



# **ServiceTrade Demo with Fountaine Information Systems Inc**

Dan Waggoner with Fountaine Information Systems Inc  
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## **Participants**

### **SERVICETRADE**

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### **FOUNTAIN INFORMATION SYSTEMS INC**

Brandon

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# Transcript

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

BRANDON

0:01 Can you hear me now?

DAN

0:02 Yes, sir. How are you, Brandon?

BRANDON

0:05 Hi. How are you doing?

DAN

0:06 Hi, I'm doing really well. Thank you. Thank you. Well, Brandon... will you have anyone joining you today?

BRANDON

0:14 No, I'm kind of spearheading this one at the moment. So if you want to be only me, you don't... really get involved with this one.

DAN

0:25 Gotcha.

BRANDON

0:27 That was where he'll have a 1,000,000 questions and yeah, and then it just get sidetracked easily. So.

DAN

0:33 Well, it's just me on this side too. So we'll keep it real simple. I'll try not to get sidetracked but... but my name's Dan Wagner. I appreciate you joining me today. I'm the territory manager here at service trade for California and the west, the south west regents. And so typically the best way for us to run these meetings. I know you had a good conversation with Dan yesterday, who set this meeting up and he shared a lot of that information with me.

--- Purchase decision ---

DAN

0:58 So that's given us a good spot to start. So, I'd like to kinda, I want to review those notes, make sure I'm on the right track, chat a little bit about your business. I won't make you really have the whole thing obviously. But then we'll jump into the platform. If this looks like something that, you know, it's going to provide value to you guys at a fountain Fontane?

BRANDON

1:20 Team information system, yeah.

DAN

1:22 Mounting into information systems and we can break out next steps towards the end of the meeting, whether that be, I'm, getting this in front of anybody else on your team or looking over a contract, whatever that might be. But how does that sound for a plan?

BRANDON

1:35 Hi. Sounds like a good plan to me. I have, I mean, I'm sure you probably know, seems like a pretty good. So I've done some... some research at this point. We've done some, you know, demo with other companies. Obviously, it's not a great time of software. So, you know, we kinda got a, an understanding of what it can and can't do we just gotta figure out what you guys can't... can't do, hopefully, there's more candidates... but he, I was very impressed with the way he ask questions and how, what questions he had a lot of other companies out there. So, I'm sure like semi script you guys have, but it's nice to get questions and actually meant something.

DAN

2:18 Yeah, absolutely. And been really great at that. So, I'm glad that... that was a solid conversation for you and you're exactly right? He's got a lot of great notes for me and if you don't mind, I'm just gonna kinda run down those real quick and I... and I had a couple of questions kind of spring from those as well.

*--- Purchase decision ends ---*

DAN

2:33 But it sounds like you guys are doing a lot of service and maintenance, low voltage Avi data tabling, no fire alarms. You've got four guys currently on the service side, planning to grow that number of possible as soon as possible.

BRANDON

2:51 Yeah.

DAN

2:54 Well, you're not alone there, Brandon.

BRANDON

2:56 Pretty.

DAN

2:56 Much. This is pretty much how we start every meeting. Hey, if I could find more guys, I would, but I think that's why it's so important to utilize the people that you do have, right? Make sure you're getting the most out of them and they are as efficient as possible. So empowering them with something like service trade can be a great way to do that with the skilled labor shortage that we have right now.

BRANDON

3:17 Yeah.

DAN

3:19 And so, let's see mostly more recurring service on the it side. Let's see you've. Got to say which I'm not very familiar with that field capabilities. And so he was mentioning a little bit about. So I like where your head's at, right? You've... you've got, you want to have something. It's almost acts like a CRM for your customers, keeping all that interaction and make sure let me know if I'm on the right track here.

*--- Customer engagement ---*

BRANDON

3:43 Yes.

DAN

3:43 Keep all that interaction with you and your customers throughout the service cycle on one platform from start to finish. So there's no jumping in and out of different avenues to get to where you need to be, you know, and... and finish that interaction. So it's as smooth as possible.

*--- Customer engagement ends ---*

BRANDON

3:58 As possible that's the goal. I mean, avenues, you know, if we receive a phone call or text message or whatever that may be that's why we can manually enter that. I think one of my biggest things is getting the data from what we said, you know... you know, connect in the call ticket because it's done from the ap side of things, right from CRM, but, you know, talk through what are you getting ready for two months? But, you know, keeping that... that thread that email for I'm essentially really what it is and keeping it all in one spot so we can communicate. This is a big thing right now, but we understand that that's going to be, could potentially be a tricky thing. No, yeah.

*--- Access to information ---*

DAN

4:39 We like to think it's pretty simple. You know, I mean it... it should be right? So... you... you mentioned that you're having some issues in the field with a connecting

back to whatever you got going on in the office. And it sounds like there's two different applications. Totally something different in the field than it is in the office.

*--- Paper process ---*

DAN

5:00 Are you guys like losing data transferring back or is it just too hard to use where they can't find out what to do or how's that?

BRANDON

5:07 Yes, basically, I mean... we have to say I call it's tough to say a PMS one story behind that. But that football and so part of... of VMS, just think that... that business, it's recurring stuff. It's doing all of our contracts, everything. So there's something there but at the same time it... it does it... it tickets if I'm fine. No issues there. You know, on the computer products do anything you want to do it to be right?

*--- Access to information ---*

BRANDON

5:43 But it's... it's a DB but just not efficient... you know. So it's... it's just garbage might be. But... but as far as the text will kick it out. But I have an application that can use on their phone. Hello, what do you want to have a picture? No, you can't do that. You can't do that. You can see basically the script from what we're talking about project... computer though, you know, it just doesn't have the ability. You can do it on the, on your web browser on your phone, but you might as well. And so what's happening is I got text on site and we're literally going into a job and they'll just calling back for what am I doing here?

*--- Paper process ---*

BRANDON

6:28 And I actually think about it at this point. I just break it down and calling in the evening. I gotta remember grabby far through this, it's... it's painful and I'm losing my mind and I know there's a better way obviously. But anyway, so when they go to enter time, put notes on that ticket, they're not doing it on site.

*--- Paper process ends ---*

BRANDON

6:49 They're not doing it before you, the job going back to the office. We're getting everything they did, the parts that they may have installed, but we're not in the scope the built, you know, other little things. And you know, then at the end of the day, they're not the same home. And then, you know, if I payroll time and also... and then there's an hour somewhere because they're... they're scrambling to get the requirements. I can get paid.

DAN



7:16 Yeah. And I mean, that's great that, so so so many companies that are using an ineffective software, something that's too difficult for technicians to utilize and not very clear having to jump in and out of it, right? So they don't do the, they don't collect that data on site if they're doing it later. I think so many companies are unaware of all the parts that are just getting given away, right?

BRANDON

7:42 Giving away because we're small enough, but even then it's I'm sure it's something I'm not, and I'm not... I'm not getting.

DAN

7:50 Yeah. Well, what I was gonna say was it's great that you're aware that hey, obviously there's a better way to do this. I know that they're you know, we're missing things with the process that we have right now. So it's fantastic that, you know, you've already got a grasp on that... and so let's see here. So with, sorry, I lost my train of thought for a second there.

BRANDON

8:12 Mindful about... I can't remember anything anymore.

DAN

8:17 Yeah, it's been a, it's been a heck of a day, I tell you. But, yeah. So, so something effective for the technicians. So, yeah, what I was gonna say was, I mean, it's... it's the same for anybody, right? If you're not collecting that right then in there, for example, if we meet and, you know, I don't send you a recap of our meeting until tomorrow. I'm obviously gonna lose some things in transition and let you know... whether it be big things are small things, you never know, but it's stuff that, that's going to be that could be valuable to us that we're just not we don't have and obviously a lot of the information to you probably want to Act-On immediately.

--- Customer engagement ---

DAN

8:52 Hey, if there's a repair opportunity, which is something I wanted to ask about what kinds of repairs on your service and maintenance or you typically coming across is that a pull through revenue a big thing for you guys?

BRANDON

9:02 I would say we're not capitalizing on as much as we could.

--- Customer engagement ends ---

BRANDON

9:08 I mean we are, how many parents, I mean, like give you an idea. I had a guy out today. They're the... building. Yeah, right, right. So we have, you know, we had this first of all source one of those special one. So we were able to pull up. I haven't okay. Have a good part, install it and do everything like that and then obviously pass

everything. So that's the part. I have a, I wouldn't say, hey, the other thing, but it is definitely, you know, we're... we're experiencing that, you know, cameras not working, you know, and you're down doesn't have power, you know, whatever we, so we're trusting, you know, sending somebody out to look at it on the IP side of things both of the remote. I'm sorry, I thought you feel, but obviously that for the practice comes in, you know, we're communicating property on a single issue. No, we're monitoring or whatever. So, you know, when it comes in. But I mean, you know, standard service stuff. I mean, I would say I've got my guys on projects... off and one guy off and send them to go to the service thing.

DAN

10:22 Gotcha. So sounds like to me something that's gonna keep you guys off the phones and not, you know, having to call each other all day long, you can.

BRANDON

10:33 Yeah, I have, okay, I have it on my phone and on average, I'm averaging almost 60 calls a day.

DAN

10:39 Yeah. So I mean that's gotta be hard to much less keep your train of thought for what you might be trying to do, but also even have the time to... to, you know, work on the business rather than just working for it. So something that gives them that information that they're calling you for. And it sounds like job information as well as maybe reporting some details to like that door, repair that type of thing. So having access to that kind of stuff would eliminate a lot of that... needle. It would make that communication non-existent essentially, they're already have that information. So.

BRANDON

11:12 Even putting notes in the paper model, what's the plan? What's your goal? You know, like just stop assets. It's all... it's all in my head and I thought all of my head, but I'm just saying like the day to day it's like it can be easily regurgitated out onto there. And then you call me, why are you calling? Yeah. So in that... in that level, I want to get, you know, there's no reason we can't either.

DAN

11:41 How do you think a system that accomplish that would affect your... your bottom line, right? Do you think that, you know, you guys will get more work done? You'd get... how do you think that affect your finance?

BRANDON

11:54 Financially, I think we're you know, obviously some more efficiencies are gonna impact that can make that, you know... we were going to have more info because, you know, we're accomplishing things that are more, you know, other quicker rate. You know, I think it would also impacted because the, you know, we'd be able to catch little things obviously that we were talking about things that we should go forward or not. And then also catching, you know, sort of things. I gotta fix this. I'm fixing this afternoon with this. Okay? And I'm gonna ask me to run at five today. That last one is usually drop.

DAN

12:34 Yeah.

BRANDON

12:34 You know, and it's not intentionally. It just gets Scott mentioned it to me. So if they have in their notes or something that we could easily... yeah.

DAN

12:46 Yeah. So that's like a job where they're going to check out the cameras and hey, there's another piece of equipment the customer might mentioned or they see that needs work and they don't have time that day, but they need to get back to it and it just kinda gets looked over.

BRANDON

12:59 Yeah. Yeah. I have another camera here, you know, that kind of thing that happened today with one of my other pets one service and then walk with, you... you know, we're all these. Okay. Yeah. So.

DAN

13:16 Well, I've got a, I've got a great solution for you there. I think you're gonna love it.

*--- Access to information ---*

DAN

13:21 I've also, I think you're gonna really enjoy the... the capabilities of the mobile app. So I'm excited to jump into this. And I'm sure we'll have more questions as we go throughout, but I just have a couple more before we kind of get into the actual platform. So keeping that in mind with the... the, in the fact that you... you have looked at several software over the last couple of months or years, it looks like.

*--- Pricing ---*

DAN

13:45 But have you established a budget for something like this? What you're looking to spend?

BRANDON

13:52 As I mean, right now, I don't know if it was a bug, but I wanna say right now total package with what we're doing is about 400 bucks and that's including it glue... you know, you gotta people, but, you know, managing assets, you know, everything that we're using right now, it's about 100 dollars on the low on the less expensive five. But at the same time, you know, if the... if the shoe fits and I can justify it and I'm gonna see return on that. It's a no brainer.

DAN

14:32 And 400 dollars, is that like monthly or?

BRANDON

14:37 Yeah.

DAN

14:38 Okay, cool. Does that include Quickbooks?

BRANDON

14:41 Yes.

DAN

14:42 Okay. Gotcha. Cool. So it sounds like this is going to be your call you're kind of the... the software guy and we wouldn't necessarily need to bring anybody else into the... the decision or.

--- Pricing ends ---

BRANDON

14:59 No, I don't have to run it by my partner. He's going to be retiring in two years, but to be completely honest, you started the checkout already as soon as he may be agreement. So... he normally, you use the software clean, you like his thing. So... I think this will help with like now your boss about you, but I'm running with it. So that's why I'm doing it as part of software. You know, anybody, you have to go with your business and we use Zendesk years ago and you have great integration with our email lacking in some areas that we need it. So we moved off, right? You know, it's just like, you know, evolution and what are evolving to something that hopefully and all of our service side of things because it's grown from essentially done to, you know, at least 60 percent of the business?

--- Type of work ---

DAN

15:57 Gotcha. How many jobs are... are your guys doing between the four techs per week? Would you say?

BRANDON

16:04 Service that if I were to say offhand and that's part of the call, I can't say because I don't I mean, I'm... I'm on scheduling it, but the same time, I mean, it all depends.

--- Type of work ends ---

BRANDON

16:15 I mean... no room for two a day. So... I'd say eight to 10, you know, a week and then the other stuff all projects which I would say we run projects very similar to our

standard service stuff. There's. Really not much difference. Gotcha. Yeah. So it'd B to B every day all day for everybody. So.

DAN

16:41 Okay, cool. And the projects to, you know, about the same amount. So maybe 20 jobs about that. You're completing them per week or?

BRANDON

16:49 No, we're lucky we get one of the one that only...

DAN

16:53 Gotcha. Cool.

BRANDON

16:55 Project that's one day, which is pretty rare and I think some of the deficiencies could be in one day for sure.

--- *Purchase decision* ---

BRANDON

17:03 But, you know, most of our projects, so for a couple of years too. So it's kind of hard to gauge that on average, we'll probably in a week or two for products.

DAN

17:15 Gotcha. Cool. Awesome. So let's see timeline. When are you looking to be, you know, let's not to put the cart in front of the horse, right? But.

BRANDON

17:25 Yeah.

DAN

17:25 Let's say we make some good progress here. This looks... this looks like it's gonna fit for you guys, when would you want to be up and running and using service trade?

BRANDON

17:35 I, I'm... I'm getting burnt out on this whole process... that said, I'm motivated to move. I just want this to be over, you know, and... and I know... I know that's fine with me or just beginning... but... but I'm motivated to put time in. The good news is, and I think we already have our process. So it's a matter of just moving them over, maybe, you know, in... in moving them a little bit to learn what you guys have or something. But no, I think that works. I will actually go for it. But so, I mean, you know, if it makes sense, I mean there's no reason not to move forward.

DAN

18:16 Gotcha. Cool. Yeah. And yeah, I think, you know, implementation is a lot easier than folks think most of the time, especially if you've got Quickbooks that's going to be really easy to upload all your customers onto there, but we definitely review some of that as well towards the end here. The... is there anything else that you're looking at right now or is?

BRANDON

18:36 I'd say... I'd say the main contenders a moment, our Salesforce and I want to let you know... and... and why we're different from a long time. I'm looking at my spreadsheet... fusion tab or fusion... fusion ServiceFusion. Hello, gotcha. Just so, you know, full transparency. I don't know if you've heard of BuildOps.

--- Purchase decision ends ---

BRANDON

19:07 Yeah, we... we actually signed with them starting to move forward but we were oversold and it was like, you know, we can communicate with your clients within the app, right? Yeah. And then like, you know, waiting to get the facts to... back to you. And... and so you can send emails out with a quote for campaign, communicate within at all right now.

--- Accounting integrations ---

BRANDON

19:36 And I'm like that's... that's broken. Gotcha. Anybody within CRM or anything that we don't have any integration about five months now. Sorry, you know, for somebody without us.

DAN

19:51 Yeah. Okay. Good to know. Good to know. Okay. So you're still considering Salesforce and pro infusion?

BRANDON

19:58 Yeah. I think... right now honestly, I think the best... the best know ServiceFusion for our company, love it or not psyched about it, but I think it's the best fit.

--- Purchase decision ---

BRANDON

20:14 I can spell check my bosses and anybody else at the moment.

DAN

20:18 Gotcha. And not to go down too much of a rabbit hole. But what do you like about ServiceFusion?

BRANDON

20:26 I mean, I think it's probably a lot of the... the, so things that you guys have. I mean, I can just kinda go down. I mean, everybody's going to have a Quickbooks integration, Beth, a no brainer, you know, they're gonna handle maintenance contracts that are going to have, you know, service subscription... interface. They have that, but it's okay. We'll use that... you know, we can handle retailers, you know, we can kind of do email, but it's gonna be through zap your integration. So it's not gonna focus popping up the information within the system, which is probably, I don't really think we need you'll be changing our process, you know, like everything you do would be changing it, but it does have contractor management, which is kinda cool.

--- Accounting integrations ends ---

BRANDON

21:14 You don't use them a lot, but we do have project close date and we will push those out there, you know, for a little layover. So give him a little bit information... barcode scanning or inventory asset management was pool... asset management, the big one, I think because I really want to move away from it glue and have everything in one place that the client has. So that way it makes sense. Everybody's got GPS stamp... you know, from the... the technician standpoint?

DAN

21:52 Fusion do that as far as the GPS?

BRANDON

21:56 I mean...

DAN

21:57 Is it like a constant track though, kind of like an goober car? Or is it?

BRANDON

22:01 No, I don't think so. Okay. It's just when they talk about in the past since it at that point, gotcha for us honestly is fine because I don't know, I don't see us needing real time. We're not so pounds cellphone for people were getting them, you know, X amount of dollars for their cellphone.

--- Accounting integrations ---

DAN

22:22 Yeah. I was gonna say, I mean if it tracks it the whole way, then that typically drain the battery which you don't want. So... what else? What I will say? It's something interesting. You said everybody's going to have a Quickbooks integration. Did they show you their Quickbooks integration?

BRANDON

22:40 I do not remember 100 percent... that I'm finding a lot of people don't have seen it's more about... so.

DAN

22:54 And I just wanna make sure that, you know, if... if, you know, you end up meeting with him again or whatnot, obviously, I hope that we make, we can make it happen here today.

--- Accounting integrations ---

DAN

23:03 But I'm the Quickbooks integration is a reason that a lot of ServiceFusion customers come to us is because it just doesn't work correctly. And so I would make them show... show you that, right? If... if that's something that's important to you.

BRANDON

23:18 It's not necessarily important. It's important for the business. Yes, but not my problem, accountant and stuff. So.

DAN

23:25 Yeah, last thing you want is scrambled accounting data and... and yeah, we know how the account and can be.

BRANDON

23:32 Yeah.

DAN

23:32 Another thing I'd mentioned with them is that they're at, from what I've heard goes off line a lot. So that means, you know, you lose a service, you don't have strong connection, then you just lose what you're working on and it crashes.

--- Type of work ---

DAN

23:45 So those are two reasons that we get a lot of customers from ServiceFusion... also based on. And I didn't really ask this yet but commercial versus residential or your... or your customers, you know, single family homes or what... what do you have going on?

BRANDON

23:59 We're about 95 percent commercial or more.



DAN

24:02 Yep. And see we work with commercial exclusively. And... and like I don't want to bad mouth them. Great platform. They were... they were created for residential. So they started, I think when you search among Google, the description on the right side says for residential service providers. So.

BRANDON

24:16 Yeah, there's a lot of service to just have a lot of feature, neat features. But, you know, the reason we're talking.

--- *Purchase decision* ---

DAN

24:29 Awesome. Well, I'll make sure to kind of recap those just in case, you know, you're wondering down that path with more. I wanna make sure you're... you're getting the right information, right? I don't want you get oversold again.

BRANDON

24:41 Yeah, I know what I'm sold and that's part of it.

--- *Purchase decision ends* ---

BRANDON

24:45 The guy was a little pushy and it was just the whole situation with that and, but the interface was clean and simple... and simple, but the interface with clean and... my... my... my... my quick, you know, back in working opposed to other thing, right? So that was why why's that well?

DAN

25:10 Hello, unless you have any questions for me, we can dive into it here.

BRANDON

25:15 Nope.

DAN

25:16 Awesome. And so I got a few slides just gonna share a little bit of background, you know, where we come from, who we work with, and then we'll jump right into the platform. But so, so we've been around about nine and a half years and we work specifically and exclusively with commercial service companies, right?

--- *Type of work* ---

DAN

25:31 A lot of fire protection and a lot of H back companies doing preventative maintenance, recurring service. And the... the main difference or one of the key

differences between that residential provider in the commercial providers, you guys have opportunity when commercial, you know, you're going to see them four times a year if not more.

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

DAN

25:50 And you're... you're building a relationship over the years, you're able too show them your value and... and, you know, sell more to that essentially by building that value with residential, you know, on that, you know, the differences, you know, it's one and done work a lot of time. So that's a lot of what service trade is going to be focused on is engaging with your customer to build that solid relationship and manage your... manage your business relationships. So we want to help you be more valuable. This is our mission statement to your customers and grow your business.

*--- Pricing ---*

DAN

26:23 And right now our customers see 23 and a half percent on average increase year over year. Our top performer see more closer to 40 and 50 percent... increases.

BRANDON

26:38 I have about that.

DAN

26:41 Yeah. I mean, what would that mean for your business? You know, 25 percent increase here in the first year of service.

*--- Pricing ends ---*

BRANDON

26:48 I mean that to me, that means we're being efficient and my biggest thing even go through email all going to be more efficient. And what I'd let things go on the software side for years because I've been well, this is about it's not my arena. I'm not in charge of. This is not my responsibility. And now it's like showing me and only me and then what... what am I doing? So, you know, it's not necessarily finances. I mean we're fine with that. I'll take being approved. You'll get the work done by the, it's... it's a sanity at this point.

*--- Customer engagement ---*

DAN

27:25 Gotcha. Yeah, I mean, it all starts with operational efficiency, right? Visibility. If you don't have that, you don't know where to start. But so we're going to help you organize all your records for your customers on the same platform. Like I mentioned, I'm have everybody completing their work on service trade from start to finish. And the service cycle, provide the visibility to your team to get the most out of the

resources you have. And, you know, efficiency is obviously very important but there's you can only get so efficient. I think, right? You can only run so fast. So once you've mastered that, you know, there's nowhere more to go up, right? But with service trade, that's why we focus on like I mentioned, building that customer relationship. So the way our customers see growth outside of that efficiency, you know, on top of is by selling more to their customers, by showing them, you know, what needs to be done, making it easy to interact with them easily approved online quotes, pictures and description of exactly what needs to happen and the situation you described earlier.

--- *Deficiencies* ---

DAN

28:27 Hey, customer mentioned you might want to extra camera or wanting me to take a look at this equipment. A technician can report that to you in about 30 seconds and send that report to you. It's a six step process. The same every time that we're going to go through that, we provide the information for you to compile a quote like this or proposal within minutes all in real time without a phone call or any of that shenanigans.

--- *Customer engagement* ---

DAN

28:50 So that's you know, partially being efficient, but also the Rich details that you're providing the customer to sell more to them, make it easy for them to say yes. So our customers currently see about 11 percent more per job. So our customers are growing without even adding new clients, right?

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

DAN

29:13 And this type of information that you can share with your customer is going to help you stay competitive, show them why, hey, they're not even gonna think about going to another provider when the information you give them. And it looks like this compare to, you know, a fax or a phone call or scrambled email with attach PDF documents from the other guy, right?

--- *Customer engagement* ---

DAN

29:32 So providing that seamless transaction similar to the way Amazon goober have, change the experience for a taxi cab and change the experience for an online vendor. You know, they... they keep your records. I can order something in one click. I have a car pulling up in my drive way, you know, easily quick and fast, right? And they've exploded. And so the similar type of expectation for your customers is coming and it's a little bit already here, right? They want. Their records cap, they want better information, they want it to be easy, nobody wants to phone call for a Bill, nobody wants it in the mail. So just making it easy for them, right? Showing the.

BRANDON

30:15 That's where we are. It's easy to do business with us. They'll keep coming back and that's the goal. You know, it's like we each have our qualified before. It's... it's too much of a hassle to deal with it just to see, you know, and you can send them the job hours because they weren't even ask for up, you know, we gave it to him, you know?

DAN

30:38 Yeah.

BRANDON

30:39 There was a charge for that. The time, you know, again, you know, the deal.

DAN

30:48 No, but you're... you're right on your right on target. And... yeah, and so... I, you know, I can take a situations in the past where folks who told me, hey, they're saying, hey, we left this off because we forgot to charge you for it. Just let you know you're getting a free and then the customers thinking, well, hey, is there ever a time they're charging me too much? And I don't know, you know, and so it's it doesn't really lead to a trusting relationship, right? So just not having that conversation altogether.

--- Access to information ---

DAN

31:15 It's just can be... can be really good. So, so we're going to look at three different views of service trade today. We're starting the office, the mobile view and then the customer facing view. So that's the... the interaction with your customer, what they'd see. But as we're signing in on the office. So this is a, any web based browser can sign in anywhere you have internet service trades, a true internet application. So you can have as many users as you'd like on the office side, as well as sign in from anywhere you have internet access. But I've got my daily schedule, all my technicians jobs scheduled today... below that.

--- Recurring maintenance ---

DAN

31:53 Once I've set up recurring services, so say I have monthly inspections, quarterly inspections, and that type of thing for customers. I'm gonna sign that on their location and I'll be able to generate reports, say next quarter's work next month's, work three months from now is work and schedule that out.

--- Recurring maintenance ends ---

DAN

32:08 However something slips through the cracks or an emergency call comes in and something gets rescheduled or cancelled. We're going to remind you right here that,

hey, this is due in this timeframe and you haven't got it scheduled yet. It's coming up in two weeks and then overdo work. So wanna make sure you're accomplishing and achieving all of those quarterly is on time so that they're not getting pushed back weeks... weeks, right? And shifting that revenue back. Also make sure you're delivering your promised to the customer... as jobs or mark complete. They're gonna fall to these buckets below. So jobs to be marked, complete the office, we'll have a chance to review it, make sure all the information is correct and send that Bill to the, to your customer or act on it accordingly, whatever needs to happen next. Great.

BRANDON

32:57 Yeah.

DAN

32:59 And the dashboards, like in a 1,000 foot view, right?

--- Customer engagement ---

DAN

33:01 Of your daily operations, you can find all this information in different reports and service trade. But this... this stuff is front and center. So right as you sign in, you can make sure you're not missing anything as well as see where all your guys are.

BRANDON

33:13 That.

DAN

33:15 So the way it kinda helps to understand how customers are set up in service trade.

--- Recurring maintenance ---

DAN

33:20 And so do you have a lot of for commercial, a lot of times, you know, you'll have the... the parent company and seven or eight buildings or... or a chain of restaurants for example, or hospital with different legs that's all being built to the same parent company. Is that accurate for you?

BRANDON

33:36 Yeah. I mean, yeah, we've got both sides of it for sure. I mean, you know, we're building the site, but there are still, you know, a trial of the company yet and then build a corporate office for everything. So, you know, all the above.

DAN

33:52 Well, yeah. I mean you label this whatever you want to write a parent company, whatever... whatever you choose, but the parent company can have as many underlying locations as you'd like, and you've got the billing contacts here as well,

pretty bare bones though, right? Because we're not actually providing service to this billing account. So the service and the asset management that you mentioned is going to be helpful for you is all going to be located on your location pages. So that's where you're actually providing service, you're going to have the actual locations set of contacts. And this is where you're gonna find all the information you need for this customer location. On one page. I've got the 192 jobs that we've completed for this location in the history since our relationship started... comments, right?

--- Assets ---

DAN

34:38 That... are need to knows for every job at this location, like a gate code or a latter size, anything that might be helpful for a tech?

BRANDON

34:47 Yeah.

DAN

34:49 You can assign these comments and they're gonna show up on every work order that's generated at this location, no matter.

BRANDON

34:55 Yeah.

DAN

34:59 So we'll get into a lot of the information here on the location page. And because we're going to be visiting it throughout as... as we complete our work order. But is there anything that looks interesting here? Do you think having all this in one spot would be helpful?

BRANDON

35:11 Yeah. I mean, I think it's... it's definitely helpful. It's a club level similar to what we currently have, but... you know, is there, I think having it in one shot like this benefit definitely.

DAN

35:26 Okay. So you said it's similar to what you currently have, and so the... the difference might come when we get to the field and how information passes back and forth or what's visible to them in the field.

--- Assets ends ---

BRANDON

35:39 Yeah. I think that's where that's gonna work. So.

DAN

35:41 Okay. Alright. Well, let's get to that. And this is our work order for today, work orders, recall jobs and service trade. And for those projects that you have that might take a week or a year, however long a work order or job can have multiple appointments.

--- Tech On-site ---

DAN

35:59 So you can have the same work order and have a guy clocking in at that same work order and location, you know, 30 times over, you know?

BRANDON

36:07 Yeah.

DAN

36:07 Several weeks. And then when he's finally complete Bill for all that time that's tracked on that work order. So you're not having to create a new work order each time, anything like that. So you can.

--- ST app contracts and pricing ---

BRANDON

36:17 Yeah, progress payment or, you know.

DAN

36:22 So you can absolutely create multiple invoices per job. So, yeah, if you just wanted to look at what they're gonna and do the math on your own there essentially building 500 of the a 1,000 you can absolutely.

BRANDON

36:36 Do that.

DAN

36:40 But we're going to create an invoice today.

--- Access to information ---

DAN

36:41 It might make a little bit more sense when we do that. But let me jump out here. Let me bring up my eye pad. What kind of devices do you guys work on out in the field?

BRANDON

36:54 Yes... we've got the I pads. So I mean, apple, android everyday.

DAN

37:02 Well, gotcha. So apple and android or what the service trade app is going to be available on any phone in the last seven or eight years is gonna work, right? Any phone or tablet. Cool. So, I've got my top golf Seattle job today. And then this demonstration, you're going to be acting as our owner of the top golf and I'm headed out for my job.

--- Tech On-site ---

DAN

37:26 So retract three different types of clock in interaction. We won't do job prep this time, but I'm gonna clock in is in route, notify my customer, I'm on the way... you should get that notification here in just a second, but just the extra step, right? To put your brand in front of the customer in more ways than just when you're sending them the.

BRANDON

37:47 Yeah.

DAN

37:50 I live on site. I'll just punch clock out. It's gonna prompt me to clock in on site. And I am good to go. Now, the... the work order pretty straightforward, pretty self-explanatory the service that I'm here to provide. So this is the checklist or templates that you've created per customer per type of work, per type of job, right?

--- Assets ---

DAN

38:12 That can easily be duplicated across accounts. You know, if you're doing the same types of services. But here's what I'm here to do. This is the asset that I'm working on and this alarm system, this could be, you know, CCTV are measuring any asset, you know, that's relevant to you guys. So I'm here to work on this specific asset today... and I can take a look at the asset history here as well as any information that might be helpful and service trade separated it to what's happening on this appointment. However if I wanna look at everything at this location, I can click over here and that's going to show all of the equipment on the location.

BRANDON

38:55 Obviously, we can break it out. So, you know, all your server. Yep, that's... that's good.

DAN

39:08 So the alarm system, when I click in here, I can take a look back at service history, click straight into the job, see any comments or items that might have been used on previous jobs, any notes? And we're going to break this service history down



by asset. So commercial building, you got a lot of equipment. You don't want to scroll through 100 different work orders to find the one that's relevant to the equipment you're working on today. So this service history is just what's related to this asset. So I can easily find what I'm looking for. Now. I can also look at deficiency. So these are all just repairs services, Ruby all the PMS, the services, the repairs, everything deficiency is going to drill down. Just find the repair.

BRANDON

39:53 Yeah.

DAN

39:54 Any attachments I want to add as well, documents, manuals, photographs.

*--- Deficiencies ---*

BRANDON

40:02 That's fine. Like attachments. I guess this is... when the tax out there, and they quickly pull up a camera snap and do multiple pictures of the time or upload multiple countries of time from an emerald?

DAN

40:16 Yeah, absolutely. Yeah. So I'm just gonna tap attachments tab here and you can add a lot of different types of attachments. So I can add from library video scan, document record audio. I'm going to just take a photo here, snap a photograph and add that maybe I've got a before and after... upload that. I can add notes to any attachment that I had. If you've got like a form or a piece of paperwork, something like that.

*--- Deficiencies ends ---*

DAN

40:43 I don't know sometimes vendors have those that they need to give, you... you can go ahead and attach that here.

BRANDON

40:49 Yeah, it's where I don't have quoted for, yeah... that's questions, yes.

DAN

40:58 And I think something you mentioned earlier was job items, right? In recording things that they used.

*--- Tech time tracking ---*

BRANDON

41:04 But...

DAN

41:04 Also an easy way to track time. So, we know this jobs supposed to take about two hours. So as a technician, I'm arriving here now, I'm gonna go ahead and source this technician, Dan save. So now when you're running payroll, you can easily run a report to see all the hours that Dan that were source to Dan to find out what you build for him this week or this month.

BRANDON

41:30 Wait, I don't... I don't know if I follow. So he's typing in a row... that would... that would be the time card essentially, right?

DAN

41:41 And so I'm sorry, go ahead.

BRANDON

41:44 I... I don't know. I'm just trying to follow exactly what that does.

DAN

41:48 Yeah. And you can do it.

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

DAN

41:49 And thanks for asking that might have gotten a little ahead of myself. There's three different ways you can track time and service trade. So it, the one is going to be by items. So if you're charging. And so this is what you'll charge the customer, right? If it's two hours at 55 dollars and that's what you're charging... that's going to be on the work order.

--- *Tech time tracking* ---

DAN

42:08 So you can charge... charge that way you could also. So when you clock in, you can track the actual time they're on site, run that report against what you charge the customer, what the technicians said.

BRANDON

42:19 The...

DAN

42:19 Bill and... and make sure everything's accurate.

--- *Tech time tracking ends* ---

BRANDON

42:22 Okay.

DAN

42:24 So, if they were there for four hours and... and, you know, they're billing for eight might be, you know, worth the conversation.

BRANDON

42:32 Yeah, yeah, no, I agree... I agree. I don't think of all sizes.

DAN

42:37 Yeah. And I mean, you don't have to do it this way, totally up to you... whatever works best for you guys.

BRANDON

42:44 Yeah, prefer.

DAN

42:46 Now, if I did years ago.

BRANDON

42:48 It's more of a struggle. I'm seeing mount road. Okay... okay... okay. I think we're done with this, just sleeping on the job apparently.

DAN

42:59 Gotcha. Well, if I did add apart or... or had to pick something up, I could go ahead and add that at the bottom here as well.

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

DAN

43:05 So the office knows when I complete this, what to Bill for. So say I used for widgets today and the cost is gonna fall in determined by our price list and I can source this again, say I had it on the truck. I can just source it that way if I picked it up from a parks meant or I can also source it from them into your parts vendors into service trade, go ahead and select who I picked it up from inner, a purchase order number, if I have one. And if I've received it, go ahead and mark that as well. And I'll even tag this to the service that we're working on today to make sure we know where we use the.

BRANDON

43:40 So, is your question, if you still... got a solid from a call with them? Is there a way to automatically have that happen?

--- Parts management (inventory) ---

DAN

43:51 If, every time you sold a widget, you automatically had to do what now?

BRANDON

43:58 Okay. I'm going to power supply and... every time, right? But that's a separate product. So every time, right? Automatically do that.

DAN

44:14 So, like on this job, every time you need a power?

BRANDON

44:17 Yeah. Every time I sell a widget, I know I need to follow up or... or spruce this personal or whatever, right?

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

BRANDON

44:25 Right? I just know that... that I'm gonna need it in the past five years and years ago and we can build stuff. So automatic came up and it would pop up. Hey, do you want to map? Do you need this? You need cable... check... check... check... check... check?

--- Quote templates ---

BRANDON

44:41 And, you know, it was really easy for me to be an option. I almost forgot that, you know, if I'm in a hurry, something, right?

DAN

44:49 Yeah. So there's a couple of different ways you could do it, you can make combo items or you could set up the templates for, hey, if I'm installing this, then it's going to require for widgets, power strip and whatever else, right? And so.

BRANDON

45:03 Or...

DAN

45:03 You'll be the individual parts, but it would just be signing that service. So similar to a quote template there. We're going to apply here in a second. But yeah, you could accomplish that in a couple of different ways.

BRANDON

45:14 Yeah, climbing is important for me to not necessarily mobile, but, you know, I spent a lot of time doing that.

--- Tech On-site ---

DAN

45:20 Okay. Well, so let's get to that because this is really the good stuff, right? So again, when you mentioned, hey technician forgot to tell you about say they wanted a couple of cameras or something they wanted to have looked at while they're on site today and they didn't make it to it, I can just add a deficiency here on my work order... access panel replacement.

--- Deficiencies ---

DAN

45:44 So something common or... or what whatever you've got going on, right? Next step is going to be adding media. So I'll take a picture... can add notes here. Of course.

BRANDON

45:58 You mentioned having in your library. Can you upload a bunch of the same plan where you have to do it individually? Yeah.

DAN

46:04 And I was actually just about to do that for us. So yeah, if you want to just take them in your library and add nine, you're... you're welcome to do that. And you can also just pop in here and take a video or record audio memos as well.

--- Deficiencies ends ---

BRANDON

46:20 Good morning. Anybody talk though. No, that's good because sometimes it's better explain through voice.

DAN

46:28 Yeah. I mean, sometimes maybe you've even got like a buzzing sound I know for like electricians and things like that or just a note for the technician to remind themselves. So can be helpful.

--- Deficiencies ---

DAN

46:40 It's there if you need it. Step three, just gonna label this. So maybe it's just suggested in operable or deficient. So this is going to allow you to capture. This is gonna be so easy for your text. It, it's going to allow them to capture not only just the,

hey, this is broken and need fixing, but also, I see that there might be an issue coming up here. Let's recommend this, right?

*--- Deficiencies ends ---*

BRANDON

47:01 Yeah, that's important. No dependencies. Is there a way to, I mean this, maybe I'm just trying to think how to give somebody credit central. So or, you know, something of that sort.

DAN

47:17 Yeah, 100 per cent. So each job and so each deficiency in each action or item created in service trade is going to be sourced and it'll have history of who created it so you can run reports to see how many deficiencies to Dan report this week. I've customer who runs that report weekly and gives a gift card and it's like a 50 dollar gas card to the tech with the most efficiencies that they report weekly.

BRANDON

47:41 But that, that's pretty good. Actually, it's not bad because that's gonna pay for itself in one shot.

DAN

47:49 And make it a little competition, but this is going to bring up all my assets and all I need to do is drill down by, you know, couple of letters and numbers.

*--- Deficiencies ---*

DAN

47:56 However we associate to that asset... it will automatically filter it into the type of equipment. It is in the last step here is just to mark, this is new. Maybe I fix it on site. I can market that way as well or verified by the customer, but in this case will do new. Now, there is a final step if they need to propose a solution, but they could also put that in the first line. But if they need any extra notes here to let you know what needs to happen if it's not clear as day and they can enter those in at the back.

*--- Deficiencies ends ---*

BRANDON

48:30 Yeah, that makes sense. So, is there a workflow or what we call David workflow? We can force the text to, do, you know, I'm certainly going to border but like I can't check that box, they can buy before and after pictures or something.

DAN

48:46 So there's not... a... a rule where they're not gonna be able to clock out. And the reason for that, we don't wanna restrict a lot of things and service trade because hey, something comes up and emergency job or maybe they're you know, girlfriend gotten

a, you know, an accident, something like that. They have to go. We don't want him to be stuck on there and... and messing up the data, right?

*--- Access to information ---*

DAN

49:09 One of them have be able to move away if they need to. But in the same for... for, you know, every... every part of service trade. But what you can do is set permissions to what they can see. So, a lot of times folks that have trouble with them completing work and not filling out all the information when they start service trade, what they'll do and we're going to switch back to the office here.

*--- Access to information ends ---*

BRANDON

49:33 Well, one of money with a soft spot... mascot, I'll work.

DAN

49:45 Yeah, that's you know, it's... it's it, it's a winter. I like top golf as well. So.

BRANDON

49:50 It's a, it's definitely a good business.

DAN

49:53 Yeah, absolutely. But so this is like for example, the job that I'm on right now and it's released to the technician.

*--- Dispatch ---*

DAN

50:01 Now. I can unreleased it, it'll disappear so I can't see it anymore. So if you wanna look at your text work orders and you can do this in bulk as well. For example, if I want to, at the end of the day, Monday, I'm gonna release all Tuesdays work or just released the mornings work, right?

*--- Customer engagement ---*

DAN

50:16 Given visibility into small amounts of work at... at... at a time. So they're not getting their next work order until they complete it. So that's my best recommendation for that. I think typically as well just to keep in mind, you know, service trade is gonna make it really easy to access the information they need and record that stuff.

*--- Customer engagement ends ---*

DAN

50:35 So a little bit of coaching and they're... they're going to enjoy doing it that way instead of having to even think about it when they go home, right?

BRANDON

50:41 Yeah. I just was kinda hoping predicated workflow because it's it just pushes them with next steps. Like I gotta do that. I do have to update this and it seems ridiculous but.

--- *Forms* ---

DAN

50:57 Yeah... that's true. That's great. You're 100 per cent, right? Yeah. So you can restrict what they see.

BRANDON

51:08 Make it functional for what I'm trying to... trying to do.

DAN

51:12 Yeah. And there's also going to be warnings, right? If you require paperwork on certain types of services. So when it goes back to the office, if it's been check complete, they'll be a notification that says no paperwork has been added to this job, so you can... you can immediately catch them, right?

--- *Forms ends* ---

DAN

51:28 Catch those bad habits early. But I think if you, you're having a lot of issues with that, I would really recommend, you know, the first few weeks just not releasing that next work quarter, it'll be a little bit of micro managing to start. But once you get them in that habit, you know, it's typically good to.

--- *Deficiencies* ---

BRANDON

51:45 Yeah, I get what you're saying.

DAN

51:48 So once I reported the deficiency there in the field and I'm still on the clock out there on my job. So I'm gonna pull up my email. This is an email that you would get deficiency, report it. I'm just gonna click into this.

--- *Quote templates* ---

DAN



52:02 You might be having stuff or somewhere you're hanging out of the office here's. My report, all the pictures and information, job number, as well as the asset information location. So I've got everything I need. I can select an expiration date for the quote I'm about to create, but I really don't have to everything else is prefilled here.

BRANDON

52:21 Hello?

DAN

52:22 Go ahead and create the quote.

DAN

52:28 So, for this type of access panel replacement and I've got the asset information as well, so I can apply a... service template or quote template for the exact type of, you know, the amount of time and material it's gonna take me to accomplish this, prepare for the customer as well as the description of why this needs to happen.

BRANDON

52:51 Hello?

DAN

52:53 I've got my quote built. No, I'm not locked in here. If I need to make a last second adjustment, I'm more than welcome to also, the prices are going to be predicted by the contract here. So depending on your markup, right? And let me see if I've got one that's different.

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

DAN

53:09 There we go 300... depending on your markup for that customer, that's how the unit price is going to be determined.

BRANDON

53:17 Okay. Is there a way to break this out into? Let's say more of a proposal kind of thing. So I would say break up, break that access control as one section somewhere else was another. And then... and then whether or not I actually want to show them the one that applies and maybe just a total purchase price per section or... total... total. Is there flexibility unless?

DAN

53:51 So if you're adding, you know, six or seven different recommendations and you wanna kinda section at all?

--- *Deficiencies* ---

BRANDON

53:59 Yeah, you can send an...

DAN

54:01 Okay. Well, like I could add a second deficiency here. Just add a existing deficiency and select one. So I'll select one I had, which is quoted sprinkler head. And what I could do is group by service. So each service, right? Sprinkler head can have their set of items. Would that be what we're trying to do there? Or?

*--- Deficiencies ends ---*

BRANDON

54:28 I probably could work.

DAN

54:31 Might have misunderstood your question. I'm sorry.

BRANDON

54:34 You think of it like a residential, I'm gonna do some AB working best master bedroom, do some work in the living room right now, what it's gonna cost room, right? And so you're not gonna get a TV and this one's really good. You know, this amplifier, you know, that kind of thing. So they can quickly easily see it. But also, you know, whether or not they can... if I can find, you know, bought out by. So you can just do a price for the room. Okay?

DAN

55:12 Sure. Yeah. And so that would be the same kind of way, right?

*--- Assets ---*

DAN

55:16 So you could select for example, your assets like location, building each asset. You can label as, you know, downstairs cord or upstairs riser, room number four four... or label your service as such or put it in the description. So then each service that you're adding... is going to appear on a separate line with their separate. So, you see here we've got two separate services.

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

BRANDON

55:47 Yeah.

DAN

55:48 They're grouping with the items that go with them. And then we can present that however we'd like line item detail summarized by line item type, right? Grand

total only.

DAN

56:03 Would that work?

BRANDON

56:04 I think that I think we can make that work?

DAN

56:08 And there might be better ways to do it as well. This is what I'm thinking of right now and I might not be 100 percent understanding your... your question.

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

BRANDON

56:16 I think... I think you've got that. Is there a way to show the clients whether or not I want to give him my... my boss horrible?

DAN

56:25 Literally. So these six options here. So if I just want to do like I'll do line items with grand total only. So then it tells them the parks for each service, but only the Brandon.

*--- Quote templates ---*

BRANDON

56:34 Yup. Okay. Or I could do, and are you guys creating those?

DAN

56:40 So this is the six different options you have. You're gonna create your price list and your services and all that stuff, it's all going to be determined by what... what you have set up. But these are the six different types of options to present the Bill, if that makes sense?

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

BRANDON

56:53 Gotcha. Okay?

DAN

56:56 So, I could just do a grand total, only it'll just be one number.

BRANDON

57:00 Yeah.

DAN

57:02 But, but I'm all set here once I've gotten all my items on there and applied my services and I can toggle on and off that audio, for example, if we don't want them seeing that or any of the... the media will get the Philadelphia guy outta here. We'll leave Jordan.

BRANDON

57:17 Yeah, because this... this came from an efficiency, okay? Got.

DAN

57:22 I can toggle on and off media if I need to. And this is going to bring me to my company contacts as well as location contacts. So I can send this to as many folks as I want to. And I'll go ahead and get this out to the customer.

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

DAN

57:40 And are you in a spot right now where you can take a look at the... the quote?

BRANDON

57:44 Maybe we set up... a second.

*--- Assets ---*

BRANDON

58:00 Alright. And just came in.

DAN

58:05 And so you'll see I've got three services here for example, it could be, you know, alarm system back stairwell first floor sprinkler. So each different area has a service?

BRANDON

58:17 Yeah.

DAN

58:17 And depending on how you want to present that, that's gonna, I believe accomplish that, what you're...

*--- Assets ends ---*

BRANDON

58:23 Yeah. Well, and if we didn't select just great firewall and we had wherever you're calling them sections or services or whatever that on the right hand side, yep this will accomplish, it... it would convince our quoting right now offered a lot and I'll go through what else do we normally, which is great and it's gonna come through for, you know, each line item and stuff, but it's... it's our console care about, right? And then they just really want to know because we work on relationship most of it anyways. So they just want to know what the cost is and, you know, some details there, got it covered or ask questions around, you know, absolutely just, you know.

DAN

59:07 Absolutely. Well, what do you think of the quoting process compared to what you've seen recently?

BRANDON

59:15 I gave you about out of 100 above 75 percent. There's things that I would like. Well, I'm also very my... my thought, you guys are we looking at service? So I honestly think... it's all tied in for assets and everything like that. It's definitely something I can, you know? Yeah.

--- Quoting ---

DAN

59:38 And this is just one way to quote from deficiency reports. You can send out proposals multiple ways like to new customers, things like that.

BRANDON

59:47 Yeah. What I've seen, right? I mean, I know I've seen some things I'm like no way to, you know, we're not worried at all.

--- Quoting ends ---

DAN

59:57 Is this the best for quoting process that you've seen so far? Or?

BRANDON

1:00:02 No... no.

DAN

1:00:06 Who's got it be?

BRANDON

1:00:11 Wow... very simplistic, yes, very robust quoting application.

DAN

1:00:22 Okay. Well, let me see if I can improve our score here because I'm about to... to get into the good stuff.

BRANDON

1:00:28 Yeah.

DAN

1:00:28 If, if that wasn't good enough, I've got a few other things here.

BRANDON

1:00:31 I'm not complaining about this.

DAN

1:00:33 Yeah, no, I know. I'm just messing with you here.

BRANDON

1:00:35 But possible, please anyways, so, you know.

DAN

1:00:40 The same as getting a notification when your text sent that deficiency report. I also can see Brandon Fontane, just open the quote.

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

DAN

1:00:48 So I can see what's going on with my customer, how they're interacting with the information. I send them all on one platform again. So I'm going to get these email alerts, but I can also run reports into that right on service trade. I really don't have to use email if I don't want to, but it's very easy to get those alerts.

*--- Quoting ---*

DAN

1:01:05 Make sure you're not missing anything. I can bring up a quote page here. Just look at everything that was submitted and viewed submitted but not viewed. I'm wondering, hey, they looked at these, why didn't they approve them? I can bulk send out all of these again to the customer from service trade, not my email account. I can add a comment here to all of them at once... and go ahead and send them out.

BRANDON

1:01:31 Hello. Hi. I can just like, hey, just checking in to make sure everything's okay. Yep. Nope. Okay. Cool.

DAN

1:01:42 And so the purpose here is to make sure you're following up and delivering and achieving the revenue, right? So it's stacking up. You've got all this available revenue that you can probably tied into the next time you go to that site.

--- Customer engagement ---

DAN

1:01:53 Anyway. So that's how you're... you're getting more money out of each job you're going to or hey, maybe they are nearby there next week, just go ahead and stop by, throw that in and efficiently tracking what... what quotes you're sending out and following up on them effectively rather than, you know, calling around or wondering, right? So, so this is a huge thing for our customers and how they're able to... to drive revenue.

--- Customer engagement ends ---

BRANDON

1:02:19 Yeah, that... that works well. I mean, that's a very... very similar to kind of what we're doing right now movable, you know, emails corona.

DAN

1:02:30 Okay. So as far as like information come into the office and... and the way that... that flow back and I'm still clocked in out there, but I've we've got a quote, the customer in a few clicks.

--- Dispatch ---

DAN

1:02:39 You had mentioned, you know, some data getting lost in the transition. Is this, so this is no better than what you guys had now or?

BRANDON

1:02:46 Hello, this is Dan. Hey, Dan. This is way better. Okay. There's no doubt about that.

DAN

1:02:53 Okay, good. I just wanted to make sure I wasn't missing the mark too far here.

--- Dispatch ends ---

BRANDON

1:02:57 No, not at all. You know, the biggest thing is... is how other clients going to like. So I mean, not to say our goal, the operations clients and email support bouncing dot net. It's you know, our... our ticketing system then you've got, you know, then it gets created in... in your case would be a job whether it's assign you a client or not. I mean, right now, it says assigned for the designs through domain

name, right to the client. But is there a way, I mean you've got portal but is there a way for clients to send an email and for it to.. our... our... job... job list or something before?

DAN

1:03:41 So basically a service request and have it automatically create a job and notify you guys that they need this to happen?

BRANDON

1:03:47 Yeah, I think it doesn't have to be a client. They could just be in there sitting me, right? And then we got all of this is, you know, we gotta go take care of this or whatever. And then we decided to create everything, right? I just automatically in there would be nice.

DAN

1:04:06 And so, is this like a like, are they requesting service, something broke or?

BRANDON

1:04:11 Something about okay communication. A lot of times we get, you know, with the clients, they're like, hey, when you get some time to view this, I ever had an issue with us. Maybe you're you know, you go, what's this about? You know, they all, they'll know, you train them for, you know, 10 plus years, you support, you know, so, you know, multiple people, not just one person, right?

DAN

1:04:36 Yeah, sure. Yeah. So I think that... you know, I mean, I'm not gonna allow the portal is really great. So the portal can be, you know, huge for especially, you know, I mean, all of our customers really a lot of times, I don't recommend it until you're a little bit larger, but I think, you know, I'll let you kind of determine whether or not this would be the best thing. So there's two different options. We'll start here with the portal. I can either look at. So for example, I can look at all my locations as the customer. This is the customer view. So I'll just bring up Seattle.

DAN

1:05:12 I can look at let's see, I wanna look at one of my assets... a service. Now, if I know the asset, I can select it. If I don't I just do building, just come see me, right? Like you mentioned. So I'll just say, hey... come see me. I'd like this to get done by today. It's... it's urgent will mark them too. So we'll just go ahead and request straight from our... our sign in and this will be a window on your I'm... on your website. They sign in on your website.

BRANDON

1:05:51 Okay.

DAN



1:05:52 And it would fall first of all, you get an email notification, but it would also fall over here on your dashboard... up golf Seattle repair and I'm gonna click into the job here and you'll see... actually it's going to be this one right here.

--- *Recurring maintenance* ---

DAN

1:06:09 Service call. I did another one earlier all open up that job. See me, hey, urgent. And that's it says it's due on today. I've already got the location.

--- *Recurring maintenance ends* ---

DAN

1:06:24 We don't have an asset because they didn't select one on this one and the technician can label that when we had out there just gonna all building asset.

BRANDON

1:06:32 Or anything like that. Can we apply that I lose... SL law service level agreement? So we've got some clients where, you know, they got four hour response time.

DAN

1:06:46 Yeah. So you would want to try that into the contract and the mock ups and stuff that you set up with your customer as far as like... if you, they've got a yearly agreement that you have a signature for... you'd. Probably still be doing that the same way. And then you would just attach it to the location to document that.

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

BRANDON

1:07:04 Yeah, there's no alerts or anything if it comes in from that client for Seattle and we are so busy we needed to our response time and, you know, how many sleeping on the job today? And, you know, total alert when they get 10 minutes left to respond to these. There's nothing like that or.

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

DAN

1:07:25 You're saying when that red alert comes in, just making sure somebody sees it and... and does some about it.

BRANDON

1:07:32 Exactly that. I guess there's some things at, you know, actively happening with it because, you know, we have for our response time is one of our clients and it's... it's just for me, but at the same time, usually within that four hours, we responded within too because we're getting alerts already. Well, hey, I'll forgive me. And then,

you know, stuff on each shift, you know, three hours and 45 minutes like, hey, you better park and deal with this because you're gonna have a breach of us law, you know?

DAN

1:08:02 Yeah. So, are you, how are you doing it now? Is it like, how does that work come through?

BRANDON

1:08:06 It's in our software. So we're using thank you, sir.

DAN

1:08:11 Okay. So it's like the monitoring software?

BRANDON

1:08:13 No, that's not monitoring. It's. Just part of the part of VMS.

DAN

1:08:20 Okay. So they generate it and kinda send it kinda like we just did now. And then it just starts.

BRANDON

1:08:25 Yeah. I mean, so our clients is a crossover know anybody from crossover help with the cross overall email that's sent an email and it's not gonna go through a platform to help they're coming from. And then we have already answered that contact from Arizona from New York, right? And it automatically say, how can I help you? Hi priority they have as well? Whereas select. So if we come in and hit the ticketing system with that contract already applied to it, and this is just, it's not from already filled out. We just know that is in New York and we need to take care of business, you know?

DAN

1:09:11 Gotcha.

BRANDON

1:09:12 Email to our support address, it comes into the system.

DAN

1:09:15 So, nobody sees that email though. What happens?

BRANDON

1:09:18 We start getting emails, more and more emails throughout the day or the timeframe. And then we do not get alerts within software, no being or anything like that Bill... Bill. But... if you turn them off, but.

DAN

1:09:37 It just keep sending them like more... more frequently automatically, if nobody clicks it. Okay?

BRANDON

1:09:44 And that's how we set it up and we can have just having one paper period, but we wanted to, you know, like, hey, you got 15 minutes left there. You're going to breach, you know? And then, you know, we started the bulk email. Everybody starts getting them, you know, crazy, you know, usually we assign a, you know, account holder essentially who's going to respond automatically?

DAN

1:10:10 So, couple of different ways. I can think of it so similar. I mean, so they, if they email you, right? If they're just sending you an email... I guess I'm not quite wrapping my head around. So they just email your... your company's email and then it create something in the software.

BRANDON

1:10:30 Yeah, that's good. I can show you.

DAN

1:10:33 No, that's okay.

BRANDON

1:10:34 Yes, I am. I help you understand it's... it's. Basically, we have a service desk tab and you click I'm clicking into, I can explain it. I click tickets are going to dashboard, you know? So that will tell me I've got two tickets that are appropriate to ticket for waiting for customer or working progress. This now we've got 54 completed. You know, I keep going back and... but basically it all stems from an email incoming?

--- Customer engagement ---

DAN

1:11:09 Okay. So with the portal, they would generate it just like they did there. The other way would be emailing or requesting changes on one of your previous interactions with them or just responding to any of your communication, you would get an email. Hover, it's not going to generate, is not going to start automating it and sending it over and over to you. Again. It's not gonna do that.

--- Invoicing ---

BRANDON

1:11:33 Okay. So is there a way to get anything in the system through email? Or I would say we... we manually create the job in the system. We want to send an email for the client? What's that scenario look like? And we'll come back. Can we send it out of the system?

BRANDON

1:11:53 Came we receive it in the system? So we do have a thread in and out of a... of a software.

DAN

1:12:00 So, like all the jobs upcoming, you just want to send that, hey, we're this is coming up or?

BRANDON

1:12:05 I mean, let's just say Passover help in New York. I'm like, hey, you know, a quick question for you. Do you know what, can you check for me or what, what's the data on the battery? You know, in a lot of panel, you know, showing we replacing that or do you want to it's not part of your S, delay or whatever, right? I will send that through a ticket, either create a ticket or... or respond to one that you have put in and that way bread is just right there, you know, it's just amazing. People use Salesforce or Zendesk or anybody, you know?

DAN

1:12:41 Okay. So let's see here. I'm going to bring up a little bit more of a broad report because I don't have anything scheduled, but, yeah, so I can search for the customer and have this job and send out a service linked to them if I want.

BRANDON

1:12:56 I think you... you share your screen?

DAN

1:12:58 Yeah, stopped. So I was.

BRANDON

1:13:00 Okay.

DAN

1:13:02 Stop for a second is going to see if you wanted to share yours, but we'll get back to it here. Yeah. So I can bring up my appointments and then search a customer here and bring up all the jobs that we have scheduled for example or whichever status I selected.

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

BRANDON

1:13:17 Yeah.

DAN

1:13:17 And you wanted to just send them out like a reminder report of what's going on?

BRANDON

1:13:21 So, click that job or open up another window... you know, is there a service line?

DAN

1:13:31 Yeah. The service link, and if this job looks like I already completed this, otherwise, I could check the appointment... and the service link. So, for example.

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

BRANDON

1:13:41 Did you send any of the contacts and email just text not related to? Well, I mean, it can be related to a job that's fine. That's what it would be. But it just an email like, hey... confirming we're you know, on, for tomorrow or did you get those keys we need or, you know, that kind of thing?

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

DAN

1:14:05 Yeah. So comments I think is the best way to do that. So, if you're confirming an appointment for example, and you have a question, you can leave a comment for the customer, please reply here to confirm. You can have that automatically happen every single time you send one as well and see here, Philip Gilman, request changes, cost equals free looks like. So that's an area where the tech or the customer can comment and that'll show up as an email in your inbox, it'll also be an alert in service trade.

BRANDON

1:14:37 And the client will get an email, so.

DAN

1:14:40 Yeah.

BRANDON

1:14:40 And then I can respond to that email to come back into their, the comment.

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

DAN

1:14:46 No, they're going to have to click in. So, for the quote you looked at, for example?

BRANDON

1:14:50 Yeah.

DAN

1:14:51 So, I'll bring one up here.

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

DAN

1:15:03 See if I have one.

DAN

1:15:12 Yeah. So my customer, for example, this is an invoice or maybe a quote and I'm just gonna go view and respond.

BRANDON

1:15:20 Hello?

DAN

1:15:21 And I can request changes. Hey, this is bad.

BRANDON

1:15:26 Cool.

DAN

1:15:28 Okay.

BRANDON

1:15:28 That's the cool thing, I mean.

DAN

1:15:32 Invoice?

BRANDON

1:15:33 Yeah. Me, neither of those are a big deal. I'm just talking about communication.

DAN

1:15:41 Service report here. You can also just in the email. So I guess what are you, what are you hoping?

BRANDON

1:15:52 I have a history of that particular request from the client. So they would, you know, let's say they go to the portal, log in. They send a request. Hey, you know, I think I have an issue with this. You got... you got... you got, wow. What is it? Wow, you have the comments and it sends it back to them and they go. Okay, I'm gonna just email back and forth tied to that request.

DAN

1:16:28 I mean, if you respond to that email right right here, it's just gonna send it straight to me. Like if you respond to the quote, just email me back.

--- Quoting ---

BRANDON

1:16:36 It's...

DAN

1:16:36 Going to go straight to my email, whoever the salesperson was that created the quote for your team.

BRANDON

1:16:41 Then go back into that... that job... or that... or that, you know, opportunity or whatever your phone depending on.

DAN

1:16:50 It's not... not gonna do that. But the way that's gonna work... let me pull up my quote again here. Quote invoice service link, whatever have you.

DAN

1:17:04 By leaving a comment?

DAN

1:17:11 Or anything that they send to you on the comments, it is going to track the history of it here. So you viewed... viewed it, Dan emailed at. Dan, emailed it. Dan submitted it. Dan had a pictures, rubber, added pictures in the field. So, as long as they're using the, do you think they prefer to just write emails rather than just clicking in and looking at the.

--- Type of work ---

BRANDON

1:17:32 Yes, I have many... many clients and different clients like, you know, they got three employees to ones that have, you know, the government contractors are big and I've asked them. All right. Why would I want to do that? But I just over an email, you know... and... and this kind of goes back to be easy to do business with, right?

--- Type of work ends ---

BRANDON

1:17:56 We have events. They... they just go... let me know. And then, you know, we have a question. We send it back to them and it just the same thing, right? And, you know, I mean that's really, it, it's attached to the project, the ticket, the job, the using the asset depending on, you know, what the, what we're discussing, you know?

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

DAN

1:18:22 Yeah. And I think... I can... I can relate, I guess to what you're saying... you know, I think that I prefer not to be writing emails or text messages, you know, if I can just click in here, look at exactly what you're recommending quote invoice service link, whatever it might be. And there's an option to just add a comment at the bottom.

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

BRANDON

1:18:43 Yeah, right.

DAN

1:18:45 Permission. I...

BRANDON

1:18:46 Can appreciate that. But I mean, we have a few 100 customers and I can tell you we have two people who use the current... the current... and I would love for the music. You give us more information forms and stuff, but they don't...

DAN

1:19:07 Gotcha. Yeah, I mean.

BRANDON

1:19:10 Yeah, it's just one of those things. So that's the fund at the moment to figure out how to make that work.

DAN

1:19:15 Yeah. I mean, I guess, you know, if they're not willing to you. So if either you don't go with the portal, right? Or if they're not willing to press the blue button, and instead of writing an email, type that sentence into the comment?

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

BRANDON



1:19:29 Yeah. Yeah. I mean that's assuming it's a quote or... you know, a quote or, you know, something we've sent them, right? But yeah.

DAN

1:19:40 Quote invoice service link service reminder. Any of those can have comments or request changes. But yeah, it sounds like I think the best thing for you to be to give them the customer portal, in which case they could look over everything... and so they can look at anything that's coming up or anything that has just happened and easily this is all their equipment, right?

--- Assets ---

DAN

1:20:03 So locations and assets... I wanna take a look at loss, vegas. This is all my equipment. I can drill down and look at all the history, just this equipment.

--- Assets ends ---

DAN

1:20:16 Now, I wanna... I wanna talk about this job. So now I don't have to jump into email, I can just jump right in here... and... and I can email you. I mean, I'm... I'm happy to, it would just be on you guys at that point to add that comment to the work order, right? So if they're asking you, hey, you just came by the other day, you'd have to pay that together, right? Unless responded to the exact email that you sent them about this job. So if they're just typing up like your info or your regular service email, I don't think that there's really?

BRANDON

1:20:48 Yeah, that's the tricky one. Right there. It's just like I'm having the funny thing is I can't believe nobody else with asking about.

DAN

1:20:57 Yeah. And I mean, so what we found and we... we, so we work with over 900 customers across the y and Canada and I don't want to, you know, post my chest up too much here.

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

DAN

1:21:05 But, you know, we've... we've found a lot of growth and a lot of success. And typically our customers find that their customers immediately adapt to what service trade offers because I really don't think people want to be writing emails, want to be making sure they're replying and typing to the right person when you send them a report that looks like this has all that information with the time pictures files.

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

DAN

1:21:31 And I should have gotten a better one. I guess pictures files, forms and documents all on one page form. They're not, they're going to forget about email, I can guarantee you like we have 900 customers that do it. And I mean, I understand where you're coming from, but I wouldn't be too overly concerned about it is my point.

BRANDON

1:21:50 Yeah... I am... I am concerned though because that's how we've done business with how we've grown that's how, I mean, that's... that's our... our business is information, not fixing the camera. I don't give a shit about camera, you know, it's... it's all about communication with that quiet because that one Tam 1,000 bucks, whatever, hi, it's hundreds of thousands of dollars a year into just... just as bad as an asset, right? Not even a, you know, a part out there just from the us on that. And that's... that's where the ticketing comes in and it's not only save our bacon, also added value there, right? They... they know, they can go into that. If they do want the portal, they can log in and they just don't...

DAN

1:22:44 Yeah. So everything we've looked at today though until we go to this screen. So this, the portal here is something I'd have to log into everything else. They don't have to log into, click into these service links, right?

BRANDON

1:22:58 No, no. Exactly. Well, that's just for that came from email, right?

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

DAN

1:23:01 Yeah. They just click on that. They don't have to have any sign in or anything for that. And I mean, if they respond to that. So, for example, I'm just going to respond to one of these. I'm just gonna reply to a quote I sent earlier. Hey, need changes, let's find out if it actually does do better than I think it does. So that should hit my work email.

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

DAN

1:23:31 So, I've got a response here on the quote... hey, need changes and it's attached to the work order, right? So, you know, unless they're they specifically just don't want to respond to your communications and keep a thread like you said, if they just want to create something like this, and then I guess I'm wondering what situation would bring them to getting a message from you and then creating a new threat.

*--- Customer engagement ---*

BRANDON

1:24:00 I don't we don't typically, we're not engaging the client first if they have a nice, right? I mean, this is a deficiency. We are really there. Yeah, I don't know when their camera is not gonna work in any of the work or whatever, right? So that's where they're starting the conversation with.

DAN

1:24:21 Gotcha.

BRANDON

1:24:22 Yeah.

DAN

1:24:22 So, so what service trade does is... is it allows you to be the one starting the conversation because of the way you're able to collect data, the way that you're able to not miss anything that's on site. When you're there easily record that and send it to the customer, you're taking care of them before they're thinking about it. And... and that's... that's valuable. That's how...

--- Customer engagement ends ---

BRANDON

1:24:43 Really agree with that. But, you know, for some clients were just break fix, right? We're not engaging with pro... you know, I can with our, I mean, that's not all, but that's you know, a sizable amount, right? Not that we're not out there once every couple of weeks. For sure. It's just, you know, fix and that's how they're engaging with us. I'm not saying that... at least it... it pulls in the comment section, right?

DAN

1:25:19 Yeah.

BRANDON

1:25:20 It's action. Is there a... good time in there? And I'm like and I have to be, you know, for our eyes only, you know, is there a public or above a little check box that can make sure it's just for us?

--- Assets ---

DAN

1:25:34 Yeah, absolutely. Let's see. I'll... I'll go to my, go to one of my locations for this, but any comment that you put in or any... type of attachment, you can either say visible to everyone are only visible to your company. You can also make it visible to just technicians or just the billing department or just the scheduling department?

--- Access to information ---

BRANDON

1:25:59 You have permissions on that end of it?

DAN

1:26:02 Yeah, yeah. You can create your own permissions to. So it's... customers will see only what you want them to see technicians. We'll see only the information you want them to see, so on and so forth. But I don't wanna try to deflect.

*--- Access to information ends ---*

DAN

1:26:18 I don't I didn't mean to deflect you're... you're. Concerned about this by the way. And I think that there is... you know, there could be a better way to do it. And then I'm even knowing I was just trying to think, you know, hey, if you have an account email setup.

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

DAN

1:26:33 So like the user in service trade, if they're receiving emails, those service trade get works. And that's something I just wrote down to check into. I'll ask one of my customer success guys to see if that's a capability, right? Hey, this customer emails you. Since you have the customer's email address.

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

DAN

1:26:57 Let's see fountain, what's the domain again? Dot net, yep... misspelled your name.

BRANDON

1:27:09 Okay. I don't think.

DAN

1:27:11 Since we've got our contacts and that's the Google of service trade, I like to call it. You just kinda search for what you need. But since we've got your contact in there, if you're emailing one of our sales reps or one of you know, the company email on the service trade account. I wonder. I'm wondering and this is something I'm gonna find out for us if that's you know, we'd be able to tied to your account, be like, hey... without, you know, you haven't looked too hard. Hey, this customer, you know, is requesting service or is notifying you, so.

*--- Assets ---*

BRANDON

1:27:44 Yeah. And I think that would be, and I'm not gonna have zap year right now. And if I get an email from Gmail, I can do a label attachment, new email... email,

batching, a search or label, you know, pretty much anything. And I can create with you guys and asset assets, location comment the job, which is exactly kind of what we're looking for.

--- *Assets ends* ---

BRANDON

1:28:14 It just means I gotta do some other stuff on Gmail on the back end, but I can, I have problem at that location tag a job. I mean, I create a job there's all kinds of the year. So at least a fresh one coming in. I could get in. I can get it to you guys, you know, but carry on the conversation. I mean, I know my guys copy and paste that that's doable. It's the client, right? I just want them one thing like email, no, I gotta reply. I'm gonna go back here. You know, I'd rather try to keep it all in one place, right?

DAN

1:28:54 Yeah.

BRANDON

1:28:54 Well, I was thinking because my goal with all of this, sure. What about... like the change or something to something we've already signed a photo. How does that work?

DAN

1:29:11 So it, for a change order, what does that mean for you guys?

BRANDON

1:29:16 Somebody, they said, yes, we got there.

--- *Quoting* ---

BRANDON

1:29:19 We do find cameras, whatever. Now, I may... I may have another one here, 70 change order for, okay. Hello. Hey, we got into this right? Or whatever. So then we send them a change order. They have to prove it.

DAN

1:29:35 Gotcha. Cool. So this quote once you had approved it and I'm just gonna do it for us to... to save on time, but I'd get that notice.

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

DAN

1:29:45 I can bulk create a new job from this quote, but I'm just gonna do that here. And what I'm gonna do is schedule that. So we're only doing the services that we had

on here, right? Let's say they gave me a purchase order number.

--- Dispatch ---

DAN

1:29:55 It would autofill there. This job is going to create that work quarter with all the information for the technician. I'll go ahead and throw that on the schedule for today, just for example, and add Dan to it... that will appear on his list. And so the technician is getting that information as far as, hey... there's my new job.

--- Deficiencies ---

DAN

1:30:22 They tell him on site or her on site that, hey, we need to add to more camera. Okay? Cool.

BRANDON

1:30:28 Yeah, find something wrong? Do you said it was good? Is that, you know, like you get a new one, whatever, you know, so it could go either way. But yeah.

--- Deficiencies ends ---

DAN

1:30:40 I'm... I'm doing let's say that, you know, we'll just say those are cameras, for example, I can just add. Cool. You want 12 of them there's 12... you wanna do. And so I'm guessing you, so you want to know, hey, did I get this approved?

BRANDON

1:31:00 Yeah. I mean, essentially, I will be sending acquired another call to do the work, right?

--- Tech On-site ---

DAN

1:31:06 Unless, unless they're telling you that's what they want on site, in which case, you could just collect a quick signature to sign off on the updated work with. You could also just, instead of if you were saying something they said, hey, you said it was good, but it's not, we're going to need to do this to, then you would just jot down that efficiency if you needed to quote it to them.

--- Deficiencies ---

DAN

1:31:27 If there was no one there to, you know, approve it, then you just get that deficiency report, send it out to them. Say, hey, I need to add this to the job we're on right now.

BRANDON

1:31:35 Yeah, I'd be push that back on my... on my text that's out there.

DAN

1:31:38 Yeah. Hey.

BRANDON

1:31:39 Hey, by heart attack, the top there, but I guess I'd be created a deficiency report that, that's always the best way to go about it, deficiency report. That turns into an estimate, right?

DAN

1:31:52 Yeah. Well, so they would just tag and efficiency, add their.

BRANDON

1:31:56 Tied to... that. It wouldn't be tied to that job, right?

DAN

1:32:04 Yeah. I mean, they can add the deficiency to the job. They don't even have to send it to you, right? If they know what it takes to get it done.

BRANDON

1:32:11 Yeah, with that and efficiency, but they want an estimate then you can still be tied to that dog because that... that could be changed.

*--- Deficiencies ends ---*

BRANDON

1:32:19 That could be a change or, you know, that's... that's simple to do it that way that can be done.

DAN

1:32:24 So, how do you want it to work? You want? They're... they're on the job, they're completing the service and they're reporting and efficiency and you want it to appear, huh?

*--- Deficiencies ---*

BRANDON

1:32:33 Us, I guess attached to that job... and I need a quote, right? Another positive. Why can you send them a call back? Thanks.

DAN

1:32:45 All the deficiencies that get reported are always going to be tagged to the original job that they reported on.

BRANDON

1:32:51 Okay. That's... that's where I would go?

DAN

1:32:53 Okay. Yeah. So the deficiency?

BRANDON

1:32:55 So I can send an additional... based on the deficiency. Yeah.

DAN

1:33:02 So, this deficiency for example, it's on the inspection and I can even just create another quote from the same deficiency.

*--- Quote templates ---*

DAN

1:33:19 And let's just say we've got this approved. We won't even add anything to it, right? I can just add to existing job here. I am 615 that's the job that it was reported on. The quote is associated with. Let's see, we're actually, the efficiency would show us where the quote came from. But we know from our last page that hey, let's hit create a new job, add to existing job.

*--- Purchase decision ---*

DAN

1:33:48 Is that, would that work?

BRANDON

1:33:50 I think, I mean, obviously, it's something I'll have to play with it, see how it works its way out, but I think it was.

DAN

1:33:58 Okay.

BRANDON

1:34:03 Let's see what else I have here. I don't wanna take up too much more your time right now.

DAN

1:34:07 Well, I'm happy. I was about to say I do have one last call here coming up at the top of the hour or 15 of, but I know that, you know, you might need to see a few



more things or review some stuff, and I want to get an answer to us with a little bit that email conversation... to see if there's anything I missed there. But overall, what... what would you say your level of interest is at this point?

BRANDON

1:34:32 I'm interested. I think there's some stuff that I feel like we need because we're if we're making a switch, I feel like it needs to be worth it.

--- *Type of work* ---

BRANDON

1:34:43 But I also understand that... maybe thinking about four o'clock on the project side of things and that's not what you guys do. It's not what you were built for.

DAN

1:34:56 I think that... that the one thing that I've noticed is that, you know, specifically with the email conversation that we got into was... that it sounds like that's reactive service right in. And while we handle reactive service and, you know, you can easily dispatch it on the schedule board. Obviously, everyone the to the service has some type of reactive service, right? But our customers are really, they use service trade to get out of the emergency service business to get out of the constant request because those can be disruptive and they're difficult.

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

DAN

1:35:30 I mean, you mentioned, hey, somebody is going to be, you know, on your back if you don't get out there and four hours, I would hate to have that hanging over my head every day. Why I just?

BRANDON

1:35:38 Hello... please? Okay. Yeah.

DAN

1:35:44 Yeah. Well, that's always the ticket, right? Yeah. But do you think they, you know, you... you said make it easy for the customer? Do you think they even like having a report? Repairs? Do you guys?

BRANDON

1:35:54 Well, I mean, I don't know how the ones... that we know that we, you know, remotely services, Arizona, we're going out there every day to check their doors, you know?

DAN

1:36:07 If you sold them on a monthly checkup to where you're going to check every single item that you guys service to make sure it's not getting close to break.

BRANDON

1:36:15 Yeah. And we do that in... in California. Okay. The problem is... is that, you know, when that... that was on lock, that they, that's the call, you know, I don't foresee a way to make that go away.

DAN

1:36:32 Gotcha. Yeah, I mean, yeah, I mean, those things are always going to happen, right? Like... like I said, everybody's going to have some emergencies but I guess limiting those... is... is the way our customers are... are seeing a lot of their returns, right? So, so, I think, you know, it'll be your choice to try to sell more preventative maintenance, more inspection type service where you're trying to catch those things, show them why it's valuable to have that done. Because, hey, you're not gonna have to email me and have somebody rush out there.

BRANDON

1:37:04 Yeah. I remember we were working on, so rather start subtract the date for pretty much the exact same thing. No problem. And it's monitoring stuff too and it's which is fine. But, you know, when the reason we got to this position because they were easily able to, you know, all of us and we, you know, we... because we... we have to jump out within you take care, right? Yeah, those are expensive. Well, when he wants to do you got it, you know? So, yeah, I can't really say, I think that, I guess I gotta figure out how we get around a couple of things but, you know, work with is more appropriate. And I mean, I do like it. I, and I'm...

BRANDON

1:38:00 Sorry, I heard somewhere, I don't say my name and walking around with... yeah, it's... actually really do like it. I think it offers from Symplicity to my life.

DAN

1:38:18 Well, you know, you're not gonna hurt my feelings, right?

BRANDON

1:38:20 No, I'm not a fan at all. I'm just typing in front of the process?

--- Accounting integrations ---

BRANDON

1:38:25 Yeah, I like it. I honestly say your... your web desktop, you know, I think I didn't do anything ServiceFusion whereas you guys, is there's definitely some more functionality that we can use over? Okay. Yeah. No, that's assuming that it actually function boy?

DAN

1:38:49 And it may be... you know, I, I'd be interested to... to hear about what those functions are.

--- Purchase decision ---

DAN

1:38:56 You know, if you wanted to kinda shoot over a list, if you did wanna reconnect and look at this again. I don't know how quickly you're looking to make a decision, but we can definitely chat again once we come up with what we need to focus on.

--- Purchase decision ends ---

DAN

1:39:08 I guess what is most important. But yeah, I mean you're not like I said, you're not gonna hurt my feelings if you say this isn't the right way to go for you. I guess I just wanna make sure I'm you know, we were geared for the preferred of preventative maintenance and service type deal.

--- Accounting integrations ---

DAN

1:39:22 So a lot of, I think some of your workflow a little bit. It's not necessarily what silver service trade is built to do that. Would you use it to do that? Sure. I'm sure you could. I think that's kinda what you're thinking through as well. So are the benefits on one side enough?

--- Accounting integrations ends ---

DAN

1:39:39 And is it easy enough to... to still accomplish those other things right? That they're important to your business to make it worth it? But yeah, I mean we've really just scratched the surface as well. We didn't even get to scheduling or an invoice really. So.

BRANDON

1:39:54 Schedule real quick or calendar that's just...

--- Dispatch ---

DAN

1:39:59 You what I'll do because I really do have to go in like four minutes and scheduling is a we've got a dispatch board as well as the map based scheduler. I've got a couple of videos prerecorded that I... that I created that'll kinda take you through a few different options.

--- Dispatch ends ---

DAN

1:40:12 So if it's okay with you, I'll just attach those to an email for us and send that over to you as well as let's see. I've got a few things I wanted to follow up for you. Which one of them was the email... thread that we're talking about and whether that could kinda tied into a customer and service trade automatically. And then what... what else... what else is going to be important for you to want to continue to evaluate this sort of want to move forward with service trade?

BRANDON

1:40:40 Yeah, I think, yeah, I mean you can't you get the email one. I think that's one of the bigger ones. I think for us, the quoting aspect of it. I think you've got, I'm... moving my list. You... you definitely touched on most of the things. I should have been taking notes on the things that I had a question.

DAN

1:41:02 Well, and I've got a recording of this too. I'll send that over. I'll kinda...

BRANDON

1:41:07 And I make a list based on, you know, all cruise through, figure out what... you know, what questions I had. Yeah, that would be perfect. Hearing is going to be a recurring revenue, you know, our... our billing quarterly, monthly, whatever Olive handle... you know, and then obviously inventory, you know, we kind of touched on that a little bit, I guess.

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

BRANDON

1:41:30 But I mean, do you guys integrate with any suppliers or anything like that, you know, promote or do we create our own database?

DAN

1:41:40 So you can set your vendors up and like what you pay for... for items and prices for those vendor. Sure.

BRANDON

1:41:45 Okay. Yeah, that's fine. Thinking it was going to be fine. Okay. Yeah.

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

DAN

1:41:55 Hello?

BRANDON

1:41:56 And... and I'll... I'll... go from there. Yeah, no, you're interested. I don't want to seem like I'm not, I just, I think I just analyzing it as we go.

DAN

1:42:09 Yeah, sure. Absolutely. And yeah, I mean, I wish I had more time. I really do and I'm happy to do another one of these, right? But... but I just gotta jump into another call to just close out the day here. Hey, it was really great meeting yet. I think it would be great if you did have, you know, a few questions and... and I'll send that recap over here in the next couple of hours.

--- Purchase decision ---

DAN

1:42:28 But if you could put together kind of have a list of maybe important things that you think we might have missed or are you still were unsure of and just determine whether or not, you know, this could be a great fit for you. Sometimes the questions you might have would be easier answer by some of my colleagues so I can kind of bounce them off of them and get you the best response. And then if we want to, we can reconnect and take a look at this again. How's that?

--- Purchase decision ends ---

BRANDON

1:42:52 Yeah.

DAN

1:42:54 Okay. And I am pretty much unfortunately booked up pretty much to Thursday and Friday, so we'll probably have to be Monday anyway. So we'll try to communicate a little on email and take it from there, if that works for you.

BRANDON

1:43:05 Okay. I appreciate it.

DAN

1:43:07 Yeah, absolutely. Thanks a lot, Brandon, I really appreciate you... you meet with me today and learn more about this and I'll be looking forward to chatting with you.

BRANDON

1:43:13 Right.

DAN

1:43:15 Yes, sir. Thanks.

BRANDON

1:43:16 Bye.

*The End*