ServiceTrade Demo with Thermosystems, Llc.

Brooke Caskey with Thermosystems, Llc.
Recorded on 11/23/22 via Zoom, 1 hour 4 min.

Participants

SERVICETRADE

Brooke Caskey
Territory Manager

Chuck Dunham
Field Manager

Charlie Riddle
SDR

THERMOSYSTEMS, LLC.

Tracy Dorman
Owner

Topics

Transcript

BROOKE

0:00 Hi Tracy. Hello? Hello? Yes, I can hear you. Well, perfect. I can hear you. I see a black, I, it looks like your camera or might be covered off if you were trying to turn your camera on. Well, no, my.

TRACY

0:19 Tops close. I'm working off my big screen right now.

BROOKE

0:22 Okay, cool. Perfect. Are we waiting on anyone else on your end?

BROOKE

0:32 I have my counterpart, Chuck. He'll be joining us any minute. Now, he works closer to your area. And so he's one of the people that, you know, if there's over the need for an onsite visit, probably send Chuck ups to you. Okay? And then he's joining, right?

CHUCK

0:49 Now.

CHUCK

0:55 Hello?

BROOKE

0:58 Hi, this is Tracy. We just going on. You didn't...

CHUCK

1:02 Hi, Tracy.

BROOKE

1:03 Hello? I'm Tracy, I have you down as the general manager of service, right? Title for you.

BROOKE

1:16 Good, Eric. He said that was right?

BROOKE

1:24 Hey, we can see you. Okay. Cool. And so quick introduction on our end. So, my name's Brooke. I'm the a territory manager here at service trade. And with me, I have Chuck dot M, he is my outside counterpart. Like I was mentioning the person that's going to visit you all in your offices, things like that. But really my goal for today is to take a walkthrough service trade.

--- Purchase decision ---

BROOKE

1:49 I understand you are familiar with us, but take a walkthrough, maybe show you some of think things that are different since last time you saw us. But before that, I want to talk about your processes and where you see some room for improvement. And then from there, we'll take a dive into the platform if that sounds like a plan.

TRACY

2:08 Absolutely.

BROOKE

2:09 Cool. So, I understand that you got in pretty deep with us back in 2020. I think you met my VP, Tim spank, in your office, right? Yeah. So before we kind of get into things, I am curious what's changed since then, and it sounds like you're back on the market ready to make a change. So why are things different now?

TRACY

2:34 So, well, I was ready to make change two years ago and the president of the company at the time didn't wanna make a change. I'm... not even sure why other than they didn't wanna make a change. So, he had some different financial goals and stuff and bonus programs with dyke and... that I think we're a hindrance to him.

--- Purchase decision ends ---

TRACY

3:06 Let me make that move. So, he since retired a couple of months ago and the new leadership here with the new president, who I report to is all on board for, hey, what do we need to do? Because, you know, I've been charged with growing this organization and doubling the size of it in the next to an half years as well in order to do that. I need the right tools in place to do that. And the current tool tools that we have in place that's just not gonna happen. It's an unrealistic expectations. So, he understands that he's all on board. And my goal between now and the end of the year, calendar year is to have a software partner selected.

--- Implementation and ongoing support ---

TRACY

4:02 And then between January and March 30 first, which was the last quarter of our fiscal year that the system fully implemented, ready to go. Everybody trained... hit

the, you know, road running on April first 2023. So that's where I'm at.

BROOKE

4:24 Okay. Gotcha. Well, that timeline you're with that time line, you're certainly looking at the perfect time right now because right now companies that are making a decision, let's say, you know, this week, their implementation is beginning in January and they're kind of target go live date is April so.

--- Implementation and ongoing support ends ---

TRACY

4:42 Right.

BROOKE

4:48 You mentioned that you've been tasked with doubling your is, are you tasked to doubling the revenue? The size? What do you doubling in the next two years? What goes into?

TRACY

4:59 So revenues needs to double. And part of that is we can double without doubling the size as far as quantity of people.

--- Pricing ---

TRACY

5:09 I can still double our revenue without it's not going to be a one plus one equals two. It could be a one plus one equals two or it could be a one point seven five plus one equals two. So we have different roads to get there, right? And that's part of the software platform selection process is what tools are available to us.

--- Type of work ---

TRACY

5:36 Obviously, I'm a firm believer and let's do more with less. So that part of the process for me is you find a platform that will help us do more with less... service technicians are difficult to come by. We are also expanding what we call our turnkey programs which is essentially small Construction projects, right? That's what avenue where I can dramatically increase our revenue without doubling in size? Like because we subcontract out virtually all of that work. So that's an important part of this selection processes, tools for the Construction part of it. And what I'll call it is all call on Construction like because just like I said, we're sub, contracting out the majority of this work. So... but that's where we're at.

BROOKE

6:33 Cool. So you mentioned that you're in your smaller Construction projects that the turnkey work when you say small, could you give me an idea of like the length or the amount of time they might take? Just so I can.

TRACY

6:46 So I'm gonna say I'm not going to give you a start to finish because that would include the manufacturing equipment which right now is everybody knows. I mean I can take a year right now. So leaving that out of it boots on the ground actually on site. The longest duration would probably be six months. Most of these jobs are done in 30 to 45 days. So pretty much to billing cycles and more out more than.

BROOKE

7:16 Well, yeah, six months or less is definitely something that we can handle. Probably one of the biggest differences from the last time you looked at us, we've really strengthen our hand on the project management, Construction and style. Small project and the things.

TRACY

7:32 And...

BROOKE

7:33 So it's not something I have prepared to present today.

--- Type of work ends ---

BROOKE

7:36 But Chuck here does have a really helpful video outlining the project management side. And so we could definitely help with that.

CHUCK

7:43 Okay. We can send you that recording.

BROOKE

7:46 Yeah.

TRACY

7:47 Be great.

BROOKE

7:49 Cool. So in terms of executing on your growth over the next two years, it sounds like the main sort of initiative to do that is selecting a better software. Is there anything else that you're doing to achieve that?

--- Implementation and ongoing support ---

TRACY

8:02 I mean, we're obviously expanding, you know, our technician base hiring technicians. And also, I was gonna require for me to bring on a full-time project

manager for the turnkey work and another coordinator to help support the additional field staff. So, yeah.

BROOKE

8:23 Lots of exciting things happening.

CHUCK

8:26 The rows.

--- *Type of work* ---

BROOKE

8:28 And then in terms of the type, your work type of work you're doing, I did look at your website, but I just wanna make sure that I have a good idea. I saw plan maintenance service work, tandem jobs. We just talked about your smaller turn key projects, all of that kind of cover everything. Did I miss anything there?

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

TRACY

8:45 Yeah. So, so Thermosystems is a diet can service alliance partner. So Diane is the world's largest HP AC manufacture. We are not the largest here in North America, but worldwide they are. So that's one of their big growth goals is to dominate the north American market, which is gonna take a long time because you have people like jci train carrier obviously who've been in the marketplace for a long time.

--- *Type of work* ---

TRACY

9:14 So, and obviously our biggest competitors are trained and jci. So jobs controls. So we are a majority owned by day. Can they don't 70 percent of Thermosystems but they're not involved in the day to day operations of the organization. So not only do we, do, you know, Tina, we're plan maintenance work, turnkey were quoted service work. We also have… a large part of our business, probably about 25 percent of it's doing startup and warranty work for our data. Not only our Diane equipment that we sell, but also all of our other manufacturers that we represent because we represent, you know, 25 plus manufacturers. So big part of our business.

--- *Accounting integrations* ---

BROOKE

10:07 Gotcha. Okay. Yeah. I did see now that I look, I do see a note for Charlie about the startup and warranty work. And then in terms of your current process, it sounds like you guys are still using the job costing with the mobile resource manager, and then the visual contract accounting that's all one package for you, right?

TRACY

10:30 Yes.

BROOKE

10:31 Okay. And then he mentioned that you use to other accounting systems but I only see one listed. I see Computerease for the parts division is clear. Another one or am I misreading?

TRACY

10:43 Hello. Yeah. So Computerease is actually the, our primary. So we're a three headed monster here at Thermosystems so we've got the applied equipment sales side who sells the equipment to contractors.

--- Accounting integrations ends ---

TRACY

11:00 And then we've got our parts department, which sells obviously direct to owners, director, mechanical contractors, and other service companies, right? And then we've got the service division which is under my purview. So each one of us have our own accounting systems, but currently our systems all roll up into see. He.

--- Accounting integrations ---

BROOKE

11:26 Okay.

TRACY

11:26 And which is what I would call the Thermosystems primary accounting system. And that's how we do all of our financial reporting up to Diane, because we have to report monthly to Diane. So everything rolls up and integrates into CE, and then all of our financials go to Diane through see, but our parts department has... their own software that includes their own accounting platform which I believe is called activate.

--- Parts management (inventory) ---

TRACY

12:00 I think that's it. And because you have a huge, you know, they sell and stock, you know, millions of pieces, parts and pieces. So they have a large inventory. So, yeah, 99 per SE.

--- Accounting ---

TRACY

12:14 I believe that's what it's called to activate. So that reports into see. And then currently visual contract or job cost, and they have to do that manually with a, an

excel spreadsheet. And then they have to enter that hand in or that in the seat. So it's not an easy process right now.

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

BROOKE

12:37 Okay. Gotcha. So the service division, if someone using the visual contract, correct?

TRACY

12:43 Yeah, visual contract is part of, so job costing has mobile resource manager and visual contract, visual contracts, just the accounting portion of mobile resource manager.

BROOKE

12:57 Okay. Gotcha. And then what the sales division, okay?

TRACY

13:02 The equipment sales division uses. See. So Computerease.

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

BROOKE

13:05 Okay. So, in terms of because I know last time part of the discussion did involve around, you know, a marriage between Computerease and service trade.

TRACY

13:16 This...

BROOKE

13:16 Time, is that the same case? Like we?

TRACY

13:18 Yeah, it would be beneficial but not mandatory.

BROOKE

13:24 Okay. Okay. And then it looks like right now for your quoting? You've set yourself up some templates in excel that you're going off of?

--- *Accounting integrations* ---

TRACY

13:37 Gosh, correct? Is there a?

BROOKE

13:38 Reason you're not quoting and any of the other systems you're using?

TRACY

13:42 There... there are too cumbersome mobile resource manager has a quote tool. But just like I said, it's a sequel server based program. There's no templates in it. It's just not built for what we do. So we don't use.

BROOKE

14:01 Okay. So you might be looking for maybe a, an easier means of quoting and getting cold?

TRACY

14:06 Absolutely. Yeah. The new software tool will have to have the capability to do all the quoting, obviously all the dispatch and then obviously invoicing, we prefer to be able to invoice out of the, this program, not an accounting program... just because of the ease of use.

--- *Type of work* ---

TRACY

14:28 And then obviously the other big requirement it's going to be the ability to manage Construction documents, you know, AI built Progress, billing, so on and so forth on the small Construction projects.

BROOKE

14:43 Okay. Cool. Well, we can definitely like most of those.

--- *Purchase decision* ---

BROOKE

14:48 The only thing that we might need to send some additional information after it's just the Construction piece of it. I set up a demo Lauren service today if that's okay.

TRACY

14:58 Yep. Absolutely.

BROOKE

15:04 Now... pull to make a decision by end of the year. Okay? We can work with that. So who else besides yourself here involved in coming to a decision? Let's say we go through this and, you know, you feel really positive about it. What would be, what would be the next step from there?

TRACY

15:25 For me, the next step would be... definitely deciding on what accounting, right?

--- Accounting integrations ---

TRACY

15:34 Because nobody we're talking to have accounting included, right? It's just most of these platforms don't offer it. So this, you know, we're not opposed to going back to Quickbooks. Right? Our CFO is in opposed to that. Either one of the requirements here's what. So, let me just tell you what we've talked about internally.

--- Accounting integrations ends ---

TRACY

16:02 Whereas before the previous president was like, well, you know, I'm not moving off a CE every something's going to have to be compatible with CE et cetera. Well with his new president. And we've now formed a leadership team that meet regularly has goals regularly. I don't even think see he is going to be around here.

--- Purchase decision ---

TRACY

16:25 Long-term I just don't so basically what I've been told is, hey, don't try to Jama, you know, a square Peg in a round hole, what does not work software platform on your end? That's going to have to be compatible. We'll see when I don't even know if we're going to have see in a year and a half or two years.

--- Accounting integrations ---

TRACY

16:45 So I have the flexibility at this time to look at several different accounting systems. So really it's going to be what is the marriage look like between the software platform I select and an accounting partner that makes the most sense with that platform. So the next step would be... I would probably, I know all the questions to ask for my team, right?

--- Purchase decision ---

TRACY

17:13 I've been doing this for a long time. And then the software selection been going on for two and a half years. I narrowed it down to, you know, three different platforms and those are the people I'm reaching out to. Again, you guys being one of those. So I know we're looking for. So the next step would be just maybe final confirmation with my team that way if I missed any questions, they can ask some questions. And then just like I said, my clock is ticking, it's the end of the month and I've got 30 days with the Christmas holiday thrown in there to make a decision. So.

--- Accounting integrations ---

BROOKE

17:53 Yep. Yeah. I'm curious. Well, let me pop up first. You should know that we do have connection conductors with Computerease and Quickbooks. So that side really won't affect, you know, our side of the evaluation too much because we can do both to you. What I will say is I have heard that it could be a lot to take on to switch accounting and service at the same time, just something for you to keep in mind... especially with the deadline that you have.

--- Accounting integrations ends ---

BROOKE

18:23 And I'm curious, you know, what would be the, I guess the consequences, the only word I can think of if you were to be late on that.

CHUCK

18:32 So.

TRACY

18:34 Well, I would envision is obviously for a certain amount of time, we would have to be still operating within mobile resource manager and the C until we had all the data transferred. I mean, so basically, we'd have some overlap, right? And until we knew we had a go live date and then obviously have a go live date whenever that may be. But we can certainly operate within the two systems for a certain amount of time. But unfortunately, VC is not going to be compatible with anything. It's just not. And nor do we want to stick with the, see if we're moving off of mobile resource manager, which we are a V sees gotta go the way the dodo bird, so.

BROOKE

19:27 Sure. And then what were the other systems you're looking at besides service trade? You said there was three of them?

TRACY

19:34 Yeah. So service trade, BuildOps, and then Salesforce service cloud?

BROOKE

19:42 Gotcha. Okay.

TRACY

19:44 Is Diane has a relationship, long-term relationship with Salesforce? So we might have an opportunity to leverage that relationship. So those are the three platforms we've narrowed it down.

BROOKE

19:59 Yes. Okay. Cool. Well, I feel like we can go ahead and get started here on this. Is there any questions that you have?

TRACY

20:07 No, we are good to go.

BROOKE

20:09 Perfect. And I appreciate the background information since I was involved in the last evaluation. Okay. So before we get going with it, so I have a few refresher slides for you, I know you're familiar with us, but really to highlight service trades value proposition for our customers, can you see where I have my slide here at mine and checks name at the top. You can Chuck, do you see it?

CHUCK

20:40 Yeah, I can see it.

BROOKE

20:42 You don't see my... rooftop unit, Tracy. I'm moving. Okay, cool. So service trade, we got our start about a decade ago. Recently, we just earned are a 1,000 customer which is really exciting for us. But for the past 10 years, service trade has been exclusively focused on commercial service contractors like yourself, better your business. And so the reason that service trade was formed in the first place is because our CEO really Marshall, he saw that there was somewhat of a disconnect when it comes to your team and your customers and your customers really understanding the amount of great effort and work that you're putting in for them. So this in mind, Billy want to build a system that not only would streamline processes internally but would allow you to put your best foot forward to your customer, impress them, maintain those relationships and turn, grow your service business.

CHUCK

21:40 Okay.

BROOKE

21:41 So we're always looking at our customers data here and we found that our average growth rate across our 1,000 or so customers is 25 percent annually. So that's our flat average across the board. I'm looking at some of our top performing customers. We have companies that grow at rates as high as, you know, 45 50 percent and then beyond that annually. So of course, with them, we're going to study them. So either data and studied their success and say, okay, what do we attribute to this level of growth?

--- *Customer engagement* ---

BROOKE

22:08 Right? And we found that there's three ways that service trade helps. So, the first one and I think this is going to speak to you specifically is through operational efficiency, making the most of your current resources to optimize revenue opportunities. So this could mean something as simple as utilizing your current team

of technicians as you perhaps are hiring and growing but using that current team to set them up for success, get them out to more jobs, more job opportunities.

--- Assets ---

BROOKE

22:36 One really great yeah. A couple of how we're sending technicians up for success in the field is through asset or service history, the ability for your technician to click on, let's say a killer and click and see the full scope of work of everything that's been done for every picture taken, which technician was on the job, notes left, deficiencies found, and anything that they need to know.

--- Customer engagement ---

BROOKE

22:57 And this helps set your technician up for success when working with your customer. And so that's definitely something we want to highlight for you today. Then with your customers, we want to help you of course, make the most of your current relationships with them. I'm sure you're already doing a fantastic job at this. But even so, we want to provide you even more tools to do this things like a customer portal or sending notifications to your customer that pay the technicians on the way. They'll be there in about 45 minutes or a detailed post service report, wrapping up the job, showing the pictures, the videos, the notes left, so that everyone's on the same page.

--- Deficiencies ---

TRACY

23:33 Right.

BROOKE

23:35 And then finally we have deficiencies. So deficiencies are a huge deal and service trade. When I use that term today, I'm referring to any sort of issue maybe found on the equipment, but we wanna make it really easy for your technicians to document deficiencies or issues found from their mobile work quarter, have that documentation relate back to the office in real time with pictures, videos, audio memos or whatever the case may be.

--- Customer engagement ---

BROOKE

24:00 That way someone like you who's doing quoting in the office can take that deficiency, review the report generated, flip it directly into a proposal, get that sent out with pictures and approve button for the customer to engage with. And that jobs you know, approved for, to go, you're ready to do that work and increase your revenue that way. Yep. And to give you a, an idea of sort of what that return could look like at a conservative level, I've taken your 15 technicians and I've said, okay, if we can help you help your technicians create just one more job per week through identifying deficiencies. And, you know, streamlining the quoting process.

BROOKE

24:39 Let's say 500 as a conservative, a middle ground for your job cost 35 percent margin. The numbers really speak for themselves. Okay... awesome. So so far, does that still sound like service trade would, you know, align well with your goals?

TRACY

25:00 Yeah, I'm not worried about any of that.

--- Dispatch ---

BROOKE

25:04 Okay. So I thought today, we could do a quick refresher of the office, but we'll spend most of our time in the tech view, of course doing a job together. But starting here, we have our service dashboard and I like to start here just because it's the landing page for you when you log in, of course, you can see your daily schedule, type of work your technicians are doing, where they're going. And then from there, we have that helpful checks and balances system. So being able to see the fact that you've got overdo jobs to them without appointments, and then jobs to you soon in the next two weeks without appointments, allows us to be proactive on scheduling, avoid missing any recurring, easy guaranteed revenue for you?

TRACY

25:45 Hello, tonight. Ask a question real quick. So this is... do you guys have a dashboard or a calendar that is a weekly calendar sorted by technician?

BROOKE

25:58 We do. Yep, I can show that to you. Yep. Yeah, that's about to stop. So bear with me.

TRACY

26:04 Yeah, that's fine.

BROOKE

26:05 And then down below five past jobs to be mark completed. So this indicates the technician has done their work in the field marked as such. But of course, checks and balances, again, the office we're going to have them review as well, make sure there's no spelling errors, no steps where for forgotten you'll know that some of these jobs here are flagged read. So I can indicate deficiencies in that to you would be a visual queue. Hey an issue was found that this job. Have we gotten a quote sent out probably border parts for this? What's the status there? Because right there, there is additional revenue waiting for you? Okay? And then down below, we have completed jobs to be invoiced.

--- Recurring maintenance ---

26:42 I don't think you'll ever have as many as me, but we still want to help you keep track of all those building opportunities. Sure. So that is our dashboard. And then before we get an, the scheduling aspect, one thing to highlight here is a customer location pages. So your customers will live in service trade and you'll store their data in service trade in terms of the work that you're doing for them, right? So we have our, I hop today. I put you in as our owner and it was like I hop, we do the following services. So the examples I have here they hop into all be... like recurring style work, but you can of course set up like a one time project or install jobs using this. So if I click into one of these, you can get a good idea on how that might look. Okay. So each service is going to be tied to an asset. So in service trade terms as a reminder assets. So your customers equipment, you're gonna have your description, parts, labor, an items, preferred technicians, price, duration, whatever you need to know.

--- Assets ---

BROOKE

27:46 And then here is where you can dictate is this over a repeating service? Or is it a one time maybe installed project? So that would land here. Does that make sense? Yes. And then for the rest of location page, of course, keeping things are keeping track of things like job history in chronological order for you, your customers equipment, those assets we'll dive into that more on the fields here, but being able to narrow everything down by specific history to deficiency quoting history. And then small details for you and the technician like the ability to leave maybe a recurring comment with the door code or a good parking space to park into. So that you're not needing to communicate that each time.

BROOKE

28:35 Any questions so far?

CHUCK

28:38 Today to do that so far?

--- Recurring maintenance ---

BROOKE

28:42 So over here to touch a bit on the scheduling portion of things. So keep these services in mind as we go to this next steps. So this next step here, we call it service opportunities and this is how you can forecast what's up ahead or you can see what maybe you've missed if it's overdue but you can indicate a date range for the report and say, okay service trade, show me my job is due in three months or two months or next week or whatever it may be for you. And it's gonna pull that from those location pages. So if I take a look at fox road elementary here, I can see that in February. I have the following services. Do it's gonna grow together if there's multiple and that's gonna pull in the description parts, labor an items, everything we need to know about that job and we can go ahead start creating work quarters. So in theory, you could run a report of all of your recurring services and bulk create work orders all at once based on the dictated job type. Now, I'm gonna save some for my other friends here, but I can go ahead and create, let's say free. Does that make sense that's fun?

BROOKE

29:50 Nope, those jobs are now created and are gonna fall over here onto our I'm not based scheduler and I'm zoomed into to North Carolina here, but you're obviously going to be zoomed into your area of service. And you can see that over on the left, you've got your technicians. You'll just have your one nice neat office but each technician is represented by a color. And so that's how you know, who's on the job. So in terms of efficiency, you could say, hey, we're going to put our purple texts, you know, in the southern part of town are green text in the northern part. Let's make sure no one's crossing wasting wind chill time. So I want to call your attention here to this job. You'll see that there was a pin there but it is gray indicating that have an assigned that are scheduled it for everyone for anyone. So I'm gonna take a look here, okay, PM at pta towards I'm gonna drag that two day here. I'm because I see he's right next door anyway. And then once I know when I want to send, Dan will send him right after that other job on Saturday and dispatch to him. So here's the weekly view you asked about and you can narrow this down and filter it by specific technicians. Yeah.

TRACY

31:04 Gotcha. Okay.

BROOKE

31:06 So, any questions about that scheduling process are pretty self explanatory?

CHUCK

31:13 Hello?

BROOKE

31:13 Yes. Okay. Cool. So what I did for us today is I went ahead and I set us up a preventative maintenance job. We're going to be working on see they're walking cooler or chiller, I would have to double check, but we'll be working on our piece of equipment from our I hope location that was due in November to every quarter we could see.

BROOKE

31:33 And because this was my recurring service... when I created this work quarter, the neat thing that happens is everything I need to know, transfers over automatically. There's no need to recreate in. So my description at recommending me as the preferred technician, it's that it's gonna take about two hours.

<div align="center">BROOKE</div>

31:51 All that information flows over naturally including the parts labor in items, expect it to you. So my job, but of course, that can be altered. So as we go out to the field and just a second here, keep in mind that service trade cloud base. So when we're updating deficiencies, taking photos, meeting notes, everything we do is gonna transfer over to the office in real time. So bear with me while I switch my screen here and we'll cut out to the field.

<div align="center">BROOKE</div>

32:32 Okay. Can we see it says loading there we go. Can we see where it says? My hot job at one 30? Yes. So this is now the mobile view of service straight to the app that your technicians would log into as a reminder. We're friendly with iOS or android phone or tablet, completely your preference.

<div align="center">*--- Tech On-site ---*</div>

<div align="center">BROOKE</div>

32:52 But first thing they're going to see is their appointments for the day. They can also see completed work and unscheduled work. But focusing here on our work quarter, I'm gonna click into that. And here is my mobile work quarter. Now the purpose of this such as it should be resourceful intuitive easy for them to use. And it should really setting them up for success overall when working with this customer. So down at the bottom, we have those events. So I can indicate that I'm honest maybe driving to the job or maybe prepping for the job. So whatever sort of time you want to help you track the enroll is where you could send a notification to your customer letting them know that, hey, I am on the way here's. When you can expect me so that you're not, you know, surprise when I walked through the door here. So I just sent you an example of that Tracy. Now I'm clocked in. It's tracking my time and my first thought is going to be to go up here to services.

<div align="center">*--- Assets ---*</div>

<div align="center">BROOKE</div>

33:51 Take a look at what I'm here to do today. I can see that I'm here for my refrigeration system, PM, I've got a little task lists for me and then my next instinct is going to be to go down here to assets. And perhaps I would like to familiarize myself with what it's done before on this asset. So I click into here, I can make sure that make model serial number are all still accurate, of course. But more importantly than that, I can go to the service history. So with one click here is every single job performed on this refrigeration system. Okay. Yep. And so your technician can go into maybe the most recent job back on the 20 seventh and see who was there, see the pictures they took the notes they left.

<div align="center">*--- Forms ---*</div>

<div align="center">BROOKE</div>

34:36 And this really gives them a lot more context before beginning. They're working course. So... now one thing that we can do is we can take if you have, or do you have maybe equipment checklist? Anything that you're sending your technician out with?

TRACY

34:56 Yeah. And all of our well planned maintenance start up, everything has editable PDF that they have to fill out.

BROOKE

35:04 Yep. Okay. Yeah. So we'll kind of grace through that then since you're already familiar with the syllable PDF, but same idea you'll give us your available PDF. We can put them into the system for you and service trade smart enough to dispatch the correct PDF dependent on the job or asset type that your technicians working with. So they're only gonna see what's relevant to their current work. And then they'll open it up, fill it out and Adobe links directly to service trade. Sure. So let's say this, let's say that we're going through our inspection or preventative maintenance and we've identified a problem on the refrigeration system that we're working with.

--- Deficiencies ---

BROOKE

35:46 So maybe there is a Brooke can come across our, so we're gonna go up here to deficiencies, and we're going to go ahead, add a new deficiency. And first of all, tell the system what's wrong. And then it's gonna ask us to take a picture. So here is our compressor.

BROOKE

36:07 Let's say your technician forgets to open up service trade before they're taking pictures. No worries. I can upload it from their library... can leave notes, comments on these pictures too, if you want to get that down to the nitty gritty there. But here we're selecting the severity of the deficiency. So keep in mind the timeline aspect for your customers being able to say, you know, hey, we were here earlier this year, we made a suggestion to you. Didn't you know, he chose to put it off. Now insufficient symbol. So we have that and then tied back to the correct asset to Bill history, not truly in service trade and mark that as new proposed solution and go ahead and save. Now, Tracy, as soon as I save that someone like yourself in the office would have been notified with the report I just created that he was founded. I hop that's your queue to go in and look at that report, flip it into a quote, get it out to the customer as soon as possible.

BROOKE

37:09 Your thoughts on that reporting process from a technician standpoint?

TRACY

37:13 Yeah. I mean, so far it looks good and I saw you can add video as well?

BROOKE

37:18 Yes. Yep. Yeah. Videos and audio memos?

TRACY

37:21 Okay.

BROOKE

37:22 Yeah, that's helpful if that machines making a weird sound to either video tape recorded just so. Yeah.

TRACY

37:29 Yeah, just, we just like I said, we handle startup and warranty. And when we have warranty issues or the factory is now requiring both photo documentation and video documentation.

BROOKE

37:42 Chat. Okay, perfect. So before we head back to the office and we flip that deficiency, I get into a quote.

--- *Customer engagement* ---

BROOKE

37:49 Of course, one thing that I always like to encourage our customers take advantage of is the work acknowledgement feature here. This lets you review the work done thus far with your customer and it helps everyone stay on the same page especially when you know deficiencies, our founder, you know, repairs are needed.

--- *Deficiencies* ---

BROOKE

38:06 So what you would do is you would select your contacts. So Tracy, today, I came out for your PM here's. What I did here is the paperwork, I filled out the pictures, I took, everything went great for the most part. But we did identify one deficiency. The broken compressor here's, what we found.

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

BROOKE

38:23 You can expect to quote in your inbox by the end of the day to day for how much would it be to replace the repair? And then, you know, once Tracy gets his blessing, he can acknowledge mark the t's and c's that you would have in your system is contact information is gonna autofill, and then he'll provide his signature there. So I have a copy of that. So you can customer perspective.

--- *Assets* ---

BROOKE

38:49 Now, whatever it may be, some of the key benefits you would see from the technicians point of view here. If they were to be looking at this, what do you think they would like?

TRACY

38:59 Obviously. So for instance, right now to go back and look at the history on an asset on their current app is very cumbersome and you can't look at videos, can't look at pictures?

--- Assets ends ---

TRACY

39:13 It's just, yeah, it's really clunky compared to this. So that's really nice. Is having that history on the assets? Obviously, you know, here's where we're different, right? Most of our work is either four hours or eight hours or multi days or multi weeks or sometimes months. That was going to be one of my other questions is let's say we have a large vertical stack heat pump startup job where I've got 500 vertical stack key pumps and it's gonna take us five months to complete one work order. Okay? Because one work order is startup of these 500 units. How would a service trade handle a work order like that? Is our, can you keep work orders open for multiple days? Or is it something they have to be close to the end of every day? I mean, kind of what does that look like?

--- Recurring maintenance ---

BROOKE

40:10 Yeah, you can keep them open. So in the sort of example that you gave during that first initial service setup on the location page, remember, you can indicate that the due date for that job is five months from them. So every time you do that job, you know that, hey, the due date is let's just say April math in my head is April thirtieth. And so you can know that. But yes, you can have not only multiple work quarters on or like multiple visits tied to one work order. So you can track everything in one place. Yeah. So that what you just described, we can handle.

TRACY

40:47 Okay. Yeah. Because just like I said, they'll stick with the vertical stack, key pub job which like right now we've got to a really large ones.

--- Assets ---

TRACY

40:55 So we have over a 1,000 assets that were managing. And so we have to start those up and it's gonna take months and not only do we have the startup phase, we also during that, we're gonna find some warranty issues, rights. We also have to track the warranty issues under a separate work order so we can build those back to manufacture.

BROOKE

41:17 Yeah. And that's the other helpful thing is you can indicate what type of job it is. So whether it's a service call or a warranty job or a Installation, each of your work quarters is going to be labeled with the type of job that it is... good. Anything that I didn't touch on here that you were curious about?

TRACY

41:39 I know you can do the upload of all PDF. So that way they can do all their startup forums in here. I understand all that attachments, get all that... do to do what's the, okay? I think that's it from the field side. And then obviously, they check in, check out. Do you guys have GPS technology or no?

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

BROOKE

42:05 Yes. And no. So what do you, what's your definition of GPS?

TRACY

42:10 Like where the tech is ad? I understand they have GPS in their band. So I'm not worried about the vehicle part of it just, hey tied to their phone. So when they're on site, you know, I can be like the customer knows their onsite so on and so forth. Just, I was curious if that's in the app store.

BROOKE

42:32 Yeah. So what it does is when your technician clocks in onsite it takes a snapshot of their location where they clocked in. So say, like I hop in there actually 20 minutes ways to leading watch it... but it's there's no like the ability for you to see like, okay, he is onsite they're headed up the stairs walking around the corner. So it doesn't go that far. So that makes sense.

CHUCK

42:58 Yes.

BROOKE

42:58 Okay. So I'll go ahead and clock out here and that, it's gonna ask me what I've completed for today. I have the option to not mark off anything has completed, but I'm going to go ahead and do that. And then it says, my done with this visit. So this kind of shows me, do I leave this work order opener? Do I closed out? So I'm gonna go ahead and say no, since I'm foreseeing a repair in my future. And now I'm clocked out for that visit specifically. So now I'm gonna stop and go back to the office.

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

CHUCK

43:31 Tracy. Well, she's doing it what the GPS system you have on the vehicles now?

TRACY

43:39 Would ask me that right up top of my head. Hold on one sec. I'm I have a brain fart links.

CHUCK

43:47 Links up. Okay. Yeah.

TRACY

43:49 Hello? Hi, annex you pee.

CHUCK

43:52 Okay. Yeah, just.

TRACY

43:54 Into the, you know, the standard report that like the car dealership plugs into.

--- Customer engagement ---

CHUCK

44:01 BTC port.

TRACY

44:02 Yeah, yeah, just plugs into they're pretty simple device. I get, you know, heartbreak fast starts, you know, speed alerts. If there is a correlation, I'll get reports on that. Yeah, it's pretty nice. Got an online portal that I go to that I can get all this reporting from.

--- Customer engagement ends ---

CHUCK

44:23 Gotcha.

BROOKE

44:27 Jeez.

--- Tech On-site ---

BROOKE

44:40 Alrighty. So now we're back on the office and we can see the Progress that we've made so far. So we can see that the technician has completed that job, but of course, we're showing Progress from the ops perspective, making sure everything is an order down below. We can see the clock events, so the time and the location in which they clocked in at this references, but the distance away from the job that they clocked in.

--- Deficiencies ---

BROOKE

45:04 So you could see if they're like 10, 20 Miles away. Now we can see our deficiency. So that broken compressor, we'll click that and just a second. And then here is... that work acknowledgement that I, getting the signature on and transferred over neatly. So focusing on our broken compressor here is the report that you would be sent to your email.

--- Deficiencies ends ---

BROOKE

45:26 So it's going to show you who found the issue, how urgent it is, the pictures they took and you'll know exactly how to code this out.

TRACY

45:35 Then who does that get sent?

CHUCK

45:38 Who?

BROOKE

45:38 You tell the system you want it to get?

TRACY

45:41 Perfect.

BROOKE

45:41 Perfect. So when you're setting up your account, you'll set up, we call them just like user roles and say, yep, okay.

--- Deficiencies ---

BROOKE

45:48 So we can see it's marked as an operable broken compressor. She thinks we should fix it looks like the top and 20 for other time. So definitely something to make our customer aware of that. This is a recurring issue. And then down here here are three photos of our compressor.

--- Quote templates ---

BROOKE

46:04 So now you would know exactly how to work this out. So we'll take this added to our quote, make sure our pricing contract is accurate. You can set an expiration date if you want that.

BROOKE

46:19 And when you're setting up your service trade account, you're gonna take those templates that you've made and you're gonna put them in our system. So that same idea the purpose is to save. So if you have a boat that you're sending out on a regular basis and you'll have templates in service trade and you can go ahead and apply that whenever it's necessary. So we use one of my compressor runs. This is going to be your verbiage parts, labor in items, but just for pretend today... and we can edit whatever we need to. One really neat thing is self-service trade, keep track of your margin and... there's enough, you know, intuitiveness to the system to where if you make a pricing change, it's gonna adjust the margin by default.

TRACY

47:05 So, let me ask you a question.

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

TRACY

47:06 So we don't carry any inventory. So all of our, when we are quoting repairs, the service technician reaches out to our parts department, gives them a parts list. They then get it. We then get a quote back from part. So we would be entering that more than likely as a single line item entry that just says parks, we don't our customers get a lump sum price, right?

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

TRACY

47:36 They don't get a breakout. So how would I go about getting that in the quotes that we get back from parts or a PDF? How do I go about getting that PDF included in that folder per SE or, you know, that job quote? So you could go back and look at it later, so on and so forth?

--- *Quote templates* ---

BROOKE

47:56 Yeah. So one thing that I'll highlight is that this views your review from the admin perspective, you can tell that you can from the detail over for the customer, you can say grand total only, they don't get to see any of this but you, if you need to, you could break down each part that they approved before or you could just create a line item that says parts and we got it.

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

BROOKE

48:17 You know, that's just all the parts, blah blah blah. So that we can handle. And then in terms of attaching maybe the PDF from your parks department, I would say the attachments tab.

TRACY

48:30 Yeah. Okay.

BROOKE

48:32 So let me change that to grand total since you said that's what you typically do... see. And then we'll go ahead. I'm gonna send this to you if you don't mind interactive email.

--- Quoting ---

BROOKE

48:52 And I'll open it up here as well. I know I sent you a few. So make sure you click on the says quote for a pair.

TRACY

49:03 Laundromat prepare quote. Okay?

BROOKE

49:10 Yeah. Yeah. Got it. And now here's what your customer might see from a quote from service trade perspective.

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

BROOKE

49:19 Now, of course, you have your name and logo up at the top here, right? Also have the description of the work services to be completed, painting the picture for that with the media attachments directly on the PDF, so they can see the severity of what's wrong. And then your t's and c's at the bottom that grand total that you want to present to them and ease of use for your customers with either approve or request changes. And we've you request changes a lot better than her check button in this case.

TRACY

49:53 Okay.

BROOKE

49:55 How do you think your customers would feel about a quote sent in this format?

TRACY

50:01 Because they, I see they have the capability up there to printed or PDF it, which is great.

BROOKE

50:06 Yep.

TRACY

50:07 As long as they have the capability to do that, I think they would respond well to it.

--- Quoting ---

BROOKE

50:12 Cool. Would you mind going in and approving it for me? Sure. And you'll see that as you're doing that, it's asking them for a purchase order if it's ever necessary, they ask them to check off that they've read it and I'll and then as soon as that's done, you'll get a notification again that the quotes approved. And so here's our date timestamp. So now that our work is good to go a few cool things to highlight background service trade. So the first thing is that we're keeping track of the history of all of your quotes. So if someone opens a quote census person, whatever the case may be, you're gonna know that by looking at the history. So I can see here that you viewed it at this time, that's helpful to you. If you've got past the customers that take their time getting back to you, at least know what they saw and you can run reports on that. So you can go to the quote quoting reports and say service trade, show me all of.

TRACY

51:11 Hello?

BROOKE

51:12 Customer never responded to and let's both resend those all out to get it to the top of their inbox. So lots of engagement there. But now that are quote is approved, we can go ahead and either create a job from that approves quote or if you want to add this tool already open job or work order, we can do just that.

--- Quote templates ---

BROOKE

51:33 So we'll go ahead and do that today. We're gonna add it to our existing job... and we'll go ahead and copy the quote attachments. And another thing we can do is now we can create a budget for the job.

BROOKE

51:51 I guess that's a little bit more on the project management side, but.

--- Deficiencies ---

CHUCK

51:54 Well...

TRACY

51:54 We, we even.

CHUCK

51:55 Do that?

TRACY

51:56 Generate a budget as far as our proposal process. It's all in one in the same.

BROOKE

52:01 Well... but you can track that as you go. So now here is that broken compressor repair tied to that initial work quarter that we were working on earlier, so that there is one example of how we can have multiple services on a job.

--- Tech On-site ---

BROOKE

52:17 So... but for time's sake, I'm gonna go ahead and say that we went back out to the field. Of course, we completed our repair. Everything's good to go technician has mark, their job is complete. And now we complete this job from the office. So we'll go ahead and create an invoice.

--- Tech On-site ends ---

BROOKE

52:39 And review everything here won't be too picky.

--- Customer engagement ---

BROOKE

52:53 And now invoices created here, but I did want to ask before I go to quickly thinking about the process of identifying, you know, issues in the field, getting those issues relate back to the office in real time, getting close that out faster. Do you see how just through that process service trade can help you achieve your goal of growing your revenue?

--- Customer engagement ends ---

TRACY

53:17 Yes, definitely lot faster than what we have today.

BROOKE

53:22 Perfect. Cool. Well, here is our invoice. So, first thing you'll notice is that we're tracking the margins of course, and we don't want to be making negative 32 percent on our job so you can make your corrections there.

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

BROOKE

53:36 Let's see what I did wrong. There we go. And for invoicing, or are you also doing brand total typically or is that more broken out?

TRACY

53:49 No, that's grand total sometimes when we may have a customer who request to blame her material breakout.

BROOKE

53:58 Yeah.

TRACY

53:59 VS, yeah.

BROOKE

54:00 And that's of course, that's just like a quick settings change that's easy. But here's what an invoice would look like to them.

BROOKE

54:16 So, your name and logo, of course, your t's and c's brand total. They can have a pay now button. They can pay your credit card or a CH directly through service trade. And then they go to service details button, which takes them to that full scope of work out why that was done on their job site.

--- Deficiencies ---

BROOKE

54:32 So in this case, we could see we've done a PM today came back and fix that broken compressor. Here are the parts labor at items we used if we want to include that, of course, permissions based comments left by the tag here's our form. We filled out the pictures we took, and then here's that fixed broken compressor.

--- Deficiencies ends ---

BROOKE

54:50 So, I'm kinda looking at this through the customers lens. Do you see how this might help them better understand where the resources are going?

TRACY

54:59 Apps, absolutely.

BROOKE

55:01 Are you sending them anything like this right now for your current system?

TRACY

55:05 What they did ask when we invoice the job?

CHUCK

55:08 The copy of the invoice?

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

TRACY

55:10 Goes with it. And so it's just sent to them via email.

BROOKE

55:15 Okay. So there's a copy of the invoice, but are the job details on that invoice to like?

CHUCK

55:20 Yes, yes.

BROOKE

55:22 Gotcha. Cool. Well, you know, that was more or less my plan on what to cover today. There's a lot more I could show you, but I want to be respectful of your time based on what we've walked through so far. You know, what are your thoughts? This being a refresher on service trade being?

--- ST app contracts and pricing ---

CHUCK

55:40 Better for you. Yeah, think everything's pretty much like I.

TRACY

55:44 Remember it was... do you guys, does service trade have the ability? So we talked about, you know, one job with multiple work.

BROOKE

55:54 Course.

TRACY

55:55 Within that job, how about the, for Progress billing? Hi, guys. I'm just going to be a video on that.

BROOKE

56:06 I can briefly touch on that. So we don't do traditional like AI billing. We don't claim to, but what you can do is let's so like this is the invoice, for example, if the

totals 950 to let's say you got or they'll say you have a payment plan with their customer and they send you a check for 200 dollars as, you know, a part of the billing, you can add that in and you could see what still do.

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

TRACY

56:31 Gotcha.

BROOKE

56:34 See. So let me say that they sent us 200, save that. And here, we can see that 200 spend paid... that's kind. Have I'm, not sure if Chuck might know more if we were strictly in our strengthening our handle that with the new project management features. But that's what I know right now that we can do, would that be?

--- ST app contracts and pricing ---

CHUCK

56:56 Yeah. So the video will send you, I show a project with multiple phases on it scheduled over multiple days and weeks with different texts. And then as I complete a phase, I invoice that phase. So then you could send multiple invoices out maybe as each phase gets done or maybe each month or we wanted to do that. Okay?

--- Accounting integrations ---

BROOKE

57:23 Awesome. So... it sounds like everything's looking good. What are maybe some of the main benefits that you saw today?

TRACY

57:35 Well, compared to what we have, it's I mean, all of it... I mean, just like I said, bars is a sequel server non cloud based, you know, 25 year old technology, probably older than that technology. Yeah, it's just clunky cumbersome is there a file size limit on files that can be uploaded?

--- Assets ---

BROOKE

58:02 Not that not that anyone has hit. So I'm gonna say no.

TRACY

58:09 Because we do being that we're doing startup and warranty work, we do have fairly large.

CHUCK

58:17 File. So for instance, you...

TRACY

58:18 So on an asset, I'll call it a chiller, right? We need to upload. So it lives with that asset.

--- Assets ends ---

TRACY

58:25 The Iowa manual, some of those manuals can be, you know, huge. It can be like, you know... 10 max. So.

BROOKE

58:39 Yeah. I don't think that's going to be a problem at all. Service trade works with companies from three technicians and I think our biggest customer barbaric, I think they're in the five or 600 for technician. And so if they haven't hit the data limit... yeah. So I think that would be okay. But from here... what do you kind of see as the next steps now that we've gone through the demonstration?

TRACY

59:08 Probably what I will do is go back and review my documentation with you guys from before because this just all happened obviously yesterday to today... some really just getting back into the service trade part of it. So I'm going to go back through all my documentation notes and my questions and that I had back then and maybe you guys couldn't answer back then that maybe you can now. So let me go back and go through all that. So I'll probably be in touch with you guys, reach out to you next week with any follow up questions and then schedule the next what I'll call demo which would include.

CHUCK

59:58 The accounting side of the.

TRACY

59:59 World. And maybe one or two people from my team like a salesperson, and then one of the coordinators and probably my operations manager and see if they have any questions.

--- Accounting integrations ---

BROOKE

1:00:14 Okay. Sorry, next step would send her around more of the accounting portion and then questions, of course, from.

TRACY

1:00:20 Yeah, yeah. Yeah. Yup.

BROOKE

1:00:22 So, I guess to clarify, I know that you were mentioning that there is a chance you might switch to Quickbooks. Do you know when that decision will be made? Whether you're staying with Computerease or switching to Quickbooks just so we know who to.

--- *Purchase decision* ---

CHUCK

1:00:36 That, that'll...

TRACY

1:00:37 All of that is, it's all one decision, right? So when I make the decision on software company, that's when I'll make the decision on how we're gonna handle accounting. It's one one decision basically for me.

BROOKE

1:00:52 Okay. Gotcha. Well, we'll certainly invite our Computerease expert, but I'm sure she can speak to Quickbooks as well. But seeing as you are currently on Computerease will focus more on that until you give us any sort of indication that you would switch if that sounds fair to you. Yeah. Okay. And then when are you planning to look at BuildOps and then I forget the other one too.

CHUCK

1:01:16 Yes. So we did our BuildOps demo, the.

TRACY

1:01:19 For last, so we did there, you know, because we went through this with both you guys couple of years ago. So we did our refresher with BuildOps the week for lashed. Did you guys today? And then I have a schedule a demo with Salesforce next week.

--- *Accounting integrations* ---

BROOKE

1:01:41 Okay. So Salesforce is next week? I'd be curious to know how you would compare us to build apps?

TRACY

1:01:50 You guys have a lot of similar things. Just the interface is a little bit different, but of course, there are different programs, right? But, yeah.

CHUCK

1:02:00 Yeah, you're both.

TRACY

1:02:02 Hello, good.

--- Purchase decision ---

TRACY

1:02:02 I mean, last time I haven't narrowed down to you too, and that's when we were getting into the nitty gritty of the accounting and, you know, we're going to stay with CE or where we're going to go a different route. I even had you meet with our it company and your vice president of... I think I can't remember his name. I'd have to look at my emails but.

CHUCK

1:02:29 And we went down the rabbit.

TRACY

1:02:31 And had our it company who actually made see he?

CHUCK

1:02:36 Which has...

TRACY

1:02:36 Now been sold... anyways, we were down the rabbit hole. Let's put it that way. So.

BROOKE

1:02:45 Gotcha. Cool. Well, Chuck and I are going to make a workspace for all of us to collaborate within it's a 12 recap. So, when you get a notification that Brooke guiding you to recap stops, just think of it as like a... I don't know the word, think of it as one nice place where we can talk about resources, ROI questions next steps rather than emailing back and forth a bunch of emails to that, Tracy?

--- Purchase decision ends ---

BROOKE

1:03:13 And then he mentioned, let's check in next week. You said, yeah. Okay. So, does it make sense for me to give you a call? Let's say either next Thursday or Friday that's the first or the second.

TRACY

1:03:26 Yeah, that would be perfect.

BROOKE

1:03:28 Okay. I have some time on Thursday. Does, what time did we start today? One 30, my time. So, are you central or eastern?

TRACY

1:03:37 Or central?

BROOKE

1:03:39 I were to give you a call at same time we started today? That would be 12 30 central for you on Thursday, December first just to check in and maybe schedule our next meeting. Do you think you'd sure?

TRACY

1:03:50 Be great?

BROOKE

1:03:51 Okay. And I'll send you a calendar invite to just so you have it on your radar because I know that you probably get really busy.

TRACY

1:03:58 That would be.

BROOKE

1:03:59 Accurate. Awesome. Well, any other questions for today before we hop off?

TRACY

1:04:05 No, I think that's it.

BROOKE

1:04:07 Okay, awesome. Well, thanks for your time today. It was really nice chatting with you, get to know your business, and then I'll look forward to speaking to you next week bye.

TRACY

1:04:16 Thanks, Brooke. Thanks, Chuck, and you guys have a happy thanksgiving tomorrow.

CHUCK

1:04:20 Saying, thanks Tracy, you as well. Bye bye.

The End