



ServiceTrade Demo with Mark-Three Construction

Dan Waggoner with Mark III Construction
Recorded on 2/21/23 via Zoom, 1 hour 8 min.

Participants

SERVICE TRADE

Dan Waggoner
Territory Manager

Katie Mullen
Field Manager

MARK III CONSTRUCTION

Andrew Forster
DIRECTOR OF SERVICE SALES

OTHER

19162211409

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Transcript

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19162211409

0:00 Hey, Dan, how are you doing?

DAN

0:01 Good.

19162211409

0:02 How are you? Doing well. Unfortunately, for some reason, my computer's web Cam isn't working. I'm gonna have to do it from my phone and I'll watch it from my computer here. Yeah, the audio and stuff isn't working. I'll have to talk to my it guy after this.

DAN

0:24 Yeah. Do you, have you're not using apple air pods? Are you by chance?

19162211409

0:30 I am.

DAN

0:31 I, so I've been, I used those for two years previously and I dropped them while I washed them, send them through the wash and the, I got the new pair and it's supposed to be the exact same type but it does not connect to my computer, like I can listen to music through my computer, but anytime I try to use it as a microphone, were headset, it doesn't work at all and I've done all the troubleshooting so that might have something to do with it. Man. It is, I was, yeah, I spent hours trying to figure it out and I couldn't so now I've got as you can see, not apple air pods.

19162211409

1:08 Yeah, it's not very fun. I wonder if I'm gonna have to go that route to make them go apple with us here.

DAN

1:17 Yeah, that's the other thing. I guess I didn't ask that part but I assumed you weren't on a Mac or something. Yeah.

19162211409

1:24 Unfortunately, not being a lot easier just to use one system.

DAN

1:31 Wood. Well, I've got Katie here with me as well. Katie is actually the field rep in California, so I thought it'd be good to have her on the call. She's our boots on the ground close by to where you guys are.

KATIE

1:45 Yeah, no.

19162211409

1:46 Nice. How are you doing?

KATIE

1:48 Yeah. Where exactly are you guys? Sacramento? Okay? I'm in southern California, but come up to the bay area quite a bit. I went to school up in San Francisco. So next time I'm up there, maybe we can actually shake hands and meet in person.

19162211409

2:09 Yeah, that be awesome. And you could put a face to the name. I usually have my name on, but I don't like not having it on. Unfortunately, so it kinda bugs me a little bit.

DAN

2:23 Appreciate that because a lot of folks, they don't even think about trying to get it to work.

--- Purchase decision ---

DAN

2:27 So I appreciate you saying that we'll look forward to seeing your friendly face sometime soon. Let's see. Were you planning on, was it just you today, Andrew?

19162211409

2:39 Yeah, it's just me today.

DAN

2:41 Okay. Cool. Well, I know. I think you had mentioned basically you guys were actually looking into different options for software. Was that right?

--- Purchase decision ends ---

19162211409

2:54 That's correct. So we've been little introduction about me. I'm the director of sales for M3 service. We're actually can, we did change our name going into this year for 2023. So Mark three Construction is basically our umbrella company. We are now a subsidiary company under Mark three. So Mark three Construction has now broken off into M3 service mep components.

--- Type of work ---

19162211409

3:23 And then there's also mep Construction with Mark three Construction being our parent company at this point. So now we are looking at software options for our division independently? Perfect? Okay?

DAN

3:37 Okay. And so as the sounds like you're heading up the service and sales, I'm guessing you'd be looking for something that specifically helps with service and tracking maintenance contracts, that type of thing?

--- Type of work ends ---

19162211409

3:51 Yeah, that and estimating too. Okay.

DAN

3:54 So I know you guys use Northboundary on some of the estimating, what is there a certain situations where you feel like that? Just, is it the right tool for you?

19162211409

4:07 I don't think we ever like Northboundary is a great platform. And when I came on board, I've been here for three years now and I've never seen when I started working here. I know everybody used it and there's templates in the portal and everything on there for Northboundary. But I don't think we've been using it out of all honesty to it's full potential and it doesn't seem like there was... much customer support from what I saw from it. The kind of the keys for me is I would be, how much customer support are we going to actually get with what we move onto?

--- Type of work ---

19162211409

4:44 Is their training to it? Just all those big questions around it, right? Because I feel like it's a great program from what I've seen, but I haven't seen a great support side to it to be honest. Gotcha. Okay?

DAN

4:59 Okay. And so, so as far as like your division now breaking off from that, what's your bread and butter for the M3 service component? Is that service agreements, recurring services more reactive or?

5:17 So, we're doing, we have, I have a special projects division under the service umbrella that does hvac retrofit. We have electrical, we have plumbing, and of course, we have hvac maintenance and that's where a lot of our PMS come from the hvac maintenance piece. And then the electrical team has been doing Eb charging station projects and then also service calls. So we're doing a lot of service work that's our bread and butter, right? And our reoccurring revenue business. But we also do projects as well. Okay?

DAN

5:49 Gotcha. And you mentioned that the hvac maintenance is sometimes where some of those pains come from anything, you know, at the forefront of those.

19162211409

6:00 Tracking for sure. The preventative maintenance agreements. It's been a pain to track. I mean, we've used an excel sheet since I've been here to actually track those maintenance agreements because unfortunately, our system doesn't do a great job of keeping the agreements in alignment. So, what happens is we use Sage, so we use Sage and service management through Sage.

--- Accounting integrations ---

19162211409

6:24 And what happens is sometimes those agreements drop off. I don't know why I think it's the program itself. It is old too, which I think is also part of the issue and they don't do any updates. Again, there's no support for that. And I know there's like Sage intact now, which is the new software version of it, but we're on older stuff, Sage 300.

--- Accounting integrations ends ---

19162211409

6:47 So it's not, I don't think that's why we're trying to move away from a lot of this stuff. Okay? Move into the future, right?

DAN

6:55 Yeah. And you said when, so the agreements kind of the drop off, how do you mean?

19162211409

7:03 Yeah. So like I'll put an agreement in the system, right?

--- Paper process ---

19162211409

7:06 And I'll schedule it out quarterly in our system. And all of a sudden, it just stops scheduling it. So then I get a call from a customer or dispatched us or somebody in our office here catches that we didn't do a service and we got to go in there and cut a work order manually because how that works in the system is they usually generate automatically, but sometimes whatever happens if a box than getting checked in the system or the system itself wants to act funky with that agreement, it drops it off.

DAN

7:38 Gotcha. Okay. And is that, does that cause any, you know, issues as far as the customer satisfaction goes or?

19162211409

7:49 Yeah. Yeah. It's always a bad luck when you get a call from a customer that you haven't been out to their site in a month when they had a PM do?

DAN

7:57 Gotcha. Okay. So definitely wanna kinda not have to worry about. That. Sounds like?

19162211409

8:04 Yeah, especially with the volume, we do too. We definitely, we need something more streamlined that's for sure. And that's kinda why we have the checks and balances with an excel sheet too. And, you know, excel is not practical either.

--- Paper process ends ---

DAN

8:19 Yeah, excel, fun little tool if you're good at it, but I've heard some nightmares on it too, you know, something getting erased or, you know, misplaced mistyped, and it can get a little massy in there.

19162211409

8:35 Yeah, especially when I on the one drive too.

DAN

8:40 Yeah, absolutely. Is that pretty much a company wide?

--- Type of work ---

19162211409

8:45 Our division. So we have certain company one one drive we use for different things, but we have our own for service, we have our team use, okay?

DAN

8:59 And how many you said you guys doing a lot of volume? How many technicians do you have doing field work...

19162211409

9:08 Let's...

KATIE

9:09 Yeah.

19162211409

9:10 I'm gonna guess something right now because we've been hiring a good amount lately. We have about 30 between all trades.

DAN

9:18 Gotcha. And would you say that breaks down to 50 50 of, for a special product? And yeah.

19162211409

9:27 Special project?

DAN

9:27 And versus baton it or zero?

19162211409

9:32 That doesn't even count my special projects team, special projects right now have six on that side of things. What we'll do is we'll borrow manpower from service to support that?

--- *Deficiencies* ---

DAN

9:44 Gotcha. Gotcha. Perfect.

DAN

9:51 And you mentioned something you were interested in was estimating earlier? How are you guys currently doing that? When a technician finds a issue in the field from one of those PMS that you've gone out to execute on, they find a repair opportunity or an issue with equipment that needs to be quoted to the customer. Can you walk me through what that process looks like?

--- *Deficiencies ends* ---

19162211409

10:13 That's the big pain in the ass part. So for hvac... I have multiple quoting sheets I use based off the customer and that's kind of where the Northboundary comes in to where I'm not a big fan of it from the support side of things because I would love to work with a company that I can just upload what I need in there because each customer I have different contractual rates with on the hvac side.

--- Tech time tracking ---

19162211409

10:41 So there's a lot more depth to it to walking through it is if I get a quote from my technician, it gets uploaded into tech tool. We pull that quote out of tech tool. And then I don't even use Northboundary for hvac. I actually have a bunch of excel sheets that calculate everything for me for depending on the customer.

--- Tech time tracking ends ---

19162211409

11:02 So I open up that excel sheet, I slap it and the proposal that customer likes to see and send it off to them. Now with electrical, it's a lot more simple. Electrical and plumbing are a lot more simple. Electrical is all through Northboundary. So it's kinda the same thing. Quote gets uploaded. Tech tool gets pulled out, gets put in Northboundary proposal gets made, sent off to the customer. And then same thing with plumbing has a little bit of that issue like HP does because there's some national accounts there too, but luckily, there's only one excel sheet for plumbing. So that's the process we currently run right now.

DAN

11:43 Gotcha. Gotcha. Glad that you're still on the one excel there on the plumbing and well.

19162211409

11:49 Said you... did.

DAN

11:53 So the, you said tech tool, is that an actual system named tech tool? Or are you just kinda referencing what the tech are using?

19162211409

12:03 Yeah, tech tool is, what did they call it? It's now... or what it was before? Yeah.

--- Deficiencies ---

DAN

12:12 So that's different than Sage service manager, right?

19162211409

12:17 Correct. So prix is a platform that's for the technicians in the field. It's something where they can upload pictures, put their notes and that communicates to service manager and Sage. So prix gives us the ability to see the notes and kind of the quotes that could put into the system. The thing is we still have to log into obrix to pull their attachments out of it. So the only thing that communicates between Sage service manager and prix is the notes piece of it. So if the tech writes notes in prix only, that gets transferred over to service manager.

--- *Deficiencies ends* ---

DAN

13:00 Okay. Gotcha. So when they are documenting those repairs and generating a quote that's something you have to kinda go in there and pull and then do the attachments come over to service manager, but you're doing quotes... through Sage. Sorry, you may have said already, I'm just making sure I got it, right?

--- *Access to information* ---

19162211409

13:20 No, sorry. It's confusing because we use so many systems. So the only thing that comes through stage is notes none of the attachments do. So we actually have to log into our accountant, our admin account through a web browser on brick to pull the attachments out. So I'll pull the attachments out for the quotes on the jobs that way.

--- *Paper process* ---

19162211409

13:38 And we have a whip and that whip is a living excel document on the one drive too. So as you can see a lot of double work, a lot of places, we got to go to a lot of things to keep track of a lot of human error involved too.

--- *Customer engagement* ---

DAN

13:57 Gotcha. Okay. Well, that's definitely, you know, in service trades wheelhouse, I'm looking forward to. So show you our process for that as far as reporting those repair opportunities, generating quotes with the attachments, getting it in front of the customer, easy approval, converting that into a work order that can be dispatched.

--- *Customer engagement ends* ---

DAN

14:16 So we'll walkthrough all of that. Do you have any, do you have any business agendas or goals as far as now that you guys are kind of branching out, setting the divisions up? It sounds like with their own leadership. Do you have any specific targets this year for your division?

--- Paper process ---

19162211409

14:37 Yeah, definitely. Do you know we got our revenue margin targets, of course, all the time. But also one thing is streamlining our processes to be able to meet those goals. I feel like that's a huge key is eliminating waste if we can eliminate waste. And possibly, I don't wanna say trim down overhead. I think that's a bad way to put it. But I think if you eliminate a lot of these processes and you can streamline it with software, it kills a lot of those redundancies to make people in the office more efficient, which I think makes a positive impact on your overhead because now you have people that can focus their efforts in other areas that are gonna make the company more profitable... absolutely.

--- Customer engagement ---

DAN

15:21 Yeah. Take some of those redundancies away, allow people to focus on those revenue generating activities and make those activities easier to accomplish. It sounds like it would be useful and it's kind of what you're looking for.

19162211409

15:37 Yeah, that's definitely our aim. I would love to have a system that one spot.

--- Paper process ---

19162211409

15:42 I want to be able to do everything in one spot for the day to day activities. I know that, you know, unfortunately, you'll never get something that has payroll and everything in it. And it's a, that's a big reach. I understand that piece of it, but I want to be able to have a system that is going to be able to do all the day to day process and make it easy for, from dispatch to estimating to the technicians in the field. It all needs to work together. Yes. Well.

--- Customer engagement ---

DAN

16:10 That's as far as I mean, we're not all in one by any means like you said, payroll, things like that, you're gonna need your accounting system, but really that's what our system is designed to do is take the customer service part of it, right? And the service activities, things that affect your customers affect your revenue and get that all under one umbrella, give you full visibility on it, know where your opportunities are with your customers, make sure nothing's fallen through the cracks and make sure that your service team is able to communicate, you know, in real time to get to accomplish what they need to day in and day out.

--- Implementation and ongoing support ---

DAN

16:45 So, excellent. Yeah, I think that there were you're gonna like what we have here. And it sounds like another thing that, you know, you'd set a couple of times with support moving forward, you wanna make sure that you're well supported by the partner that you choose to help you with these, you?

--- Implementation and ongoing support ends ---

19162211409

17:00 It, hey, Dan. Sorry about that. Give me one second here. Sure. I apologize for that. I had an employee just come in. She wasn't feeling good. Sorry about that. Sorry to interrupt. So go ahead.

DAN

17:20 No, I was just kinda recapping some of what we talked about there. But as far as that, you know... do you feel like you'll reach your goal as far as the revenue targets that are in front of you right now with the way your processes are?

--- Purchase decision ---

KATIE

17:37 I...

19162211409

17:37 I think... I'm gonna say yes because I'm a very optimistic person but I think it's going to be very tough to do it with the current system that we have. Right now. I feel that if we had something more streamlined, it would make the process easier for a lot of people here. And that's where the value benefit of it comes into. I mean, I've I'll just give you a background. When I started here, I would tell my boss all the time and we need software flat out it, we need something that's going to be able to be better for our customers, better for us.

--- Purchase decision ends ---

19162211409

18:11 It's gonna increase our response time, our effectiveness, everything that we need in order to operate successfully as we grow to a large company. And I'll never forget this too because the CEO at word that I said that and he came down the next week and he said, why do you need it? Why can't you do everything in excel? And so now, luckily, three years later we're here and he okayed it last year. And so now we're pushing for it that's awesome. So he's...

KATIE

18:40 Already...

DAN

18:40 Signed...

KATIE

18:41 Off on this, yeah.

DAN

18:45 Excellent. So would you be the main, you know, the person that would sign the agreement here?

--- Purchase decision ---

DAN

18:52 You know, as far as moving forward or would there be anyone else on your team that we would need to get impressed, get in front of service, trade, that kind of thing?

19162211409

19:01 My boss would. So I'm doing all the, basically the preliminary and then I'm going from there afterwards. Kinda that way I can just present it to them and then we can have a follow up meeting to kind of a general overview. Okay?

DAN

19:16 So you would anticipate he would be involved in that follow up meeting after your conversation?

19162211409

19:22 Correct.

DAN

19:24 Okay... perfect. Well, is there anything that, you know, either I miss that you want to point out that's important to you or also, you know, considering your boss, we'll be involved with this?

--- Purchase decision ends ---

DAN

19:37 Is there anything that you think they would like to that they would be interested in focusing on? If they were here?

19162211409

19:46 Billing, I think kind of the key points is billing the whip, estimating. What else did I go over there to the field side of things? What does it look like for the field?

--- Purchase decision ---

19162211409

20:03 And I don't think I'm missing anything else on my list here? Kinda just giving you the general overview of points to hit. Okay?

DAN

20:14 Awesome. Well, Katie, did you have anything?

KATIE

20:18 Yeah. I just, you know, I was wondering and I don't know if you guys have already discussed this, but if it's something that he kind of approved last year, have you guys been evaluating anybody else?

19162211409

20:32 Yeah, we have.

KATIE

20:34 Okay. Do you feel comfortable sharing? Who else you're looking at?

19162211409

20:39 We've been looking at BuildOps?

KATIE

20:42 Okay. And are you guys pretty far down the line with them or have you guys seen demos or are you kind of at the same place with us as them?

19162211409

20:52 Demos with them? So we're pretty far down the line with them currently right now.

KATIE

20:57 Okay. Yeah, that's good for us to know. I think that that's pretty much the other question that I had. Dan, if you wanna hop into any of the, anything that you had planned then I'm sure.

DAN

21:15 Things.

KATIE

21:15 Will pop up as we go.

DAN

21:18 Absolutely well, out of curiosity that brought one last thing to my mind. Andrew you guys seen a couple of demos with BuildOps. Was there anything that you'd like

specifically or also considering you haven't moved forward yet? Was there anything you felt was missing that just wasn't quite right?

--- Purchase decision ends ---

19162211409

21:39 Estimating? I haven't seen too much on the estimating piece for it. That's one thing I have still a lot of questions on is for me and my standpoint of it and the CRM piece too. They don't really have a CRM piece to it, but the, I would say they have great reporting capabilities that can pull KPI and be able to get a lot of that information.

--- Accounting integrations ---

19162211409

22:03 So, I think... it's always tough though, right? Because it's how do you use those reports? And compared to a CRM that's a little more forward facing and you can pull what you need out of it, compare to creating your own reports? I think that's I think it's a positive and a negative having that in depth of a reporting system because sometimes you could be pulling too much information versus not enough, right?

--- Accounting integrations ends ---

19162211409

22:32 Or actually getting the right information that you need for those reports and KPI'S so I think that's another key thing to be mindful of when we look at things like that. Okay?

DAN

22:44 You feel like the reporting is good, but maybe it's not built out in a way that it could be useful.

--- Purchase decision ---

19162211409

22:52 Yeah, I think it's because it's very customizable and I think that's where it comes into putting in all that late work to get it customized to fit our needs, right? Okay. Yeah, that makes.

DAN

23:05 Sense. It makes sense. Okay. Well, I'm gonna share my screen here, Andrew, if you're ready and we'll jump into the demo here. And like Katie said, obviously we'll keep this like a conversation. So feel free to, you know, interrupt me or Katie throughout and ask questions.

19162211409

23:24 Perfect.

DAN

23:28 Right. So I'm on one monitor today, so I'm just gonna make sure I am sharing this with you guys and you guys can see my.

19162211409

23:37 Yeah, excellent. So now does Northboundary integrate with you guys a service trade?

DAN

23:49 That's correct. Yep. So I think something and that's I'm glad you brought that up something I was thinking of sort of towards the beginning of our conversation there. I think you would benefit from looking at a little bit of the, some training resources possibly or video overviews on how Northboundary works because based on what you're telling me, it sounds like you guys are a great fit for what Northboundary provides, right?

--- Recurring maintenance ---

DAN

24:13 And so I think you could really use that tool specifically with your special projects and your perspective customers. And then what you would do, you know, once you've run one, that maintenance agreement, push that agreement into service trade, generate that customer with all of its equipment, all of the service dates and needs the contract, the terms and conditions, and then execute on that agreement with service trade in its entirety.

--- Purchase decision ---

DAN

24:40 So you wouldn't have to go back outside of service trade for quoting or anything like that. And we'll take a look at what that process looks like. But that's a pretty long answer to your question.

19162211409

24:52 No, that's perfect. Definitely answered what I was looking for... awesome.

DAN

24:57 Well, Andrew, a little bit about us as you consider partnering with us, I think it's important to share, you know, a little bit about us but we'll jump right into the real deal here.

--- Type of work ---

DAN

25:07 In a moment. We do work specifically with commercial service contractors. So we don't work with any residential folks or your business is our entire mindset, right? So that's where our platform is going to be developing and has been working with for the last 12 years. So here's some folks that you might recognize.

--- *Customer engagement* ---

DAN

25:29 And the start of that is going to be your operational efficiency. As far as how we help our customers, right? We get all of your resources, all of your service activity onto one platform to where you can deliver service estimates, quotes, get paid schedule dispatch and everyone's got full visit on what each other are doing. So operational efficiency is sort of the front of things, but really how we help our customers the most, it would help them grow their business by helping them stand out to their customers. So providing premium service and making it easy to do business with you. So a couple of ways that they're doing that.

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

DAN

26:08 And this is an example of a proposal really simple in service trade to generate a quote based on the information collected by a tech fixtures attachments, everything built in for you or included for you from that report, get it straight in front of the customer with a one click approval process.

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

DAN

26:26 And that's going to be customer based pricing, right? You can set up those different service agreements and contract pricing rules to make sure they're getting charged and quoted the right amount.

DAN

26:40 So really the process, right? Looks like this, you've got the service ticket, finds an issue efficiency is what we're gonna call it in service trade records it on the mobile application, get the quote to the customer approval, get another service ticket out there.

--- *Customer engagement* ---

DAN

26:56 And we allow you to do that. All under service trades are very easy to accomplish those revenue generating activities. So we actually studied a 1,000,000 quotes over 2021 and 2022 from all commercial service contractors quote and service trade. And what we found was that pretty much between our bottom half and top half performing customers. And that's relative to their growth performance. The quote approval rate was very similar which is interesting. But what we found as far as why the top performers are growing more is the work orders with identified equipment issues. So they're reporting a lot more opportunity to be quoted out. And

then you look at identified issues, converted to quotes, top performers at 60 percent, bottom performers, around 10 percent.

DAN

27:58 So the point of those statistics really is that service trade is going to make it really easy to document repair opportunities, really easy to convert it to a quote and get it in front of your customer, generating more opportunity for that repair revenue, which obviously higher margin, higher Mark ups for you guys... and keep your customers equipment up and running... the other side of service trade and go ahead Andrew.

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

19162211409

28:25 I was gonna say now does, would that give the basically, it would give the ability to text in the field to pull like pull through, they could send it to our customers right there on site, right? It could that's not always how.

KATIE

28:41 Our customers...

DAN

28:41 Are doing it, but that's a possibility. Would you prefer that or do you like the office to have eyes on things?

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

19162211409

28:50 I like both ways. I like our tech to have the ability because sometimes what happens is our customers want, we have what's called NTS not to exceed on site with certain commercial vendors and a lot of the time instead of our tech getting the pricing to them, I guess send a quote to the office. And then there's that I feel like in my opinion, it's a little more inefficient to compare to. We could have the tech to the quote on site cuts down some of that office time, especially if it's like a contact or a relay or something small. And then it can just go to the customer and they approve it then and we can fix it that day and capture that. Now bigger stuff of course, that needs to go to the office, motors, anything that has to get tracked down little stuff though. I think it's important if you can have it forward facing you.

DAN

29:40 Yeah.

19162211409

29:41 Absolutely.

DAN

29:41 So, yeah, you could enable that for the text and you could just put a note per customer location basically probably be part of your agreement, right?

--- Deficiencies ---

DAN

29:49 So just have that note on the location where every work order generated there would have that NT E amount. So if the tech was able to see that, say, hey, this is gonna fall under that. I know to go ahead and present this to the customer right here and see if I can make it happen.

--- Customer engagement ---

DAN

30:07 Perfect. All right. And really another way that we differ from a lot of platforms out there on providers is the way that.

KATIE

30:18 That we.

DAN

30:18 Value the engagement with your customers and showing them the good work that you're doing, right? Allowing you to present your brand to them multiple ways throughout the service cycle. So, this is an example of a service link that's a real time service report, any files, attachments, alerts are going to be included there for your customer. It's available 24 seven to them. And the service portal is a way that they can access all previous jobs, history invoices, quotes, they can request service from, you, see upcoming appointments, but really just making it easy to access your services, easy to get the information that they need. The same way that you're you know, looking to centralize the service activity and centralize the information. You have customers really appreciate that as well. And so that, that's a great way to, you know, show that you're the best provider in the area, show them the value of doing business with you and keep your best customers and attract new prospects.

--- Customer engagement ends ---

19162211409

31:17 Do you see a lot of your current users using this now? Because I feel like it's I feel like that one's a tough sell. But correct me if I'm wrong. Have you seen a lot of people using that piece of it, the portal piece? Yeah?

DAN

31:35 Yeah, absolutely. A lot of our customers use it as a way to actually... so, for their maintenance agreement, customers, right?

--- Customer engagement ---

DAN

31:44 So hey, if you sign an agreement with us, we will give you access to the portal where all of your information lives, right? And you'll be able to access it all the time, request service from us 24 seven, that type of thing.

--- *Customer engagement ends* ---

DAN

31:56 But I think I probably get where you're going. So some customers are not used to that type of thing. And they could be hard to sort of show them the show them, lead them to the water, if you will.

19162211409

32:10 Yeah. What percentage of your users do you think actually use that piece just out of curiosity?

--- *Customer engagement* ---

DAN

32:18 That's a great question. Honestly... of our premium account users, where the portal is included with the premium account. I would say, I'd be surprised if it wasn't close to all of them. As far as their customers on the back end, how many of their customers are accessing the portal?

--- *Paper process* ---

DAN

32:41 That's a great question. I think that, that's really what a lot of customers are looking for nowadays. As far as online accessibility, you know, it's a big thing. So, I would think that number is very high, but there are of course, those old school folks who takes a little bit of time for them to get used to it, but, you know, that's the direction that most businesses going.

--- *Customer engagement* ---

KATIE

33:04 Yeah. I was actually gonna say exactly that. I've seen a lot of customers to like at the end of the year. If one of their customers is getting audited, it's a really easy way for them to just go in and have all of that information rather than having to call the office and say, hey, can you send me a list of all of the, you know, different jobs that you've done for us over the last, you know, year, two years, three years, whatever it may be. So, I think the portal is something that maybe they're not using, you know, on a monthly or even quarterly basis. But I do think that it's important to have that information there and take some stress off the back office on your guys end.

19162211409

33:45 Definitely. And does your guys portal give the customer the ability to, maybe they have a new, I don't know, let's say, what am I? What am I trying to say? They have a new request for information they wanna see at the end of the call? Maybe they have their own documents, their own paperwork. Does that portal give the customer the ability to say, hey, can you guys start attaching this to work orders?

--- Forms ---

19162211409

34:13 Or is that something that we'd have to go in and put in there for them? I'm just trying to see how much customization there is there. Yeah. So, for...

DAN

34:22 That basically, you could take that form, upload it to the customer's account and then set a rule where every single job, that form would be included, right?

--- Forms ends ---

DAN

34:33 And then set that up in the work order generation for that, that's part of the steps for the tech to complete. Hey, this form needs to be included when you close this work order out and it would be available for them. What kind of forms are those typically?

--- Forms ---

19162211409

34:48 So, sometimes it'll just be like a checklist form or sign off sheet that has their company letter heading on it. Okay?

DAN

34:56 Sure. Yeah. So we could help you set those up. The easiest way to do that would be yes to set it up under the customer. And so that every time a customer tech went out to that job site, that form would be available for them to pull as a PDF and then fill out any check boxes. We can also set it up to where it could pre fill some information like job number, location, technician, onsite, anything redundant that you already know. So they're just going through and checking off updates.

19162211409

35:25 Does the portal also allow the customer any ability to request service? It does... that's pretty cool too. And how does that get translated out, I guess to my team? Yes.

--- Dispatch ---

DAN

35:42 So you'll get a notification email. It's also gonna show up on your dashboard, so that's and the dashboard is the first page when you log in, depending on how the customer requested, it may show up as essentially immediately overdue, right? If they said as soon as possible. Obviously, you can adjust that once you get it because you know they requested it midnight and you get there at nine am, it's not necessarily overdue but, you know, it's a priority but yeah, it'll show up in various ways throughout your service trade account.

--- Dispatch ends ---

DAN

36:08 So that to make sure it's not missed or slipping through the cracks and your team would, you know, act on it.

19162211409

36:18 Great. I like that.

DAN

36:22 You think that requesting service from the portal like that would be, it sounds like it would be helpful for your team and you think for your customers as well, they'd appreciate that.

--- Paper process ---

19162211409

36:33 I do, I think the one thing I struggle with is we work with a lot of large corporations. The one thing I'm trying to wrap my head around because that's why I asked you, how many of your customers do you think you use it? I would like to get the, some of the large larger customers we work with to go from their portal to ours and just take their information and put it there because I feel like there's so many times to wear, they're calling us or they're emailing us, but we put it in their portal and they just don't look and I feel like if there's a, in their portal stuck, I'll be really honest. Their portals are from what I saw on that previous page that you guys had. It's a lot easier to read. Their portals on the other hand are just terrible looking like you got, you gotta click like eight different spots just to find a call on some of their portals.

--- Paper process ends ---

19162211409

37:24 And it's just like you're looking at it and, you know, like why the hell do you guys even go go to this route, you know?

DAN

37:30 Yeah. Well, let's start there. Actually. Let me open up a live portion of the portal here.

DAN

37:43 Yeah. I think that's great that you're trying to, you know, or that you would have the idea to move them over from one of those portals to your own.

--- *Type of work* ---

DAN

37:51 Is... are you working with, is any of your work? I guess coming through things like service channel, that type of thing?

19162211409

38:01 Yep. Okay.

DAN

38:04 What percentage of your customers would you say are run through service channel?

19162211409

38:12 Not too much. I'd say probably like 15 percent. Okay.

DAN

38:16 Excellent. And those are the customers I'm guessing that you're mostly talking about with these forms and portals?

19162211409

38:24 Yeah. And that's the selling point, right? Is selling these customers to change over to that? That's my ideal?

DAN

38:34 Well, and with a system like this, right? You'd be able to show them sort of the value that they might have been looking for when they signed up for service channel, but that they can get from you as a vendor that can take care of their plumbing, hvac electrical and really all of their service needs for their facility.

--- *Customer engagement* ---

19162211409

38:53 Yeah, that would be ideal.

DAN

38:57 But this is the customer facing side here of the portal, right? So they're looking at, they log in, they see their services overview and you'd set this up to where they see the locations and information that you want them to see when they log in.

DAN

39:10 So for me, I've got maybe I'm managing, you know, 15, 20 different locations... top golf, if I wanna take a look at a specific building, let me get another one here. Let's try our top golf in San Jose. I know I've got some jobs there... so they can see today's.

--- Dispatch ---

DAN

39:30 Jobs. We've got a job at four PM that's actually the one I've scheduled for our demo here and any other upcoming jobs that are completed recently, the invoices for those jobs, they can click in directly here and take a look at their service details. And like you mentioned with files, this is a great one to pull up because I've specifically got a file here with the companies stamp on it.

--- Dispatch ends ---

DAN

39:53 Got a little bit of pinmanship on there, but this is an example of what their file would look like attached to that service work.

--- Forms ---

DAN

40:09 Can see some of the information was pre filled here and it looks like I didn't add anything additional but check boxes and any other adjustments that the tech made and show up there as well.

19162211409

40:24 That's nice... it can.

DAN

40:28 So take a look and drill down here. And this is where they would be requesting service.

--- Assets ---

DAN

40:31 So look at their specific assets as well as deficiencies and quotes. So anything that a proposal or pair that you've recommended recently for any of their locations? Obviously, they can drill down if they'd like, but there's one stop shop for them to find how all their equipment is operating, and any recommendations that might need to be attended to.

19162211409

40:52 Now, can they approve quotes from that portal to?

DAN

40:58 They can, yep... let me go back over here to one of our quote. So here's our quote for... compress replacement, open up the quote. It's where they check off your terms and conditions, go ahead.

19162211409

41:18 Now, if I was let's say onboard a customer?

--- Implementation and ongoing support ---

19162211409

41:21 Sorry, I'm asking you guys so many questions if I was onboard a customer and they were to use this side of things, do you guys provide any training for that? Or is there a video you guys have? I could shoot you a customer. What does that support look like? Because, you know, there are those questions. I'm sure will come up. Yeah, absolutely.

DAN

41:42 No, that's a great question. And I'm sure that we do have a video. So we, we'll train you on what the portal offers, right? And how to use it on your side, which should give you a really good idea of sort of how to explain to your customers how you want them to use it as far as us providing a video that's specifically tailored for your clients to take a look at.

--- Implementation and ongoing support ends ---

DAN

42:05 I'm not sure about that, but I think probably some of the information on our website or I think there's probably something floating around like that. If there's no, that's a great question. I would love to have something like that. So, yeah, that could definitely be provided to help them understand what they're going to be getting out of it.

19162211409

42:25 Be great if you guys had something like that, be easier to honestly sell to a customer too. Okay?

DAN

42:34 Yeah, I'll jot that down. I think that's definitely something we can provide. Well, I wanna take us back a little bit here. We're gonna leave the portal. We're gonna go to your side of things, right?

DAN

42:44 The service trade, office view, if you will. This is the web application where you'd be doing most of your work from the office computer. Anywhere you've got internet service trade is a true internet application. So you can log in anywhere that you're online. And I wanted to start with a customer contract, right?

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

DAN

43:04 So this is a service agreement in service trade. Now, this is the agreement that's valid with this customer through 2025 you can see here our invoice revenue to date or expected margin or actual margin and all the performance metrics on this agreement since it was impact. So basically what you'd be doing is once you've won an agreement with the customer and sign them on, you'd just be getting that information from Northboundary to service trade... open up your service agreement.

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

DAN

43:39 Now, this has the reason I wanted to start here. One of the reasons at least is that you mentioned different customers have different Mark up rules. They have different terms and conditions that they're expecting. So you can have multiple terms and conditions, right?

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

DAN

43:51 For different customers. So this agreement, when it is assigned to the customer account and locations, it's going to predict all the terms and conditions for their quotes for their invoices, the contract rules for the payment terms, net 30 the Mark ups. So every time that you interact with that customer, everything is based on the agreement that they're under.

--- *Recurring maintenance* ---

DAN

44:19 Any questions about that, Andrew?

19162211409

44:22 Is there a... equipment list?

DAN

44:28 Is, yep. So that was my next steps. I appreciate it. So let's say we're moving now to the customer's account, right? That's the agreement, the service agreement that

you have, and it's for this account. Now, this account, you've got six locations. So we're gonna take a look at our location page. This is the physical address where you're providing service, and this is where your assets are gonna live. So all of the customers, equipment, all of the services and I have actually opened up the job page. Excuse me, the job will also have the assets on it. But in this case, I wanted to show you the location. So your customer's account page here... all of your services, whether recurring or one time services show up right here, the jobs you've completed in the past, but their equipment, they just ask about this is all the different equipment that you work on for the customer... any previous deficiencies.

--- Deficiencies ---

DAN

45:26 So those are those repair opportunities that have been recorded and quotes and the status of those quotes, and of course, the contract they're currently under. And then these are the location based comments, right? So things like we mentioned, we have the NT E amount label a comment on that location on the account as a whole.

--- Assets ---

DAN

45:46 And that will show up on every work order for the technician... different types of attachments as well. So everything you need to know about this customer is on the one page here. Anytime anyone at your company needs to track or look back at anything, generate information for this customer work orders, dispatch, they can always go to this page, find anything that they need.

--- Dispatch ---

19162211409

46:15 Good like clean, it is excellent. So once you set up, yeah, go ahead. No, it's overdue. Can you click the plus sign? I wanna see what that looks like. They're service in the overdue?

DAN

46:35 I don't always get my jobs here in my demo account. Sometimes we fall a bit behind.

19162211409

46:43 I actually like seeing that a lot because I feel like that's great. So what is, can we back up a little bit? I guess what is there a dashboard function? Like if I'm a dispatcher and I want to go look at my day, right? And I wanna see what jobs I have pending out there.

--- Recurring maintenance ---

19162211409

47:00 What is that? What does that look like? Does it flag those overdue jobs? Like it did back there on that customer? That's awesome. I like that. Yeah. So once...

DAN

47:15 That's the thing with those recurring services, right? Once you've set those up or if they're just the, even if they're you know, repair one time service, if they have a due date assigned to them, then that's going to predict what you see in this bucket.

--- Dispatch ---

DAN

47:27 So, any jobs without appointments, and then jobs coming up even in two weeks, they haven't been scheduled yet. So it'll give you a heads up every day that you log in. Hey, these jobs are coming up. We got these maintenance services that are due at the end of the month. You need to get them scheduled by them.

19162211409

47:44 What about billings? Does it show billings due? Does it show quotes needed?

DAN

47:49 It does jobs to be marked complete and invoices right here, ready to be invoiced.

19162211409

47:55 Now... can you, because I have customers that roll jobs over. Basically. So what happens is we might Bill for incur, but we have to leave that specific ticket open to come back and do more work on that ticket. Still? Is that possible in your system or do you have to create a whole day ticket? Yeah.

--- Dispatch ends ---

DAN

48:16 Absolutely possible. Why don't we jump out and finish our job here because that will take us through the quoting process as well. And then we can actually build a parcel service on that ticket. So I can show you exactly what that looks like. If you'd like.

19162211409

48:29 Yeah.

DAN

48:30 Okay, perfect.

--- Access to information ---

DAN

48:33 So let me switch over. I'm gonna take the work order here and we're gonna switch over to the mobile app. You should see my iPad on the screen there... and is, are my Zoom controls blocking the iPad? Or are you guys right?

19162211409

48:48 It...

DAN

48:50 Okay. Cool. All right. So, this is what the technicians view would look like and service tray is going to be available on phones or tablets, android, or apple. So whichever you're more comfortable with.

--- *Customer engagement* ---

DAN

49:08 So, first thing I'm gonna do is the tech I'm gonna clock in is in route and notify the customer and this is a great way to again put your brand in front of the customer, give them that premium type service that folks are looking for online these days, it's gonna show up with a picture of the technician.

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

DAN

49:23 So they know who to expect when to expect them. And of course goes without saying that the office will also see when the tech started out in route. So they know, hey, Dan is where you should be and on the way to the job.

DAN

49:41 Once I show up there, I'm just gonna move over to clock in on site.

--- *Assets* ---

DAN

49:44 So we've got three different services today. Checklist for the technician... each of these services is tied to a different piece of equipment. So for the technician, they've got full visibility on the service history for each of these AC units. In this case. So specifically standing over this unit, I can see what happened to it last time, who was here last. I can also load up a full list of all of the deficiencies that we've reported, whether they've been fixed or if they're still open. And this spot where attachments files, user manual about that system, maybe a map to videos... and of course, the general specifics about the equipment, zero number, make model.

DAN

50:45 So you notice for the appointment, it's got specific assets. But also if I wanna look at all assets at this location, there are quite a few more. Maybe I come across something at the location that wasn't necessarily on our job ticket today, but it'd be nice to know what's going on with that industrial water pump, or what have you? I'm

able to pull up that equipment as well take a look at any of the information that would be relevant for me there.

DAN

51:17 Does that, is that what you're looking for as far as equipment tracking? How do you think that would... change the way you guys are looking at that sort of information currently?

19162211409

51:28 I think the big thing is that the texts are putting that equipment information in, correct? Or would that be the office capturing it and putting it in, well, it depends?

--- Paper process ---

DAN

51:38 I mean, do you guys have a, do you track assets currently?

19162211409

51:44 We do and, you know, the part of the struggle is not getting enough information from the field is the biggest thing. And I feel that this is very simple. This is a lot more simple than what we work with currently. And I think that's important for guys in the field is to have that simplicity in order to get whatever information they need. I, I'm always a little pessimistic when it comes to getting the information from the field sometimes because that is the hard part is get getting the right equipment information. So that's one thing... I internally try to figure out how do I make that or how do we make that better? How do we capture all the information we need? Is it the office putting it in getting it from the field? Or is it better to make the field do it while they're on site? That's one question I've always... yeah, you know, asked and juggle. So, does I guess, does this have the ability to put that information in the text? Are in the field? Well, it's interesting, I mean.

DAN

52:52 Think probably most.

19162211409

52:53 Folks struggle sort of with how they want to handle.

DAN

52:55 That, the great thing is, you know, add the asset one and then it's there forever.

--- Assets ---

DAN

53:00 So, one time recording that asset information from there, you're just adding to it. So some of our customers, I know that one of the folks I work with mentioned that, hey, he's willing to pay a technician double time to enter some of those, the

equipment that first go around because he understands how valuable it is to track assets this way. And for him to be able to look up, for example, you know, they have a building they've been working on for 20 years and customer been with them for 20 years for him to be able to look up across all of his customers, a specific type of AC unit that is having failures of their compressors at the age of 12, right? And look over all of his customer accounts for that specific compress model and find all of them and get quotes in front of all those customers for replacement. With the recommendation, you know, you can do that in a minute, right? Because he's tracking equipment the way that he is.

--- *Deficiencies* ---

DAN

53:53 And so, for him, he said, hey, listening guys take your time, get that information incorrectly. And I've also heard those folks that will say, hey take a few pictures of the tag and create an asset. So it's very simple to add an asset, right? I could do hvac... if I could spell... and then just add that picture to it date, right?

--- *Deficiencies ends* ---

DAN

54:20 And from that point, like you mentioned, the option is the office is going to have a picture of the tag and they can enter in the additional information there.

DAN

54:32 Like that. Yeah. So either way, really, whichever you're more comfortable with, if you did have some assets you tracked currently though, and you're able to produce an excel sheet of those, we could actually import those and load them into your account.

--- *Accounting integrations* ---

19162211409

54:48 That's great too. And what do you guys integrate with to do you guys integrate with Sage? We do have an option.

DAN

54:56 For that, yes... but service trade is an open API. So, you know, we can really integrate with anything that's willing to integrate with us.

19162211409

55:11 Okay. Yeah, because we still use Sage for our payroll piece. Gotcha. Well, I want for billing.

--- *Deficiencies* ---

DAN

55:23 I'm sorry, go ahead. Yeah, I was gonna say I wanna get to... the good stuff, right? It sounds like a lot of this looks good for you so far, but I think you really like the way that we talked about earlier as far as reporting those repair opportunities, what a technician would walkthrough and what the office would walkthrough if it does exceed that nte. So for them, it's going to be the same process every time they're gonna go to report a deficiency compressor replacement. So they just go ahead and label this now with the equipment that you're tracking. Actually that's going to be the next step. But right here in this process for them, they're going to be prompted to take a photograph. They can add notes if needed tag in a quick video as well. Obviously, this is gonna pick up anything they need to talk about. So they can walkthrough the office or the customer, exactly what's going on with the equipment. We'll stick with two attachments this time around. You can really add as many as you'd like there, the level of severity, so process.

KATIE

56:29 Is really easy.

DAN

56:30 For them to capture not only the inoperable units, right? The ones that everybody knows about and they're expecting quote, but also those suggested minor repairs. We'll Mark this one as inoperable. And this is going to bring up my equipment list. So if I start typing in the serial number up here at the top, right? It's going to drill down and find the equipment I'm looking for. So I can go ahead and tag it. And that's really it I'm gonna go ahead and Mark this as new... hit save. And we're doing this in the case currently that we're going to be sending this out from the office.

--- Deficiencies ends ---

DAN

57:05 If it were ready to be reviewed with the customer right there, the technician could basically flip the iPad around. I apply a proposal, you know, lingo to it and then have the customer sign off on it. And I've got a video walking through that process. If you'd like to take a look at that option?

--- Dispatch ---

19162211409

57:25 Yeah, I'd like to see that. And then the other thing I know we're running out of time here. I think the other question I have is for the dispatchers, the dispatch board, itself. Does that give like a Google map view? Does it give anything to where the dispatchers can see where all the locations are for the day or at least where pending calls are. So they can schedule accordingly, it?

DAN

57:52 Got a map view of all of your open jobs. Also, you can see a map where all the technicians are. So, absolutely, several different views.

19162211409

58:01 Of...

DAN

58:02 Ways to schedule, you know, everybody schedules differently. So, there's a lot of tools. It's really about learning how to utilize the system for what works best for you.

--- Dispatch ends ---

19162211409

58:19 Like that, it sends those reports LinkedIn to now, does that goes directly to the customer, right? That's...

DAN

58:26 No, this is actually internal, right? So you can set.

19162211409

58:28 And by the way... do we have what I'm sorry?

DAN

58:33 Salespeople, you do obviously. Yeah. And I guess the question is like these types of, you know, issues for the customer, would they need to get to a salesperson? Is that typically, how it goes and account manager, and they're handling it as far as quoting?

--- Implementation and ongoing support ---

19162211409

58:47 Yeah, you hit the nail on the head of an account manager.

DAN

58:51 Perfect. Perfect. So based on the customer here, you can have this routed, we're based on the type of equipment, right? Depending on how you want to set it up. You can have it routed directly to the account manager for that account.

--- Deficiencies ---

DAN

59:03 So they get this email immediately load up the efficiency. And this is in real time, right? So Dan could be out there having a smoke break on the job site. Who knows what he's up to, maybe met a cute lady that he's talking to, but we're already getting to work here in the office. We've got all the attachments... that are alongside this deficiency, the equipment information, the job it's associated with the reporter? Obviously, we've even got the deficiency history. So what else has been reported on this equipment in the path that might be relevant to my recommendation for the customer? Today? Looks like everything is in place here. So, I know earlier you'd

mentioned, you know, kind of going in and looking for some of that information in let's see tool tech. I think it was before it goes to the next level with this, right? It's immediately available and we're just gonna add it to a quote.

--- *Quote templates* ---

DAN

59:53 If I need to make any adjustments, I can... we're looking pretty good here as far as the logistics of the basic format of the quote. And at this point, what I will do is apply a quote template. So we've got a compressor replacement. I can see all of the equipment information telling me, you know, most of what I need to know the video as well. And I've got a template built out compressor replacement. You can build out as many of these templates as you'd like use them as many times as you want, wherever you want to. For example, this can be a basic compressor replacement template. But as I add this based on the customer service agreement, so the contract for the customer, the markup rules could be different.

--- *Quote templates ends* ---

DAN

1:00:37 So I can use this across all of my customers. Service trade is automatically going to make it the correct markup for that.

19162211409

1:00:47 Now, does the system have the ability just thinking here? Kind of the things I've been seeing on here, if a quote is late? Let's say, can I assign basically timeframe like I want my account managers to get quotes out within 48 hours? Can I do that in the system to where it flags in? And it says this is overdue. And then I get an email from it or how does that work? Or the capabilities there for the system on that end of things? Yeah.

DAN

1:01:16 So as far as not.

KATIE

1:01:18 Patient.

--- *Deficiencies* ---

DAN

1:01:21 Basically, the way that you do that is here, so deficiencies, you'd be able to see all of the deficiencies that have been reported and their resolution. So whether it's new, that means an account manager has not acted on it yet verified means it's been acted on. And then once it's verified, right?

--- *Quoting* ---

DAN

1:01:42 You're going to see you'll have a quote dashboard as well. So the quote will make its way through the process. And this is where I'm gonna send this out. But currently, we've got a quote and draft that's related back to that deficiency that's been verified by our account manager is now in draft really easy for you to report on that and report on all of your sales people's, productivity and who might be falling behind or not getting deficiencies quoted out soon enough.

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

DAN

1:02:09 But after I send this to the customer, I'm gonna pull up the dashboard for the quotes as well. For... so this will bring up your company contact, and then the location contacts as well. And let's see. I thought I had you in here. There. You are Andrew, you can send this to multiple customer contact if need be.

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

DAN

1:02:28 And do you have a spot where you can pull up a preview of that on your side? You should just got an email in your inbox there?

19162211409

1:02:39 Yeah, I'm waiting for it to come through. Okay?

19162211409

1:02:47 Don't haven't gotten anything on my end. Interesting. Let me check my spam folder. So I went there.

DAN

1:02:59 Yeah.

19162211409

1:03:00 So the junk?

DAN

1:03:07 All that's not something I hear a lot as far as it going to junk, if it does for your customers, something you might want to let them know is just, hey, add that email address to their contact list and it would never happen again after that.

--- Quoting ---

19162211409

1:03:23 Says you're on the way to perform service. So I didn't get that one. Is that the one that came through that was?

DAN

1:03:29 When I sent earlier, the quote should be, yeah, quote from Anderson systems, it should look.

19162211409

1:03:37 Yeah, that one hasn't come through at all.

DAN

1:03:40 Interesting.

DAN

1:03:50 Let me try to resend it here.

19162211409

1:04:05 Hey, Dan, I know we're over on time here. I'm gonna hop out here, but I appreciate it, going over everything with this with you. I think... a couple of things I would wanna see, maybe we could do a quick overview, do a follow up meeting and have a quick overview on dispatch and billing, maybe see what it looks like and the end of the call, and then maybe some of the reports, like if you could pull up a generic report of what it looks like on the KPI'S of what quotes you're pending or what an account manager has quoted. And then maybe a quick snapshot report of what jobs are open versus closed or pending and how easy it is to do those quotes too. I think those are the things I'd like to, I'd like to see. Okay?

DAN

1:05:01 Yeah, absolutely. So terrific. So, if you got about 90 seconds more, I wanna introduce you to something that typically is helpful to the folks I work with and we can, do, you wanna talk about a date for that follow up meeting now or?

--- Quoting ends ---

19162211409

1:05:17 Yeah. Let me look at my schedule here. Yeah. Next... what's the date today? 20 first? I believe. So my Tuesday is open because I got to go to Indiana on the sixth. So, okay, Tuesday the 20 eighth.

DAN

1:05:38 Tuesday, the 20 eighth... I think I'm pretty open on that day as well. What's the best time for you is around this time pretty good normally.

--- Purchase decision ---

19162211409

1:05:50 Yeah. Let's go ahead and do this time. Okay?

DAN

1:05:57 All right. So what I do have on screen right now though, this is basically a workspace that I started to build out during our meeting today, but basically give you some resources that you can either share internally or review what we went over. I'll tag the meeting recording in here for you as well.

--- Purchase decision ends ---

KATIE

1:06:14 Still looking at service trade, Dan. Sorry?

DAN

1:06:17 Really? How about that?

DAN

1:06:26 Interesting. Well, let's...

DAN

1:06:43 Gotcha. Okay. I know what I did, I'm on some sort of dual desktop thing here... and I got it loading up right now.

DAN

1:07:01 Yeah. Sorry about that, Andrew. So appreciate you hanging with me there.

19162211409

1:07:05 No problem. But.

DAN

1:07:06 You should see it on screen now. So this is something I just started building out for us. Like I mentioned, it's gonna take us through some of the, what we discussed so far in an area here. And can you see it now? Katie? Yeah. Okay, perfect. I appreciate you there... as well as sort of the next steps, what we, what you'd like to see during our follow up demo on the 20 eighth. This is also something you can tag teammates in. So if you want to add their email there or drop comments in here with questions for me, sort of be a place for us to communicate and collaborate during the evaluation as we, you know, discuss new things, everything will kind of live in one spot, but I'll send you an email to introduce you to this workspace. Does this look like it would be useful for you?

19162211409

1:07:53 Yeah, I would.

DAN

1:07:55 Okay. Excellent. Well, Andrew, I know you gotta get going. Definitely appreciate your time today. And yeah, Katie and I, I'll look forward to next week on the 20 eighth.

19162211409

1:08:07 Thank you, Dan. Thank you, Katie. I appreciate it.

KATIE

1:08:10 Yeah, nice meeting. You. Have a great rest of your day. Bye.

19162211409

1:08:13 You too. Bye bye.

The End