. So if we pick a service partner, we'd want the ability to, we certainly want standardization and commonality across them, but we're going to want to each business to run their own. I, Scott, I'm just giving them a little background on Pueblo way we are waiting for you.

MARIBETH

4:53 Hi, Scott. Nice to meet you, I'm Mary Beth, and we also have our VP of sales, Tim sync on the call as well.

TIM

5:00 Okay. I'm... I'm a former Arizona and I guess I used to live out and I will take you out in the foothills.

WILLIAM

5:07 Yeah, I...

SCOTT

5:08 Do not. I live in Arizona. Doesn't really resonate with me as much but.

WILLIAM

5:14 And I... I live in Michigan. Scott and I both commute Arizona as needed, but...

TIM

5:19 That's the best light have her.

SCOTT

5:23 Or in the winter time in the summer time, but.

WILLIAM

5:27 Yeah.

TIM

5:28 Black, when I lived there, half of the people that were there, I mean, you're right? The reason for originally from Michigan, Nebraska. It was a big, it was a big transplant out. Yeah, interesting who's your private equity partner?

WILLIAM

5:41 You're on capitol?

TIM

5:42 That's right? Alright. Yeah. Yeah. Yeah, we're... we're we have private equity. We're Jeremy, that's our big backer, so.

WILLIAM

5:52 You go. So, yeah, you know, and that's the game or, and so, you know, we... we, you know, we're... we're buying these companies because we see value in them in there. I mean, we're not buying turnarounds, we're buying established, you know, well, Ron companies, but, you know, we're... we're trying to bring them under the Pueblo umbrella, but we're... we're... we're not trying to be ogre, we're not trying to be heavy handed, tell them how to do things, but we do want to bring technology and the table and start to drive some common practices. And obviously, that's why we're on count on the phone with you guys today.

TIM

6:23 We're seeing a ton of that. I mean, we see it on the fire life, safety space, mechanical tons of private equity money even on our side on the technology side. So.

WILLIAM

6:34 Yeah.

TIM

6:34 It's a meeting times and you're right? It's... it's we'd probably, I don't know maybe once a week, probably having these conversations.

MARIBETH

6:41 Yeah. Yeah. I would say, I would say that's... that's spot on.

TIM

6:46 Yeah.

WILLIAM

6:47 And Scott can give you a bigger picture on, you know, like his vision, you know, per service and again install disjointed today.

MARIBETH

6:55 Yeah. And... and Andy was kind enough to... to kind of share some... some of the immediate needs that you guys have, but I'd love if you wanted to elaborate on that or if there's any key priorities that you're trying to establish as you guys continue to grow? Yeah.

SCOTT

7:14 I mean, at a macro level, I mean, we... we have, we've started Arizona, so we are... we are, we can then expand that to Texas to Utah amount. And so, you know, we've Arizona, our legacy business. We have decided. So we've we went out in this, you know, really look for best in class solutions, right? So we're in the we're in the middle of transforming the organization with products like pro core for our project management software. We're going to Salesforce for CRM. We... we got here today because we've now we've is we bought companies. We're having an ERP discussion which leads to the conversation around, okay, if I'm doing all these things for parts of the business, I can't forget about service.

--- Customer engagement ---

SCOTT

7:58 It's 30 percent of our... our revenue and it's you know, quite frankly the highest margin revenue we have... in the business... or margin in the business. So.

TIM

8:11 We...

SCOTT

8:11 Are... as we talk through it and let's say, and having a few guys and we are... we are looking for best in class solutions.

--- Customer engagement ends ---

SCOTT

8:19 We're... we're coming up what we're coming out of a... a product that is all inclusive where everything has to be inside the product and we believe that we can be more efficient and have better success, you know, kind of picking and choosing best in class solutions to... to do that. And then ultimate goal. Again, I think the last time I got there, we're... we're not looking for a completely integrated full back office centralized dispatching that's not the model where we... we will continue to be disparate in terms of our operation, but we want common practices I'm in the platform to work off of. So the data is consistent. We... we think about when we think about training and onboarding and certification and tools. We, it's... it's consistent. We can link it up and our HRIS system. We can just do stuff and we get a, because most, I mean, quite frankly most of the country buying have zero technology specifically around service.

SCOTT

9:13 I mean, I, we bought a company the other day that literally is still, you know, handle, you know, doing invoicing by hand and then at the end of the day, end of the month, kind of inputting them their ERP system in terms like so that's the spectrum of, you know, got some guys that are on USA like, you know, for example, Sage man, yes, service manager platform to folks that are really doing it by hand.

SCOTT

9:38 You know, when an excel spreadsheet. So looking for something that's robust enough, you know, everything. We're kind of building it around Arizona because it's the it's sort of the elephant in the room in the other companies or smaller. But we feel like this technology. So all of our, and I've just from your own review man, all of our service guys and... and I'm a 15 year Johnson controls guy. So spend time in that service organization. My VP of service is a 20 year York in Johnson guy. So they, the team has seen, you know, they know, what fortune 100 company platforms look like. So they have high expectations. You know, we have... we have a wish list of my along. Hey, can you do this? Can do that? But so that's kind of how we're just now we're out, you know, interviewing and talking to platforms, it and... and kind of looking for the what's... the, what's the right fit and what's the right... the right product and they don't think it's super important while we talk about having an idea of best in class. Like I don't I, you know, I'm... I'm okay. Bolting something onto a csa GRP, it just needs to be, it needs to be seamless, right? I can't I don't want to do any science projects and try and take a tool that.

MARIBETH

10:48 It...

SCOTT

10:48 Doesn't already compatible. And I already talking to an ERP, like I don't have time for that. So, you know, who's as we think about kind of how the integration, but I, I'm pretty sure you guys are already partner with Sage and... and... and platform that they... they recommended on a number.

SCOTT

11:03 So just, you know, that's another thing. It's my service VP is just like, look, I'm... I'm game for, you know, some bolt on activities. It just, it's gotta work like, you know, it should be, it should be a non event for us like we... we don't need to know how the don't want to deal with, how is it communicating? Just make sure that... that communicates?

MARIBETH

11:21 Yeah, I think... I think that makes sense. You guys are service guys. You're not... you're not science guys or integration specialists. So we do partner with Intacct, and Sage and other ERP is and accounting systems. I guess in terms of your impact evaluation, I mean, where... where do you guys stand with that? Is that pretty much have you decided that's the direction you wanna go or?

--- Accounting integrations ends ---

WILLIAM

11:46 The front runner right now, we're looking at this to be this to Viewpoint and CMiC as well. So interested any thoughts you guys have on, you know, pros and cons of integrating with those tools. So, but I mean in tack feels like it could be the best fit because again, we're dealing with 15,000,000 dollar companies that are unsophisticated, and then Arizona, we're almost 150,000,000 dollar revenue business. And so, you know, we gotta kinda thread the needle on. We... we don't need something that's gonna, we're not going to be able to implement these companies. We don't want to grind, you know, grant them to a halt because we put it in this over... over engineered tool. But on the other hand, it needs to be able to handle our growth in Arizona. So anyway, in text probably the in... the in the lead right now and the pole position again just going back to Arizona about 100 and, you know, just north of 140 and revenue and our... and our services 30,000,000 of that.

--- Pricing ---

WILLIAM

12:36 So, and that is not an end significant number. And... and our strategies we buy these... these out of state companies is to get their service to a similar level if possible, you know, 25 30 percent and... and I don't think any of them are at that point yet.

--- Pricing ends ---

WILLIAM

12:51 So it's part of our value proposition that we're going to help them. And of course, that's where the tool comes into play. So just want to give you that context and then just out of full disclosure which I'm you know, I know we'll get your competitive juices going, Andy, and all fairness is hook this up with BuildOps too. So just so you know, that's what you guys are.

MARIBETH

13:12 I would... I would be extremely surprised if you weren't looking at, I think it's helpful that.

WILLIAM

13:18 Hi, this is the sport, you know?

MARIBETH

13:21 Yeah, though, no, I appreciate that.

WILLIAM

13:23 I'll learn to come out swinging.

MARIBETH

13:28 I guess what... what are your first impressions of... of build that?

SCOTT

13:33 I, it was a, it was a very clean, very well thought out tool. I mean, I, you know, I... I, we have done a demo with them right before you guys just with a scheduled worked out. So, yeah, it was, I mean, they... they have as well. It appeared American in the hour and a half or two hours that I some, and I'm really in full transparency. I'm just more of the gatekeeper. So if you get passed me, you get to go to their guys, have used the tool every day, the... the service team and present to them. So... so just, I'm... I'm I mean, I'm in TUNE what's going on but I am by no means the... the final decision, but I mean, you know, I'm letting the teams, you know, they'll... they'll get a chance to really do it. But no, I thought it was a well thought out had had some really interesting features, very clean, seem like a very user friendly modern tool that... that I didn't have any... any necessarily hang ups with. It... it seemed like.

WILLIAM

14:33 Meet with them a lot or.

MARIBETH

14:37 Here in there. Yeah, I would say here in there.

WILLIAM

14:40 They, they newer, that, is that the idea that?

MARIBETH

14:43 They are, they are newer. I don't know Tim, how long have they been around a couple of years?

TIM

14:51 I... I don't know. We... we really have not seen much of them. And so the past probably six months... first time I saw him going to trade shows was HR, it was first time I've seen them there. So, but yeah, no, it's software as a service. It's a modern technology. So like Mary Beth said, I mean, I'm... I'm glad you guys are sort of making the rounds and same thing with accounting systems. I think, I'm not surprised in text the front runner. I mean, spectrum, we have a lot of customers all spectrum, a couple of lines CMiC, you know, our take is, you know, you're... you're out, you're going down this sort of path to say, I want best of breed because I'm doing this for the long haul. The last thing I wanna do is try to have to rip out one component. Again. I mean, if something's not working, we give them but, you know, not do a big rip and replace. And... and again, I think some of the technology, you...

you know, the other two spectrum and CMiC them, the more data, right? So, and I don't know, I'm not sure with spectrum vista, I know Viewpoint. So they've got two platforms. And again question would be worth the long-term strategy with that because it worst case scenario, you end up on something that's going to be any delay in a couple of years and you gotta reply from a re, you know, move off of that, not have another. But... yeah, yeah, I'm glad to hear the... the strategy of best of breed and we love Salesforce. We love broke what we have an integration with pro core. Yeah, we... we talked to Salesforce because we are not a CRM. So we... we like to strategy, we like... we like customer like you, but... but we're open API. Restful API is very modern technology. Yeah. Okay.

--- *Purchase decision* ---

WILLIAM

16:33 Cool. Well, I know we only have an hour today and scots point, you know, this isn't the final. This is kind of the beginning. Yeah, we just need enough to know that you guys checking off the boxes that we could get the... the guys on the phone and we're not wasting their time.

--- *Type of work* ---

MARIBETH

16:47 Yeah, that makes perfect sense. Yeah, I mean these... these typically, these evaluations typically take more than one meetings. So, yeah, let me just give you a little bit of background about service trade. I know that you have these, you know, provided some information about us but we are built specifically for the commercial service industry.

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

MARIBETH

17:07 We've been around for about 10 years and we work with companies like climb a tag Crawford mechanical. Those are some... some companies in Arizona that we work with. And ultimately, what we wanna do is provide a record of truth for your service information and consolidate all of your service operations into one platform.

--- *Customer engagement* ---

MARIBETH

17:28 So in addition, what we wanna do is help you guys turn your business into a customer service business. So you'll see throughout the demonstration that we have a lot of customer facing components. Can customers have been conditioned by companies like Amazon goober, and domino's pizza with their pizza tracker to engage online? And so we want to give you guys that same ability with your customers. So we have a really nice in route notification that your technician can notify the customer picture of the technician, estimated arrival time, services that they're out there to complete an interactive online quote, with pictures, video, audio memos, clearly giving your customer an idea of any repair opportunities that you've found while on site so that they have a really clear understanding.

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

MARIBETH

18:17 They can also take action online by either approving or requesting changes. We have a really nice post service report called the service link. You can send this independently or along with the invoice. We have a customer service portal. Is that something that would be interesting to you guys?

--- Customer engagement ---

MARIBETH

18:34 I know I've talked with a lot of coins on customers. And one thing that they really want to provide is... is a portal for their customers to be able to access and... and give them that level of convenience and transparency.

SCOTT

18:47 Yeah. You know, I don't know if that's come up.

--- Customer engagement ends ---

SCOTT

18:48 I mean it is probably come up is like, hey, this would be really neat. I, my personal opinion, I... I spend some time with comfort systems and we were trying to go down a path similar this is with some stuff is it is a true value add to a customer. And if you can, if you can really have that portal and have that customer ability, I think it's a... it's a really interesting... you know, just an offering to have I've... I've we've I'm not close enough to figure out the guys in the... the teams are really hearing it that much in the market. But to me, it's... it's definitely if done correctly and with the right type of customers that can break, that would be a value add. Let me this not to get off topic here. But it was a, it's a... topic... topic of contention. The last call we had with us. So we have like we, and this is not a trick question. I'm just... three your input. So about three or four months ago, kind of really a little bit before this process started, we were still in there just contemplating what we're gonna do. I... I kinda got that our teams hooked up with exile XI, in terms of a bolt on kind of application.

--- Implementation and ongoing support ---

SCOTT

20:04 Do some videos, some train the train, your staff having some technical resource capabilities. Do you guys, do you guys talk to them at all? Do anything with those integrations? Any... any connectivity to that? Do you... do you feel like the product, your product does the same thing? They do, kind of what, what's your take?

--- Implementation and ongoing support ends ---

MARIBETH

20:21 Well, you know, it's... it's funny that you mentioned comfort systems. I was actually on site with on the salt lake city branch yesterday, they're using coins and an excel I. And essentially what they said was you guys, do you guys fit? We could get rid of the extra Y if we went with service trade. So we would be able to accomplish everything that we can with XY. And way... way... way more now with that being said, they did approaches that HR, they're interested in... in some type of... of partnership it sounds like. But no, I... I think unless Tim has any additional context, I think... I think that we would be able to kind of fill the need that extra Y, you know, are filled the functionality that actually provides?

TIM

21:08 Yeah, yeah. Well, and again, they have open API. So we, we're not opposed to it. We've had they, like I said, we have no, those guys buyer for four years there. Nashville. We're in rally, we're that far apart... but... but maybe that's correct. Most of the people that have XY end up just going to service trade and incense setting the extra. But... but again, they got open API, so not opposed to if there's something in there that's a value I'm trying to make that work.

MARIBETH

21:37 Okay. Yeah.

WILLIAM

21:38 Then Mary, Beth, just curious and you mentioned like coins, we... we don't run into a lot of clients tends to be not a household name. So it's amazing how many folks have never heard of it. So I find it interesting you guys do a lot with it or the assess what you made it sound like wow.

MARIBETH

21:53 We, we have certainly worked with several customers claims is clients is a little tricky because it is one of those all in one systems and we engage with a lot of companies that are super unhappy with the way that it performs on the service side because it's a construction accounting system.

--- *Accounting integrations* ---

MARIBETH

22:10 And the service piece was really an afterthought and meant to just optimize the connection into the accounting system and not the kind of customer service experience. People really don't like that service piece, what fills?

WILLIAM

22:27 Couple of things one.

MARIBETH

22:29 I...

WILLIAM

Was only bring it up because then, you know, where we're coming from. So can extend to your point service trade. You know, if, you know, service and points that's helpful because you can point out like, hey here's... here's, some things we know are going to be, you guys are going to be happy to finally be able to do because that, so that's one and then two. Ironically... before Scott, I got here, they actually chose coins probably five years ago now because of the service module is the storage. Yeah, that's the story out of all.

MARIBETH

22:57 Choices. They...

WILLIAM

22:58 Somehow they could coins because it was integrate server, they added service integrated. So I, again before our time and the guys are, I don't know Scott, I know you guys aren't complaining, but we also feel like they're stuck in the past a little bit and there's probably a lot of tools we're just missing out on competitive.

--- Accounting integrations ends ---

SCOTT

23:16 I mean, I think Mary Beth hit in the head. I mean, you know, which is the, which is the it's not unique to coins. It's unique than most ERP is that try to, that are really construction software and they, the service is tricky, right? And... and I don't know if I've seen the ERP at that really does service? Well, yeah, at least from the standpoint of we're thinking about the customer, not that I'm just how do we get the data into the tool to report out, right? So.

WILLIAM

23:41 My point is, though our guys are not at the door with pitch works. This is really you and I probably saying, hey, we need to move the ball here, guys. We need to get 20 percent tree and.

--- Paper process ---

SCOTT

23:50 Yeah, I, yeah, I think our guys and just, they're just not, they're just not to the... to the pain, right? That just.

WILLIAM

23:57 They just adapted and...

SCOTT

23:58 It is what it is. I mean, it's... it's not a it's not a... not a horrible system. It's just it's you know, you just trying to work around it. It's labor intensive. I know that.

--- Paper process ends ---

WILLIAM

24:08 And there were missing a lot of we're missing a lot of upside, you know, right? Not having a better tool. So anyway keep going just interesting conversation.

TIM

24:16 Yeah. Sorry, one thing on there real quick, Mary Beth, and you, you're right? The way we typically seeing and again, we're 1,000 customers into this now and you're right?

--- Type of work ---

TIM

24:28 Every single platform that we typically integrate with as campaign came over from the construction side and just to create a service call, the complexity just to do that because it thinks it's a construction job and it has to set up all this other stuff that, you know, typically you need to do AI billing, do other, all the other things that you gotta do it construction.

--- Type of work ends ---

TIM

24:49 And just to run a service call, it's just, it's amazing to us how complex it is when you're right? We're only focused on service. So we know that it's... it's a velocity game, right? You're gonna run, you know, every technician is gonna do maybe anywhere between 10 and 20 jobs a day. Multiply times the number of jobs. You've got your right? Our whole goal is to make it easy for you to get paid, get that work at that information in and get it out. And so you're right? It's just different in the way it's set up because it's not a construction job.

WILLIAM

25:15 But I mean, like we literally just had the conversation yesterday that, hey, you know, we do... do some residential, we try to avoid it and yet we have huge question issues because the guys can't take credit card out and feel.

TIM

25:25 Yeah.

WILLIAM

25:26 And our CEO is like, why the heck do you guys ever extend credit to a residential? Like why we do an ad? And I'm sure the answers because there's no, they just don't have a way to do it otherwise.

TIM

25:35 We're designed to do it. Yeah, yes. Yeah.

WILLIAM

And yet we're... we're taking right off. So this is silly. It's just like, why are we doing this so?

MARIBETH

25:43 I'm working with the prospect... prospect right down. He said, unfortunately, we've changed our customers to think that we're alone operation with our 90 day. It's... it's a challenge that... that people are trying to overcome for sure. Yeah.

WILLIAM

26:00 Yeah, same here.

MARIBETH

26:01 So, yeah. So, so I want to talk a little bit about kind of... of the way our data is structured. What you're seeing right now is our dashboard. When you log into service trade. This is the landing page that you find you're gonna see kind of what you need to prioritize in your business today, this week, this month, of course, your daily schedule, what you have going on either clock events over on the right hand side and wearing your technicians are clocked into any overdo jobs that need appointments that we need to prioritize. Hopefully you guys won't have 624 like we do in our demo account. Any jobs that are upcoming in the next couple of weeks that we need to get on the schedule, jobs that are ready to be reviewed and marked complete in the office and then jobs that are... are ready to be invoice. So we just to give you a kind of overview in terms of what is my priority today and what do I need to focus on? I didn't want to talk a little bit about the customer portal, but I think I'm actually gonna come back to that since that, it sounds like it's a, it's more of a nice to have for certain customers.

--- Recurring maintenance ---

MARIBETH

27:05 But what I want to talk about is, you know, we... we, of course, our customers do recurring services, inspections, preventative maintenance, and that's a... that's a pretty core component in terms of, you know, making sure that you're delivering on your customer promise. So we can certainly set up your services and whatever interval that you need to deliver those in. You're able to pull what we call a service opportunities report and you can kind of view the up to 90 days out and the I'm just gonna select one job that you can create bulk work orders from this page as well. So we're going to be working at join our high school. It looks like we have a couple of services here. I'm gonna take these off and only work on the H vac services. We have a scheduling. No, we don't want Jack to go out there. We have comments that can be for internal purposes or public purposes. If you do want your customers to be able to see that.

--- Recurring maintenance ends ---

MARIBETH

28:01 We also have the ability of tracking your sales team. So your administrators and your sales team can have access to service trade at no additional cost. So they're able to kind of track their quotes and... and manage their... their clients as well.

TIM

28:18 So, and this is sorry, this is a good example of the data that's in service Drake in Florida, things like Salesforce, right? So typically a lot of companies will find it when we find that when you're out on preventive maintenance and she'll, get through this and you find a deficiency, something wrong that can then flow over to Salesforce to allow them to action on that in the tool that they're familiar with to use. So again, that's that I get some of the information here does flow over to things like Salesforce.

--- Recurring maintenance ---

MARIBETH

28:46 Yup. So I'm gonna go ahead and create a work order for these quarterly services that we have do. So I'm gonna go ahead and create this job. And there's a couple of different places that you can find this information. One place I do want to go is I want to show you kind of the location page, which is where we house all of that information. The way that we structure our data model is that the top of the hierarchy we have the company in this case that's Denver public school systems. And then under the company umbrella, we have each location or site and what's your delivering that service timecard. I'm a location page.

--- Assets ---

MARIBETH

29:28 You'll find all of the asset information, asset details. One thing that's pretty unique to service trade is the level of depth in which we help to manage the asset information. All of the history not only falls on the work order and the location, but piece of equipment itself.

--- Recurring maintenance ---

MARIBETH

29:46 So you can see all of the services and jobs and... and repair opportunities and quotes that are tied to a specific piece of equipment. You're also going to see the services or the commitment of work that you've made to your customer. This could be a one time repair quarterly annual monthly, again, whatever interval on what you're delivering that service, the work orders, or what we call jobs and service trade.

--- Assets ---

MARIBETH

30:12 And you can see here's that unscheduled work quarter that I just created from the service opportunities page. And then you're also going to see all of the repair opportunities, all of these quick link back to the asset, the... the description or what we call the deficiency details, the work order number that it's associated with. So you can easily kind of navigate throughout the application and find kind of the information that you need.

--- Accounting ---

TIM

30:43 Come back to the chat room drop visual quick. You'll notice that the second one down had an invoice date of the details. So once... once you create a complete a job and you invoices in service trade, that goes over to her, over to fintech Sage intacct, and that would be the same reference, a ball number. So that way if you're searching in their system, our system, you'll be able to define the actual invoice.

--- Accounting ends ---

MARIBETH

31:10 Alright. So let's... let's go ahead and get a job scheduled. One thing I did want to point out we do have on that base scheduler. So you'll find in service trade that there's multiple ways to do things. We can kinda help determine throughout your implementation, what's gonna kind of be the best SOP for you. But we do have the ability to filter all of your work on a map based scheduler. So all of our technicians are, I'm over on the left hand side, I know that you guys have multiple offices that's no problem. We can segment your work by office. We can segment your work by what we call service lines. So each fact versus refrigeration, so on and so forth here's the job that we have a join our elementary. This is a drag and drop system. So I can drop this on the schedule. I could assign another technician if I needed to. I can also just input an appointment right here and say, okay, this is what time we need this. We need to get out there and estimated amount of time it's gonna take. So you can plan your work out on the dispatch board and layer workout and have a good idea of how much capacity each technician hands. And then once this is scheduled, since this is a same day, change, your technician will get a notification that says, hey, your appointment list has updated.

--- Access to information ---

MARIBETH

32:31 And then what will also happen is let me get my tablet over on the screen. And I think that... Andy mentioned you have all your guys using ipads out in the field. Is that across all the offices?

SCOTT

32:46 It, it... it is, it will be, yes. Okay. It's not... not current today. But... but yeah, that's the... the plan.

MARIBETH

32:55 Okay. So I'm working on an iPad right now so that's great. They can use phones, tablets, android. Or iOS. And so like I said, the technician, I'll get a notification that their appointment where it says updated. And then they'll be able to... to see that job on their tablet in real time. So any questions about that process? So for so far before I dig into kind of the technician via?

--- Tech On-site ---

SCOTT

No, okay.

WILLIAM

33:22 Keep going.

MARIBETH

33:23 Cool. So what I'm gonna do is we have, first of all, I want to clock in. So we do have that ability to clock in for job prep if they go to a vendor or if they, you know, come into the office and pick up things that the warehouse, they can also clock in... in route. When they do that. Like I mentioned, they have the ability of sending this to I'm sending an en route notification over to the customer. So Bill, do you have access to your email... or Scott, you know?

SCOTT

33:59 Yeah, I do.

MARIBETH

34:00 Alright. I want to send it to you though. I'm just gonna send you a couple of things that the customer would see just so you can get a good idea of what the customer experiences. So they can clock in... in route. We take a GPS timestamp when they're performing clock events so that you can see one where they are at, in relation to the location when they clock in and route, but also just some additional accountability that ensure when they clock in on site that they actually are on state. So once I arrive, I'll go ahead and clock in that way, all this stuff is showing up on the work order and the office in real time. We can see the services that we're out here to complete a couple of quarterly services, the estimated price and estimated time.

--- *Access to information* ---

MARIBETH

34:44 You can hide that from your technician. I have full administrative capabilities so that you can see certain things that maybe you don't want your text to see, but there's different roles and permissions that you can assign each user to kind of work so that they can perform the functionality that... that... that they need to.

--- *Assets* ---

MARIBETH

35:04 Under the comment section, this could be, you know, maybe I want to record that. There was an access key code somewhere. So I'll put this in. This is going to be a location comments on every job that you schedule at this location. This comment is going to show up for the technician or I can save just a work order comment.

--- *Deficiencies* ---

MARIBETH

35:22 If I want to. The deficiency is going to again, this is the term that we use for any repair opportunity that your technician finds while they're out on site. This is the first snapshot of work history that they'll see, they can see full job history of the technician who was previously out there. Any attachments that we're... we're added to previous jobs like PM checklist or, you know, tasking sheets, things like that, but.

SCOTT

35:50 I wanna kinda walk.

MARIBETH

35:51 You through the process of what happens if a technician find something that is deficient. So we'll go ahead and say there's a broken compressor, they can talk to text year so that's no problem. If that makes things a little bit easier for them. So I'm gonna go ahead and take a picture. So, you know, you're asking about excel I, and... and what that you're using that to kind of gather all of the attachment, show your customer which is great. But again, we can do this all within the application. So I can take a picture. I can take a video. I can record an audio on them out. So if this competitor is making some weird wonky noise and I want to pass them along to the customer, I have the ability of doing that or they can use that to say, hey Scott, these are the parks, Amy, this is how long the repair may take. I'm going to designate the severity level of this rep here. So I'm gonna say that it's in our bubble. And then I'm going to tie it to the unit or the asset that this is associated with. So that... that falls on that asset history as well. So we'll tie it to this.

--- Deficiencies ends ---

MARIBETH

37:00 They can unit here's, the list of service lines. You're only gonna see what's applicable to your business. So don't be overwhelmed by this long list that might not apply to you will configure your account for your business. If the tech has the time the parts it's a smaller repair, they have a do not exceed.

--- Deficiencies ---

MARIBETH

37:21 Then they can mark this is fixed. We still want them to go through that process for history purposes. But we can also mark this as new. We can indicate a potential repair solution. And then once I save this back, what's going to happen is you can turn on a notification for the office so that every time a deficiency is recorded in the field, whoever I mean, it's a quote that out for repair can get a notification email. And it will also show up on the work order page as well. So on the work order under the deficiency here's, the broken compressor on the daikon unit, the job that we're working on today. And then the email that can be sent to your office is gonna show all of these deficiencies details with the unit, the job who reported it, all of the deficiency history and related deficiencies, so that, you know, that you're always making the best recommendation to your customer. And then we'll of course, pass along the attachments that the technician shared or found out in the field... questions about that process or how does this compare to... to what you guys are currently doing? Are... are really maybe it's what build up says.

SCOTT

38:43 It's it's probably far exceeds what we're currently doing. And I mean, I think, you know, other than.

--- Deficiencies ends ---

WILLIAM

38:49 Look.

SCOTT

38:50 And feel, I mean, it looks and feels different then, you know, then I think the BuildOps platform, but I mean, I think the functionality... is relatively the same. I don't see anything. I mean, all of this stuff gets, you know, the history of, you know, one of the things that one of the reasons we, we've sort of shift to the X ally with the ability to have data in history around job drive.

--- Assets ---

SCOTT

39:13 So, when somebody goes to the customer site and they go to a piece of equipment, they can pull up, hey, there was a technician here last month, maybe have xyz linked to sort of see that history. And I thought I heard you say everything sorta get saved either the asset level, where the job level?

--- Assets ends ---

MARIBETH

39:28 Both, and the location level. Yep, that's right?

SCOTT

39:36 Can we, can we jump around a little bit?

MARIBETH

39:38 If you'd like to, I'd like to show you what the quote looks like, but.

SCOTT

39:43 Yep. No. Let's... let's... let's... let's... let's keep going. Yeah, that's... that's a good. I do have since was, I didn't want to just given time there's a few things I do want to dig into, but I want to see this all the way.

--- Quote templates ---

MARIBETH

39:54 Okay. So, so right from the deficiency details page, we can create a new quote will pop an expiration date on here. I can update the service description or any misspellings from the technician. We have the ability of importing quote templates. So for any common repairs that you have like a compressor replacement, this is all configured for your account. This is your verbiage. We do have the ability of getting your items list in the service trade with your standard unit cost. You can tie items to both service and quote templates, and then you can make any adjustments as needed. You can determine the level of detail and what you want to provide this to your customer.

--- ST app contracts and pricing ---

MARIBETH

40:37 But as we like to say, there's margins and mystery. So you have the capability of designating pacing contracts. So based on the mark up rules that you've negotiated with your customer, we can default that contract to update the pricing as well as determine whether something is taxable or not.

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

MARIBETH

40:57 We will give you the margin on both the... the quotes and the invoices before your customer ever sees this. And then once this all looks good, and of course, we have these attachments for the customer as well. Once this all looks good, we can send a copy over to the customer, says that I'll drop a copy of this into your inbox. I can turn these on or off. If I don't want the customer to see them. I'll send that over to you. And then they'll I'll pull this up on the screen so you can kind of see what the customer's going to see as well, but.

WILLIAM

41:28 Yeah. So, Mary... Mary, Beth, come back to the cost to get the margin. Is that being pulled from the ERP?

--- Parts management (inventory) ---

TIM

41:33 Yes.

WILLIAM

41:34 Okay. Thank you.

TIM

41:38 Now, typically, just... just to be totally transparent on that, you know, when you parts, especially today, the prices are changing and a lot of people actually will use service trade. Is there there are sort of record of truth for their inventory and their parts, and their pricing, but yes, it either way it works?

WILLIAM

41:56 I think the inventory, yes, because I mean, really, we're down to just the only inventory with carriers on the service trucks. So.

TIM

42:01 I...

WILLIAM

42:01 Think that makes sense. But we go back and forth on, you know, are we point of standard or we do we have a standard costs loaded into, you know, like in this case, service trade or we point actual costs from the system to get margin. I mean, that's for us today, I think it's all actual, Scott, I don't think we use standards but.

--- Quoting ---

SCOTT

42:18 I think well, I mean we're...

WILLIAM

42:19 Open to moving the standard type thing.

SCOTT

42:21 Yeah. I mean, I think they, when we... when we estimate work we have, we do it based on sort of if we're quoting a job, it is based on some sort of standardized... average... average. We know, our average check rate is X.

--- ST app contracts and pricing ---

TIM

42:36 Yeah.

SCOTT

42:36 I occasion rate is why, you know, or we can just do a standard street rate. Yeah, we have, you know, we have co-op contracts and have fixed price, you know, what we can charge for labor. So there's a... there's a... there's a bunch of ways. I just, I got the quote. I see I can approve it right on the screen if I hit it because it, if I hit... I hit approve.

MARIBETH

43:02 Or it, you won't break anything.

SCOTT

43:04 Just sort by the way there. Yeah. So this is all... all makes perfect sense?

TIM

43:10 And we can accommodate all those different scenarios you just talked about because you right there's different, some people have just guarantee pricing and the contracts are working so on. So all that is definitely all sort of controller handled inside the application.

SCOTT

43:24 The, so we will go back to that estimate a little bit. I'm just kinda keep me the inputs that go in there. May I saw screen were, you know, this is... this is all still kind of happening whereas the three hours of labor coming from the five pounds refrigerant, where it is, that, is there an input? I mean, we input it into the tool some place.

--- Quote templates ---

MARIBETH

43:45 So, so these items that are specific to this particular quote are because I applied the... the quote template... so you can tie items to the template. I mean, of course, you can put in a custom description. You can input your parts. One by one, you can update the parts if you need to. But this is just kind of a way to get you guys started.

SCOTT

44:08 Okay. And then if they start with the template, then they can... they can tweak.

TIM

44:12 And got to put everything. Yeah. Typically you want to put even if it's typically five items, put all five or 10, but all 10 on there and let them take off or just with.

--- Quote templates ends ---

SCOTT

44:22 Yeah.

TIM

44:22 But that's okay. That's the... that's the right way to do this is Mary, Beth, we're showing you have a CNN with one way a bit, you know... you know, however you want to do it, you've got your options depending on what the... what the situation is. And then if...

--- Quoting ---

SCOTT

44:37 I approve... terms and conditions approved quote. So, is there a notification that comes back to the quote has been approved?

MARIBETH

44:48 Yeah, you can actually get a notification when the customer reviews it as well. And then it'll show you on the quote, who approved the... the date and time stamp, and we check the history as well. So I can see when viewed it. When you approved it, it's date and time stamped with an IP address. And then you can enable the notifications if you want to as well.

SCOTT

45:10 They would have the opposite automatically become... a job.

MARIBETH

45:16 Does not, but you can create a new work order or add this to an existing work order if you want so. And then of course, we want to give you the ability to maximize all the pull through revenue. So you have quote reporting as well. And you can filter this out by status, expiration, date, customer location. You can bulk re, send these out to your customer or send them out one by one as well.

--- Quoting ends ---

SCOTT

45:43 Hey... can we?

MARIBETH

45:46 He can?

TIM

45:47 Let's...

SCOTT

45:47 Jump over, let's talk a little bit about maintenance agreements.

MARIBETH

45:51 Okay.

SCOTT

45:54 You know, why don't we have a, you know, I'm just give me kind of the overview of how you guys approach a maintenance base. What analytics, how do you... you know, sort of scheduling? Do we ours, I mean, when we look at one of the things that's really... really important to us is the ability to look out in the future in terms of what our scheduled hours as relates to, you know, maintenance base based on, you know, we've got... we've got, you know, 300 agreements and we have... we have, how do we, you know, how do we get the schedules for the year? Put in the hours for the year? Put it in, how can we see total hours scheduled each month for just specifically for maintenance... maintenance?

46:34 Yeah, that's a good question. So I'll... I'll give you a little bit of context.

--- ST app contracts and pricing ---

MARIBETH

46:38 And now, I'll probably let him elaborate a little bit. When you are setting up these services, you do have the ability of putting in your estimated price as well as your... your estimated time. We have the, on our enterprise level, you have access to Redshift which is the data warehouse where we... where we store all of your data and we can pump that information into quick site reporting.

--- Recurring maintenance ---

MARIBETH

47:02 So I'll just pull up an example. And then while I'm pulling up what this looks like, I'll let him kind of elaborate. And I actually have an example of... the... the preventative maintenance hours as well. I just gotta find it real quick.

TIM

47:18 Yeah. So we, so what she's talking about is within service trade, there's a couple of different ways to manage your contracts. If you want to see workload by month, the service opportunities... opportunities which you showed you earlier, and we can show that again, that's how you see all your services monthly.

--- ST app contracts and pricing ---

TIM

47:38 And again, you could reject that out. And again, you've got different ways to see that there's also an ability for you to see how you're doing on that contract, right? How much it, by how much PM or by down against what I can do, you know, I've done the to quarterly is I got two more to go. You can see the profitability on that. And then has because we're Mary Beth going know, all of our data is structured data, meaning that it's all connected in a way that if you want to run specific reports about anything, you have the ability to get down to a granular level specific to a job, to a... to a technician, to an asset or labor... labor, you know, labor by PMS by customer density, it's all in there.

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

TIM

48:26 And again... we use... we use something called quick site to do the visuals. But if you like PowerBI, or demo or any of the other tools Tableau, you know, all that data can be bumped over pumped over that, for example, with... with fintech, same thing, right? They're doing the same thing. You'll... you'll probably have a BI tool that you're bringing in intact, you're bringing in service trade, you know, any other pro core, maybe you're bringing in all of these different data sets into a BI tool. And then this... this is just an example the BI information that you can pull... in.

--- Recurring maintenance ---

TIM

49:03 There, you go there's a summary summation by service lines... I'm workload by month, and you can break it down by services versus PMS or again by... by divisions by alarmed by sprinkler by H fact plumbing electric.

--- Recurring maintenance ends ---

MARIBETH

49:22 Yeah. The, this... this is just an example live dashboard. And as Tim was saying, this can be completely configured based on the KPI'S that you all want to track. So how... how do you guys do that now?

SCOTT

49:37 In excel spreadsheet?

TIM

49:39 Yup. Yup.

SCOTT

49:40 You know, so we... we, I mean, it's a couple of it really, it's really the reason why I'm asking is it's really difficult?

--- Implementation and ongoing support ---

SCOTT

49:46 We just, we don't have good reporting data around maintenance agreements, renewals, scheduling the renewals when they come a, you know, 120 day renewal process. We just, it's... it's something that the acquaintances and start really good at all of our, all of our KPI'S are just sort of their manual process that we kind of go through.

--- Type of work ---

SCOTT

50:05 They look very similar to the ones you got. One of the things that I am curious about. And so we may have covered this. So we have, you know, inside of our service organization, we have... we have specific lines of business that we have HP AC service, we have control service and we have plumbing service.

--- Type of work ends ---

SCOTT

50:23 And then, you know, when you look at those lines of business and we have work types, whether it's a time and material ticket. I quoted, you know, just a quote and repair ticket... or quoted kind of project ticket. We have... we have a team called service retrofit and what they... they do kind of, you know, zero to 250,000 dollar like for like replacement type work, right?

--- Pricing ---

TIM

50:47 Yeah, yeah.

SCOTT

50:48 They're they're more of a quick response or their projects team, but they don't... they don't do PLC accounting. It's usually less than 30 days. So we just, we always right on service tickets.

--- ST app contracts and pricing ---

SCOTT

50:57 And so one of the image or department level of kind of functionalities, and so being able to look at the business and understand it, either, you know, type of work, you know, maintenance... maintenance hours, time, material hours, quoted, hours, service retrofit versus, you know, plumbing or control expenses because a lot of ways to sort of slice the day.

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

TIM

51:20 Yeah, yeah.

SCOTT

51:22 And so, I'm kind of sick when... when you're look like you guys have sort of an icon approach when you looked at your services kind of tell you... what... what it was, right?

MARIBETH

51:36 This is the indication of... of what we call our service line as well.

--- Assets ---

MARIBETH

51:40 And then things like PM repair or emergency that's what we indicate as a job type so you can pull the different job types that are related to the specific service line. So just like you said, there's... there's a lot of ways to skin that has sort of.

TIM

51:59 Yeah... yeah.

--- ST app contracts and pricing ---

TIM

52:02 We are... we are data sort of driven underneath meaning that we try to connect everything to like you said. So, so there's granularity, very... very deep granularity in the data so that you can pull and do reports and type of the level that you're talking about doing it.

--- Type of work ---

TIM

52:18 You know, you can do it by like she said, by repair versus maintenance, you can do it by service line, right? We're doing, you know, this is deploying group. This is the controls group, same thing with the text, right? You probably won't have your controls guys going on a plumbing job, right? Because your control guys are more sophisticated typically than a plumbing. And so again, you can even break out service trade to have these groups of people based upon the type of jobs that they do the.

SCOTT

52:46 You know, the other thing we, it's really manual process right now, but... we do try to track, we incentivize pull through work, right? So, for a technician.

--- Type of work ends ---

TIM

52:56 So...

SCOTT

52:57 I want to be able to, and we want to be able to see in a month. No, where did this pull through work opportunities? You know, where... where they originated adequately run point? Can we isolate, you know, kind of biotech and he's there were... there were hired?

--- Quoting ---

TIM

53:12 Heck, yeah, yeah. We're big on that too. And same thing with deficiencies, how many... how many of them are going out on the PMS even reporting deficiencies, right? Because a lot of guys go out there and do it and they're leaving opportunity the pull through on... on the table.

--- Customer engagement ---

TIM

53:25 So we... we have a report that people low, which just shows them, hey here's my top, you know, all per job, how many jobs are you finding the business? It's 20 percent of the time, 30 percent of the time at 10 percent of the time. Yeah, no, it's... it's good to it's a thing.

--- Customer engagement ends ---

TIM

53:39 It's a real thing engineer, right? I mean, that pull through us that's... that's your margin that's incremental dollars.

SCOTT

53:45 The I'm trying to sort of think through... as it relates to, we talked a little about inventory and this may be a, you know, how did you guys want?

--- Parts management (inventory) ---

SCOTT

53:55 We... we have significant challenges. We... we have essentially, you know, got our inventory down to just refrigerant, right? So we have, we used to try to inventory a whole bunch of crap and it just, it's really painful. And... but... but how do you, I got two questions I don't wanna forget.

--- Tech time tracking ---

SCOTT

54:12 But before I go to the inventory and let's go back to the clock in clock out notification. So, you know, today... I don't... I don't know if we even have the clock in clock out functionality inside of coins. So at the end the, you know, the end of every day technician sorta manually input task and four hours here, I spend four hours there too, you know, whatever it may be using sort of manually does this time, which is not necessarily a bad thing is, you know, are we... are we locked into the sort of en route onsite job prep or can we manually override? And just technicians kind of, you know, the ability to... to... manually input their time for a job?

TIM

54:53 They take manually input it... what's the... what's the why... why, and again, always wondering that the desired outcome that you're after because we have time card tools to and things like that.

--- Tech time tracking ends ---

SCOTT

55:07 God, I mean, I think it's I'm not opposed to either one but, you know, sometimes... I'm... I'm... I'm... I'm it's probably purely more of an empathy thing for the technicians in the field in Arizona at 120 degrees to have to remember to go. If they forget to clock, you know, on side, if they forget something, you know, am I

losing ours? Because I'm relying on a technician to... to remember to click a button... as opposed to just, hey, look, you know, my day started at seven. Am I was there? Three? I got eight hours on the day, you know. So I'm not saying it's... it's I don't know if I have a... a preference for either or I just wanna make sure that either or is available. So as the team walks through kind of how they... they think about it, they... they have some options.

TIM

55:56 Absolutely. And... and you're... you're not wrong? I mean... the text, I have a hard enough job as it is and you're right?

--- Tech time tracking ---

TIM

56:04 We also have something called a time card tool which allows them to see at the end of every day at the end of every week, how many do you have? Where they've done their jobs and how many hours a book? And then they go in and fix it and say crap, I forgot to clock in and clock out or do this.

--- Tech time tracking ends ---

TIM

56:17 And so you're right? They can summarize and fix it. You know, the is along the way, if you will. So.

SCOTT

56:24 Yeah, because I'm in the inner out, functionality is really slick, really neat value add tool. I just don't want to rely on missing. There's a couple of things, right? If I... I think a little bit about... customer experience. And... and now I'm relying, you know, if a customer gets an interrupt message from one tag, but the next step forgets to do it, then I got sort of the customer saying, hey, you guys, you know, I'm getting... I'm getting an inconsistent experience and I think, you know, kind of create some customer sat kind of challenges for us. So again, I don't have it. I just wanna make sure I, my... my question is make be able to make sure that all of you know, we've got multiple ways to get time to jobs and.

--- Parts management (inventory) ---

TIM

57:02 Yup. Yup.

SCOTT

57:04 Sounds like you guys have got it. But go back and going back to... inventory management. It, does that happen inside of service trade or is that happening inside and say an Intacct or whatever the program? Where does that? How does that functionality? And... and how are we tracking and monitoring how we inputting things in and taking things out of inventory?

TIM

57:25 Question for you? Because you do just in time inventory which is 90 percent of our customers, which is great. Would you want them to be able to create a purchase order in the field? No worries. I get to the parts as I pick it up. Give me, you know, hit the button, create a po, drop it on the ticket or would you want the back office to create the purchase order?

SCOTT

57:47 That is absolutely fabulous question. I think today, it's done by the back office, but that may be just because of functionality, not necessarily best practice, right? So.

TIM

58:01 Got.

SCOTT

58:01 It, in a... in a perfect world, I would like to be able to... to set some rules around and we can get, you... you can get a peek, you can parts, you know, technician can purchase up to X dollars on a... on a, you know, a... a po out of... out of the tool.

SCOTT

58:15 If it goes above, you know, whatever it is above 100 bucks and they... they got, you know, it's gonna cost them back to the back office and make sure we're you know, we're spending money correctly?

TIM

58:23 Got it. Either way. It works with us. If they're doing it in the field, we have, we... we do this thing. It's called parts ledger and it will automatically assign a po to the products that they buy in the field. And then it will allow you to keep track of your cost.

TIM

58:37 And then if the cost come back from the invoice different, it'll adjust that when you put it in and it will automatically change inside of service trade to keep your true cost of what that job actually cost us to Mary Beth and show you a real quick. This is just like doing this manually.

TIM

58:52 But the theory is they're out in the field on the app, they hit the parts house and how it automatically assigns it to that technician from that part sales and assigns of yeah, one, two, three four. And then it'll say order not yet received depending on what the status is, and then the delivery the when they... when they pick them up.

--- Invoicing ---

TIM

59:11 And then again, that's all sinked up so that... when you get to the invoice, that all make sense. And it matches the invoice that you get from apart house now.

SCOTT

59:21 One of the, I know... I know one of the pain points that... that we have today, I think you're... you're describing it but, you know, we, it's usually happens towards the end of the month, right? We... we have this really comprehensive reconciliation process of, hey, these are the tickets that are complete.

TIM

59:40 Do we?

SCOTT

59:40 Have all, like, do we have all the cost accounting for what has been committed?

SCOTT

59:43 But that invoice yet? You know? So one of the things it's really important is it 80. And I think, you know, whether it's... whether it's at the technician level or the back office level is to understand. And these are all the things that have been purchased against this job. He hasn't been written, you know?

TIM

1:00:01 Yes.

SCOTT

1:00:02 Yeah, no, this is the right inside of coins. There's an entire commitment process. You can write a peo, but if you don't commit to the job and, you know, that that's just a, it's an extra click and some that ability to track, you know, whether or not it's been received or invoice. We know that it needs to go on the job and having that visibility, you know, on a daily basis is a really big deal.

TIM

1:00:25 Absolutely. And I guarantee you is by somebody fulltime job. It should be because most of our companies that are, but, and Mary Beth can show you that. If she goes up to a jobs screen now, you know, and again, somebody I'm sure lives in this every day, which is show me all the jobs. And I'm waiting on parts because again, once the parts come in, get it... get it... get it created, get it out, right? Saying they're not running that job was costing you money, but there it is right there, you can run, you can see and again, you can see this natively inside of service. Great. You don't have to go out to the BI tool to see this. But there's parts partially receive there's, parts overdue for delivery person to be ordered.

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

TIM

1:01:00 Our servers, yeah, received. And then you can run that. And if she just clicks that one and runs it, she'll get all the jobs inside of the service trade, but that status?

MARIBETH

1:01:09 You guys?

WILLIAM

1:01:09 I... I sorry to interrupt. I do have a, I do need to jump... Scott, you might be able to keep going which is even more important, so.

SCOTT

1:01:18 Thanks.

WILLIAM

1:01:18 For, thanks for the time. I enjoyed it. It's good stuff.

MARIBETH

1:01:22 Thank you, Bill. We appreciate your time. Hopefully, we'll be talking to you again in the future.

WILLIAM

1:01:27 Right. Thanks.

MARIBETH

1:01:28 Thanks. Have a great day.

TIM

1:01:34 Okay.

SCOTT

1:01:35 Yep. So if we so like one of the things and this is... this is great for me. What I'm really interested in is when I, when I'm at the end of the month, when I look at a job and I'm trying to decide... is the job ready to invoice, right? And... I got this job technician is market complete, and this is a real life experience for so, and, you know, the team literally, I think I may have this event at the end of every month before they officially, they may build a job especially with the quality job, right?

--- ST app contracts and pricing ---

SCOTT

1:02:17 And they may... they may Bill it when the technician is complete. But as it relates to closing the job ad completely, there's an entire then around like, hey, do we have any committed cost on this job? But we haven't been invoice yet.

TIM

1:02:30 Got...

SCOTT

1:02:30 It. And... and so the concept of being able to track, you know, if you look at a job, can you see, hey, we, you know, there's a po written for 100 bucks and it's... it's accounted for in the job before we close the job kind of irregardless of as an invoice showed up and we do it just with this job on the twentieth of the month and maybe the second or third before we get an invoice that I'm trying to get the job filled out and closing off the books kind of how... how do you, how do, what visibility there's the team have just kinda see what po is, has been issued against the job?

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

TIM

1:03:03 Yeah, that's a good question. Multiple ways to see that. And I think what Mary Beth is the reason why she's still hanging onto this page right here is we should probably complete this job just so you have a sense of how we do this?

--- Tech On-site ---

TIM

1:03:17 Back to the, this is the original job that she was on. So we weren't we found that efficiency and we did our two things. The tech and I'll let you go man.

MARIBETH

1:03:25 I actually was doing it in the background, so I went ahead and clock out of that.

TIM

1:03:30 I'll...

SCOTT

1:03:30 I'll clock.

MARIBETH

1:03:31 Back in and just show you how to do it. So when the technician clocks out, the technician does not have the ability of completing the work order. So typically people want a review process in the office to make sure that everything looks good. So the tech has the ability. So the first time I clocked out, these services weren't completed, but once the services are complete, the technician has the ability of doing that, and they also have the ability of completing this appointment. So once that happens, you'll see, okay, the services complete, this appointment is complete, but this job is still in progress that... that control remains in the office.

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

MARIBETH

1:04:09 So, hello, this is the review process. Do we have items that are still I'm waiting to be received? Or do we have a po that's associated with it? Do we have to reconcile any of this before we invoice the customer? And... and on the same page as here, you can pull, you can pull just like you can pull parts with orders not received.

--- *Dispatch* ---

MARIBETH

1:04:32 You can base it based on, you know, where are my jobs or the appointments are complete, where my jobs, where the services are complete. But yes, there's absolutely the ability of being able to have that visibility visit.

SCOTT

1:04:47 Hey, let's just show. It doesn't show here. The, these are the po. So these are the, these are the parts that were purchased.

--- *Pricing* ---

MARIBETH

1:04:54 Yeah. So here's... here's that po number one two three four that's associated with it, the status?

TIM

1:05:00 She put it on labor which really wouldn't be too bad.

MARIBETH

1:05:03 Yeah.

SCOTT

1:05:04 Okay. Okay... okay. Gotcha. That makes sense.

1:05:07 Yeah. But if it was the feedback would be 41, part number three six, five four, one three. Yeah yeah... yeah. Yeah.

--- Parts management (inventory) ---

MARIBETH

1:05:18 What were you gonna say?

SCOTT

1:05:20 That, the amount?

TIM

1:05:24 Yeah.

SCOTT

1:05:26 What I'm trying to figure out is, do I know that po was written for 100 and 100 bucks?

TIM

1:05:31 Correct. Right. So, there is another whole screen or the whole section of service trade that is just for inventory and parts management that you're right?

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

TIM

1:05:40 They'll see all the on they'll see all the orders that have today, right? Who they, what job they were on? And then they'll be able to... to start reconciling those when the... when the invoice when the Bill comes in. And then that's what I was saying. If the price changes, let's just say things today, the parts house there.

--- ST app contracts and pricing ---

TIM

1:05:57 Nope. That wasn't 30 dollars. It was 35 dollars when they go to close out that... that weren't that ticket from the part-time it will automatically come into service stream and change that the 35?

SCOTT

1:06:10 Yeah.

MARIBETH

1:06:12 It will, it will essentially override whatever cost was input or whatever your standard cost is to update it up to... to automate the actual cost.

SCOTT

1:06:22 Based on based on ap... okay.

TIM

1:06:27 That's exactly right now.

MARIBETH

1:06:28 We...

TIM

1:06:30 Best thing to do would be to have a deeper conversation about this because... because you're right there's ways to also in tech has its own inventory management system. So and again, just depending on how you want to do it, they'll be... they'll be different things that we can show you. But you're right? We... we have a whole nother part of Thursday, what is just for parts management? And we... we say it's for shrinkage... shrinkage, leakage, right? And it's exactly the problem you're trying to solve, which is, how do I make sure that I get paid for all the parts that I put on a job? And how do I make sure that I'm a billing correctly to... to make sure that I don't lose my, you know, lose my money because I didn't correctly account for... for parts on the job. So, yeah.

SCOTT

1:07:11 How do you guys handle? One of the things that the team is... is, most of that is driven by the fact when we used to keep this really large inventory. And again, you can imagine it was just impossible management. I kept... I kept running off the inventory every quarter. And so we just went today, like we're just gonna we're... gonna, we're gonna, why any... we... we... we... we don't... we don't inventory? Any parts in terms of a true inventory, where they are in a warehouse guy can go pick up a... a contact or in, hey, I gotta... I gotta sign the job and just the... the transaction from out of inventory onto a ticket just to, you know, the accounts never match it. Was this too. So we just said, hey, like we're gonna wipe all that out. We're... we're only gonna track refrigerant because legally we have to track refrigerant, everything else. We just treat, you mean the guys do keep what we... what we think of more in terms of consumer.

WILLIAM

1:07:58 Hello. Now, we've sort.

SCOTT

1:07:59 Of shifted our mindset to say, hey, look contactors in little... little things. We're gonna just consumables. And so, the team has implemented this concept of, you know, based on the size of the ticket, we apply a consumable charged to the ticket, that kind of exposed to cover all the nuts and bolts, right?

TIM

1:08:17 Yeah.

SCOTT

1:08:18 We don't track it. Yeah. Can we... can we standardize add inside the?

TIM

1:08:23 Absolutely. Yeah. Yeah. And we, same thing, we have fire companies to do the same thing. It's just a set fee that they put on those jobs to capture that. Yes, absolutely. We... we constantly see sometimes to where the technicians or go out for the bar task.

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

TIM

1:08:40 It will literally say box of stuff. And then in the back office work or break it out. And then that way they can account for it because you're right? It's a, it's this. It's that it's whatever, but the technician just puts it on the po and just, you know, grabs the items that you need.

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

TIM

1:08:54 So... by the way... one thing that, you know, we... we try to tell people is, you know, it's... it's a walk not a run and we really try to... to make sure we're there to help you drive the business to... to the efficiency in the fall through and measuring all that. Because that, that's important that's... that's big does too. I mean, I'd love to see your margins, you know, 30 percent go to 50 percent, right? And again, we do that by how can give you that visibility for things like this. And we know that doesn't start day one, right? We know tier point getting... getting text just to clock in and clock out and get into that habit, right? Yeah, that's step one, step two is our, then let's get that. Let's get the right items in there. And step three, you know, so we are big, we're trying to work with our customers to... to get to the, get to that optimal state. But we know it doesn't happen, don't want?

--- *Dispatch* ---

SCOTT

1:09:46 Can we, can we look at this? Can we go back and look at the dispatch?

WILLIAM

1:09:49 For...

MARIBETH

1:09:49 Sure. I actually haven't even for the dispatch Florida.

SCOTT

1:09:56 I was.

MARIBETH

1:09:57 Yeah. So we have the... the map base scheduler, the dashboard on the portal, your customers can request service. And then the dispatch board, our demo account is broken up by office. So you can filter that way, you can also access all of your available work quarters based on the job type as well as service line. And then you can field any reactive calls from the dispatch board as well.

TIM

1:10:28 The way to help with that clocking in and clocking out so you can see, we're joiner, she's got a little dark blue and then I'll like blue that tells you what the... the tech has clocked in and clocked out.

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

TIM

1:10:38 And... and then the red line of course, is the exact time right now. But, you know, the... the... the... the desk, the schedulers can also try to help them out and say, hey... hey, by the way, they can't get their next job until they can clock out of the previous jobs.

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

TIM

1:10:52 So that's the other thing that we do. Other things like that... that help you with this sort of, you know, best practice to get these guys to do what they need to do just by... by the motion that they go through every day.

SCOTT

1:11:02 Yeah, no, that makes sense.

--- *Dispatch* ---

SCOTT

1:11:03 Is it, what do you have a map view? The... the cell phone? So track kind have a map view of the... of the technician based on where they're at?

TIM

1:11:12 Yeah, that was on the first page, the dispatch board.

MARIBETH

1:11:15 The dashboard?

TIM

1:11:17 Okay. Alright. Yup. Dashboard. Thank you very much.

MARIBETH

1:11:23 And then, and then the map based scheduler which I showed you for kind of laying out your work in planning your workout.

SCOTT

1:11:29 Yeah. So, so... a call comes in, mercy call comes in from a customer. They can go to kind of the map view, see maybe who's closest to that job science to them kind of use phones protect, you know, technology to kind of help make them work smarter.

--- Dispatch ends ---

MARIBETH

1:11:45 Yeah. So let's let me just kinda show you.

TIM

1:11:51 I have multiple screens will go into a customer now and they got like three screens up because each one of these are tab and to your point, you just that one tab up with that one tab up with this.

--- Assets ---

MARIBETH

1:12:00 So the... the dispatcher can... can feel the call from the dispatch board. They'll be able to see a list of all the assets at the location, the buildings, a default asset, your customer won't always know what exactly is going on. So they can tie it to the building with the description, and then they can add a technician right here.

--- Dispatch ---

MARIBETH

1:12:20 But what they also have the ability of doing is kind of putting this in a holding pattern or what we call an unassigned bucket so they can service the customer, you know, reassure the customer that they'll get someone out. And then once they go and refer to the map, they can just go ahead and drop it on the technicians. Okay. I was just gonna say these different colors indicate a different job types. So emergency is red, purples, preventative maintenance. And like Tim said, they'll also kind of see some key indicators of clock events, whether a repair was documented with our paperwork was uploaded and things like that do.

--- Dispatch ends ---

SCOTT

1:13:02 And we're seeing a lot of this is this specifically kind of came out of the pro core model. But... and I know I've... I've talked to, I know when I talked to X alive and the capabilities I think build after, but you, Israel is, relates to assets and the documenting a model and serial numbers mean any sort of... of can't think of the term... the picture recognition to where it auto fills or do the texting me when new assets come on board?

--- Assets ---

SCOTT

1:13:32 How do we get that information into the system? We get... we get new... new customer, we go out service piece of equipment. Is there a way to... to?

TIM

1:13:43 Yeah, you can... you can barcode label them. I know what you're talking about with X or why they have?

SCOTT

1:13:49 Take a picture of the main place and have that information, optical reader, input it into the tool.

TIM

1:13:55 Yeah. The... the thing, the difference is that ours is structured when I... when I mean structure with... with the extra wide tool.

--- Assets ends ---

TIM

1:14:04 What it does is just revisiting the dumps over to that field on the right. I've actually seen it but it doesn't really put it into any type of a structure. If Mary Beth pulls up our. So we do have an ability to pull some information at where we want to go.

--- Parts management (inventory) ---

TIM

1:14:17 Is kind of where you're talking about, which is sort of the path I'm on eventually which is if they would standardize those upc codes by manufacturer, by Johnson, controls by you, TC by all of them. I can absolutely pull out that information in. Unfortunately right now there's no standards across all the manufacturers to some work some don't... but yeah, when you pull up an asset, if she just pulls up the detailed, the asset, it's got the serial number, it's got the part number.

--- Assets ---

TIM

1:14:44 It's got all that information. Now, it's not dropping automatically. All of it in there with OCR with character recognition... but... but that... that is where things are going. That's where we're going. But you're right? It's not across the board yet on all manufacturers.

SCOTT

1:15:01 Okay.

TIM

1:15:03 I'd love to see that... that is... today would be perfect scenario by the way I've talked to another company called blue on and they're doing something pretty cool to, they've got all these manuals and, you know, they actually get the partial list on every single piece of equipment.

--- Assets ends ---

TIM

1:15:20 So we... we talked to them about saying, okay, fine west system, that would you got service trade? Let them go use something like that. And then, you know, what I care about is okay, they did the jobs. These are the parts of the use. Somebody already has the technology. I'm not gonna, I don't want to reinvent the wheel.

SCOTT

1:15:37 Yeah. I mean, I think that's a functionality of X ally, the idea that, you know, you can scan a name plate and they've got some database IO, M type stuff and... and... and it's you know, one of the things that I do, I'm gonna have to stop here in a little bit, but I do want to spend a little... a little bit of time.

--- Deficiencies ---

SCOTT

1:15:56 So we... we, you want me to our model, you know, if a technician is on site, find some deficiencies, the workflow today is the... the technician is relaying that. We have a team of estimators in the buildings, did nothing but estimate service, repairs and replacements. You have all the quick kids stuff. If that was a, that was part of the functionality for X or why was it really quick and easy way for me to get information from the field back to an estimator?

TIM

1:16:22 Okay.

SCOTT

1:16:23 They have the name plate data. They can look, you know, it... it pulls up there's. Videos. We can, we could... we could shorten the time from, hey, I found a problem to putting a quote and the customers hands, right? We wanted it to be, you know, our goal is 24 hours. We were hoping to do it same day. So we're looking for ways to expedite that process. And I, it looks like, I mean, I've attempted to get the video.

They got the voice stuff. They can we... can, we can get that. That's why I was asking about who gets alerted when a, when an efficiency comes in.

--- *Quoting* ---

SCOTT

1:16:52 Because what I want to get alerted as my service estimators did, hey, they got an, they got a backlog of the efficiencies to put a quote out to... and you get in front of the customer with the, but I do want to spend a little bit of time, one of the... the... the base that we've had internally.

--- *Quoting ends* ---

SCOTT

1:17:10 So we are... we are shifting from a product called BidTracer over to Salesforce... you know, for 100 reasons, right? Just analytics and functionality and whatever. But, you know, and... and as a, as an organization, we are... we are also shifting. So we were our old way of current way that we're changing from, is it, you know, everybody in the company had a license to our CRM. So, you know, we were tracking every 100 dollar quote that went out the door that maybe it was an operational driven quote. I'm just, I'm sorta said, hey, that's not important to me?

TIM

1:17:45 Yeah, I...

SCOTT

1:17:47 Don't I don't need, so, I'm you know, I'm not buying everybody a Salesforce license. And... and so how we, you know, how we track those sort of operational by the sales team that goes out in sales quota work. And so all those guys and gals are in Salesforce, but all the technicians in the service estimators, and, you know, we... we gotta, I gotta come up with a way to track their pipeline of business. It's sort of maybe outside them having a license to Salesforce. Yeah. So you said that this would backseat into Salesforce. So maybe just talk a little bit about how that... how that works and what...

TIM

1:18:26 Into field. I think you're absolutely, right? You could probably manage the bulk of what you're gonna push to Salesforce. You could probably management side of service trade because you're right? We can... can, we... we have the ability to have the... the person doing the course, salesperson would be notified, but you would actually create all those quotes inside service trade. And so...

SCOTT

1:18:47 Were, you know, here we're looking at everything, every quote that's been sent out by, we can filter by person kind of gives it kind of gives the... the service operations team a way to track what they're working on. It's. Not maybe a salesperson, not... not... not a salesperson in the true sense of sale. It's an operational resource versus a sales resource.

TIM

1:19:09 That's right? Yeah, because there's two people on there. There's the I'm assigned to so you can assign a quote to like Mary Beth, right? She could be the one is assigned to all the quotes because she's personal Scott quartered out. And then the sale, we do salesperson for a couple of reasons, number one to your point to kick it over to... to CRM but they just want to say, hey show me how many times we've done quote for these people. And then I can go look at inside of survey if I want to. But... but there's something actionable. We need to do it's also for... for pay, right? I mean, one of our larger customers, they pay their salespeople based upon what... what they sell to those customers. So the end of every month that kick out a report?

SCOTT

1:19:51 Yeah, we don't and I don't think we... we do. We only pair salespeople for the things that they were involved in. So a lot of the work. And then again, as you think about the pull through business out of an account, it's... it's usually sort of operational driven activities, right? I don't you know, we're gonna larger kind of account management philosophy. So I don't want my sales team bogged down. And hey, I went out and I had 100 dollar quote for replacing a belt or whatever, you know, that's and I, we... we don't pay on time and material work that comes out of thing. So that's fine. But when you, what I am curious about is that and again, our Salesforce implementation is underway right now. So it's not fully baked out. And part of the reason is we're really just, we're... we're really going to get religious about what's the required fields, what David has to be entered, how we track the data, the markets, the customer, the owner, the, you know, there's just a lot of... lot of input for analytics standpoint. So I'm... I'm if I can manage that pipeline inside of... of service trade is fine. I mean, it looks like I can... I can kind of manage the pipeline. I can see who... who the customers who quarter, they can track this stuff. I don't need. I don't actually need the backfill it to... to the CRM because in theory, I could just, you know, match my revenue every month and this, you know, in service and that tells me what my sales were.

TIM

1:21:12 Yeah, I was just at a high level and that's a Riverside capitals, another big customer of ours. When I say customer of ours, their... their... their clients, their group of companies that they have a cost per portfolio is a big customer of ours. They have same thing. Salesforce is one of the tools that they plug into every single time they bring somebody on service trade Salesforce. And what I was gonna say if I would have you talked to them and one of the companies that are in Michigan search site and I would say talk to them, right? Because they nailed that stale. Absolutely. Now, this and they do the exact same thing that you're doing. They're spending the same thing that you want to.

SCOTT

1:21:46 Who did you say it was? Who did you say it was?

TIM

1:21:48 Or the site is the name of the it's a fire life safety company, 30 Michigan.

SCOTT

1:21:53 I know.

TIM

1:21:54 And then data, yeah.

SCOTT

1:21:56 Only because I'm yeah, I've I mean, I've... I've talked to him about potentially being on their board. So... small... small world. I know, I've talked to the CEO a couple of times and... and the guys, it Riverside. Yeah.

TIM

1:22:10 After them, I swear, they've got this thing nailed down. They... they have the machine. I mean, like that walmart believe analytics same thing they use Domo. I mean, they, they've got all wired... wired to though. So, yeah.

SCOTT

1:22:25 Interesting. Yeah, that's a... that's a good easy reference for me. So.

TIM

1:22:29 Guess what does... what does need to go the... the CEO?

SCOTT

1:22:35 Wow.

MARIBETH

1:22:36 Yeah.

TIM

1:22:38 There was, there was a bug me. Yeah.

SCOTT

1:22:43 No, it looks so, I mean mass, so I mean, the... the tools high functioning. I mean, I, again, I'm... I'm only asking kind of peripheral questions of things that I know that my team would... would ask, how do you guys if... if there? So if we wanted to go into a... probably a more robust, you know, multi our kind of presentation functionality with the... with the actual service team in Arizona? I mean, you guys... you guys doing onsite stuff? Is it all remote? How are you handling?

MARIBETH

1:23:13 Yeah. I was... I was just in Phoenix last week, so yeah, we can absolutely come on site and block out a couple of hours and... and kind of dig into to some more detail.

SCOTT

1:23:25 I'd probably, yeah, I would. Yeah, I'd like to try to get that on the calendar and then maybe in the next few weeks, you know, I gotta coordinate with the service team kind of their schedules and but in this would... this would be more of a, you know, I've got a VP of service. He's got a, you know, a handful of service managers. We've got some service admin management, you know, service desk service coordinators. I don't know who all have an invite, but it would be, you know, six, seven people probably that he would want to have in the room and kind of test drive and... and probably ask a lot tougher questions.

--- Purchase decision ---

SCOTT

1:24:00 And... and then I would, they... they would, you know, they're the, they're pretty in the weeds in terms of, you know, what they, what they're looking for and... so we want to do that. And then it would probably just in terms of making sure we get the most of the time, you know, probably give him the phone with... with Steve. You guys can probably, I'm sure have some questions upfront. I'm just kind of have some of the tactical things he runs the business. So when you... when you kinda come in, you've got a we're hitting all the... the... the high points of what he's interested in.

MARIBETH

1:24:32 Yeah. So go ahead.

SCOTT

1:24:36 Yeah, that would be, that would be next step for me is to try... to try to probably get, you... you know, get you guys in front of that team. Is they're... they're really the... the decision makers and, you know, outside of... you know... you know, they're being it's really extravagant or, you know, substantial differences in price or, you know, just some... some kind of funky over the top thing that, you know, I'm more focused on what's the enterprise, but I'm letting the... the local team and Phoenix, they're... they're the biggest.

--- Purchase decision ends ---

SCOTT

1:25:03 So our Phoenix operations is related to all of our technology tools. Phoenix is kind of, I mean, they're setting the standards and then we're rolling them out to the other companies just because they're you know, they're five times the size of any other... other business we have. So.

MARIBETH

1:25:18 So, so let's do this. How about I'll coordinate? I'll send some times over to you and then you can kind of coordinate with your team in terms of... of what's gonna

work best for you. I would say next week is probably our I'm thinking maybe the, you know, the week of the 20 eighth into the first week of... of March is doable. So maybe send you some times. I mean, when... when are you guys trying to make a transition? I guess maybe that is good.

WILLIAM

1:25:50 You...

SCOTT

1:25:51 Know, so there's this is broken up in a couple of pieces because of... because of the addition of pro core in Salesforce. You know, we've taken the most of the ERP, you know, most of the operational ERP activities are coming away. You're going away, writer by all my project teams will operate in pro core.

TIM

1:26:10 That...

SCOTT

1:26:10 All the sales organization elaborate in Salesforce. So there's really, so Bill owns the, this idea of ERP conversion, right? So that's it's... it's really become a GL account, right? That's it's a finance tool. Now, it's not an operational tool, but we're not yet. So I'm... I'm out of the other than for emotional support, general advice. I'm out of the ERP, you know, it says... it says project he's... he's got to. He has my opinions in those, my position... but he's gotta make a decision... on ERP, you know, like that. He, he's... he's you know, it was transparent that, you know, Intacct... it's a little bit by default. We have a couple of Sage companies already. So I realized and tactics and loop, you know, not the same, same, that same practice, say 300, but I feel like it's going to be an easier conversions. And then, you know, coming from coins to intact, right? That. So he's gotta make a decision. I mean, we... we... we need to be weird, I think want to be live in something... late, Q3 early Q4... which means we gotta make a decision here, you know, because I don't know what you guys think about implementation. What does that look like?

--- Implementation and ongoing support ---

MARIBETH

1:27:29 Yeah. So typically, there's a little bit of a runway from the time that you sign till the time that you start implementation. That's typically two two four weeks. And then the implementation window is about 90 to 120 days depending on, you know, the dependent. And so essentially, you'll be assigned a project manager.

--- Recurring maintenance ---

MARIBETH

1:27:53 You'll have weekly meetings with your implementation team. I'm sure. And we'll help you get your account setup as it relates to your customers, locations, assets, your recurring services, your items list, forms.

SCOTT

1:28:09 That, I mean, if someone, is that, is it all manual input? Or do we have some automation where we can pull databases and auto populate a good chunk of already, right?

--- Recurring maintenance ends ---

MARIBETH

1:28:20 Yeah.

TIM

1:28:20 I hope he's in Maine, maybe all nine automation all.

MARIBETH

1:28:24 Yeah, yeah.

SCOTT

1:28:26 I mean, just, I mean that... that 90 to 120 days. Is that really sort of workflows? How we wanted to, you know, building out the... the sort of how we want to... not customized but more, you know, in terms of how we want to on the tool, the function, is that what we see most of the time on just kind of walking through our processes and making sure we've got the workflows and... and kind of the setup and the terminology and everything.

MARIBETH

1:28:52 Yeah. So it's... it's... it's that it's also I'm training. So we obviously are not going to sell this to you and say, figure it out on your own. So there's training for technicians administrator's, office users. So, yeah, it's...

SCOTT

1:29:09 So let me ask another question that's it. And then, you know, one of the things that we, we've been really focused on it. And most of the tools we bought so far really have robust kind of learning and development modules built into them certification programs. Pro core does a phenomenal job. I know Salesforce has Salesforce university. How do you guys have? So, so after we were up and running six months from now and I bring in a new service coordinator, let's just say, yeah, do you guys have content online?

--- Implementation and ongoing support ---

SCOTT

1:29:40 They can go and kind of functional kind of like I'm a service coordinator here's. A day in the life. Here are the things you need to be able to do whether it's through video or just powerpoint or whatever manager, kind of that... that onboarding. When I onboarding new employee, I wanna make sure I have the... the right level of training upfront.

MARIBETH

1:29:55 Yeah. So, so, you know, once you guys go live, you're going to be assigned an account manager. So they're going to be kind of your main source of a main point of contact. We do have video based training. We call it a service... service trade certification. So, yes, what our recommendation is as they go through the certification, oftentimes people are using multiple screens, we suggest that they mirror what's going on in the video to kind of build some of that muscle memory. But of course, we have resources beyond that. So you have your account manager. We also have a technical account management option that... that is kind of an add on it's for more kind of in depth training and processes. And, you know, special projects and things like that. But yeah, absolutely. We... we want to ensure especially since one of your goals is to standardize across the board across the branches and the offices. Yes. So we, we've got the end, of course, we've got on our website, we have a very detailed a support site with articles. We have you'll have access to frontline support. You'll have, you know, there's multiple resources available for you? So we want to ensure you know, our success is only as good as your success. So we want to ensure that you guys are using as much as of the application as possible that everyone is trained up on the application, that you have resources. If there's any issues or questions.

--- Implementation and ongoing support ends ---

SCOTT

1:31:29 Perfect. Yeah, because I mean like in our challenge today is coins is not a very friendly support.

MARIBETH

1:31:35 My God, I'll tell you, I mean talking to the guys that conference systems yesterday and, you know, speaking with climate tech through their evaluation, it just feels like they're on an island. So.

SCOTT

1:31:47 Well, they're I know they're... they're model is the... the companies that are on their product, really build out their own internal and specialty teams and... and, you know, and so our, we're... we're in to some extent hell hostage by a handful of employees and the company that know the products working backwards. And so it's really painful. I'm not, they're bad employees, but I mean, just the concept that I only have, I have a one sme in the projects business. I want us to me in the service business anyway, if either one of those, where did you get my be really in trouble?

--- Implementation and ongoing support ---

SCOTT

1:32:17 And so one of the... the real big check boxes is, do we have an on, you know, do we have an ongoing training or certification program that is not a forensic manually? Somebody's...

MARIBETH

1:32:27 Yes, yes, yes, yes. And the other thing that I didn't mention is we do have an onsite go live support options.

--- *Pricing* ---

MARIBETH

1:32:34 So in the days that you guys are actually going live, we can come on site and assist with anything you know, as you guys are kind of have, you know, graduating from... from the implementation period?

SCOTT

1:32:47 And then, okay. And then just lab is just out of curiosity. Is it a, is it a per user? But your... your pricing model, per user, per volume, kind of what are you? Have you guys?

MARIBETH

1:33:01 So our website or our pricing is right on our website and it's a per technician fee. So we align our pricing with where you guys are making your money, which is out in the field. So administrator salespeople, you know, you can continue to add as many office people as you want and your bills never gonna go up. So yeah, it's a per technician. It is build annually, typically companies your size and with your needs are probably gonna start on the enterprise level. So it's 159 per month per tech building annually.

SCOTT

1:33:35 Okay. And then adjustments to those, we hire people that there's pro rated. This is the year kind of come through.

MARIBETH

1:33:42 Yeah. Yeah. So look, we're not here to like nickel and diming if you're at a couple of technicians or if, you know, but, you know, yes, we're going to monitor your account and as you guys grow, you know, we'll have a conversation with you and say, hey, it looks like you have added some more technicians that's awesome. If you add another office, just reach out to us and yes, we'll prorated to the end of your channel.

--- *Pricing ends* ---

SCOTT

1:34:05 Perfect. Alright. Well, shoot me over. I mean, I would... I would probably target... I know next week is really bad. Even the week of the first, I've got a couple of other things going on. So, can you give me some week of the first those first two weeks of March? Give me a few options. I'll pass it on to Steve?

--- *Purchase decision* ---

MARIBETH

Hello?

SCOTT

1:34:24 Surface later. Let him kind of coordinate, you know, him, work out and we'll work towards kind of getting you guys in for half a day or whatever to... to kind of spend some time with the team. Yeah.

MARIBETH

1:34:33 That sounds great. I can, you can coordinate with Steve and then I'll coordinate with Steve in terms prior to the meeting in terms of like what the agenda is, should be just to make sure that we're making... making the most of our time. Perfect.

--- *Purchase decision ends* ---

SCOTT

1:34:45 Awesome.

MARIBETH

1:34:46 Work for really appreciate your time. Thank you so much. If you do have any questions that come up, you know, sometimes you get off these meetings, you're like I meant to ask that. So I'll shoot you a recap email. I'll send over some times. I do have a couple of meetings this afternoon, but I'll get that to you morning at the latest.

SCOTT

1:35:05 No worries. Perfect. Thanks. Right? Thanks. Bye.

MARIBETH

1:35:09 Taken...

TIM

1:35:09 On LinkedIn with you as well. So we're just say my connection, I see your data used. And so, I didn't know, I thought you were Michigan but.

SCOTT

1:35:18 No bills and Michigan, I'm in... I'm in Houston. I just have to commute back and forth as needed. Now, it's less important. We have two offices in Texas, one in salt lake city. And so I'm I just sort of make the rounds of where I need to where I need to be. And we were, you know, it's funny we were... we were because we have five offices in Phoenix, pre pandemic. I mean, we were already using teams to do a lot of stuff. So we were, we... we use teams for all of our video conferencing. So we were already, you're way ahead of the curve. I didn't want people traveling, you know, across the city for a meeting. So since the pandemic and remote work, I mean, we... we just, I spend a lot of times on teams meeting.

TIM

1:35:57 I know the drill man.

                              SCOTT

1:35:59 Yeah.

                               TIM

1:36:00 Me yesterday, so.

                              SCOTT

1:36:02 Alright, awesome. I'll be in touch.

                            MARIBETH

1:36:04 Okay. Thanks so much.

                              SCOTT

1:36:06 You too. Bye bye.

                          The End