



ServiceTrade Demo with Cli-Metrics

Dan Waggoner with Cli-Metrics
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Participants

SERVICETRADE

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SDR

OTHER

KColin

Kevin Colin

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Transcript

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DAN

0:00 Right. I see a ghost.

KCOLIN

0:02 Yeah, really? How are you?

DAN

0:04 I'm doing great. How are you this morning? Okay. Excellent. Well, looks like you can hear me loud and clear. Everything's working good. Yep, good to go. All right. Excellent. Well, my name's Dan. I am the inside territory manager, for California, the southwest. So I handle California, Arizona and Nevada, but a lot of my customers are in California. I've been with ServiceTrade for about three years. So I like to think I've got a good idea of, you know, the pulse of the market, but definitely like to start these meetings off here from you and to get an idea or to give you an idea of how I like to do these meetings, right?

--- Purchase decision ---

DAN

0:44 We're here for a demo. So we'll walkthrough some of the product. Like I said, I do want to lead with understanding a little bit more about your needs and what you'd like the solution to provide for you at the end of the day, where you wanna be once this is implemented, right? And hey, if you see value throughout the demo, this looks like the right product for you, it's gonna add some value to your business and we can talk about next steps. But does that sound like a good idea, for our first meeting here?

KCOLIN

1:08 It does.

DAN

1:10 Excellent. Well, I haven't yet. So I got some pretty good notes here honestly from Henry who set this meeting up? Sounds, I figured I would just sorta brush through those a little bit and then we could sort of start our conversation from there.

KCOLIN

1:25 By the way.

DAN

1:27 Excellent. But I mean, it really boils down to what you guys seem to be looking for software is a little bit updated.

--- *Type of work* ---

DAN

1:34 They don't seem to be putting in the work to improve it for your market. Being a commercial contractor, looks like you guys focus on maintenance contracts, very detailed and complex with those maintenance contracts in that can handle that for you and scheduling, dispatching, multiple technicians, multiple appointments. I'm guessing equipment information would be important for you. So customer asset... and just getting better overall visibility on operations, what you have going on at any given moment and what you have upcoming. So that's sort of, the gist of what I have from Henry and you guys are 100 percent commercial with 10 texts in the field right now. Am I on the right track so far?

--- *Purchase decision* ---

KCOLIN

2:20 Yeah, zero.

DAN

2:22 Okay. It sounds like you've looked at several platforms. So I'm guessing you, you've got a pretty good idea of, your win criteria if you will for the solution? Is there, do you want us to sorta take it from there? Anything you want to expand on what you'd like to gain from our meeting today?

--- *Accounting integrations* ---

KCOLIN

2:40 Well, the, you know, there's a whole bunch of things I'd like to understand in terms of the different modules that you have, if you will. Okay. Web portal, what kind of accounting program? How does that work? Do you have a quotes module understanding how the maintenance tasking works?

--- *Assets* ---

KCOLIN

2:59 Because we are totally asset based maintenance, everything that we do is tagged with a specific asset number, and then we're able to track financial and work history to that asset... that's that is what we do. We're a service company that does project work. We do not work with general contractors.

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

KCOLIN

3:24 So, but we do need job cost. Okay? It's not complex that what we do but on jobs where we have 500 hours, 600 hours, we do want to, you know, see how from a cost code perspective we're performing.

DAN

3:40 Absolutely.

KCOLIN

3:42 So, so, the first question, is service trade, the service trade have an accounting, general ledger program or do you have to bolt onto something else?

--- Accounting integrations ---

DAN

3:59 So service trade is not an accounting platform, however we are going to handle a lot of, you know, items cost code. We're going to do some job costing in service trade. So you can see that as well. But all of our customers have a separate accounting system. I think last time I checked is 113 different accounting systems across our 1,300 plus accounts that are actively using service trade. So... are you guys currently, you currently have an accounting system? It is see, I was in the notes, I know.

KCOLIN

4:36 Yeah, yeah. So traverse, but everything comes although traverse is a software accounting platform that is designed by open systems. It is, it all comes to us through a relationship with the company that provides us with a sent.

--- Accounting integrations ends ---

KCOLIN

4:53 So, the there's pretty tight integration between the two. So that software in essence is delivered to us by a sent. So the difference in the model is we would land up dealing with servers trade and somebody else from a support perspective. So.

DAN

5:15 I was following you until that last bit. They're dealing with someone else from a support perspective.

KCOLIN

5:21 Yeah. So if we went with, so give me, do you guys link up to Quickbooks? We do. Okay. So that means from a support perspective, right? We have to have an agreement with intuit for, their program and their support. And then from an operational standpoint, we gotta deal with ServiceTrade and, a different operational support team.

--- Accounting integrations ---

DAN

5:46 That's right? Yeah. So.

KCOLIN

5:47 Then the, so then the question becomes is how well tightly integrated is service trade to whatever accounting platform there is?

DAN

5:55 Absolutely. Yeah. And when it comes to integrations, right? We like to sort of take lead on that, right? If we're setting you up with an integration... chances are you can call our support team, right?

--- Accounting integrations ends ---

DAN

6:08 If something, if something has gone awry so, so we'll sorta take the lead on that where you want to support you with the integrations that's sort of. So if that's part of our agreement, if that makes.

KCOLIN

6:20 Okay. Got it.

--- Accounting integrations ---

DAN

6:22 Yep. And so just so I'm clear here. So reverse and so sent is the accounting platform essentially.

KCOLIN

6:33 It is the ascent is the service trade equivalent.

DAN

6:37 Okay. Got it. Okay.

KCOLIN

6:39 Traverse is the GL program. It's just that ascent provides us with traverse as part of their solution.

DAN

6:48 Gotcha. So, it's a bolt on sort of service module to help with the more operational type.

KCOLIN

6:54 Priorities, ascent is service trade. Okay, that's what they do. They just have partnered with traverse for the GL. However all our support comes from ascent for traverse.

DAN

7:12 Gotcha. Okay. Cool. And, and we can definitely, if service trade looks like it's going to provide what you need. Then, the next conversation can be, right? Can it provide what you need as far as talking to your other systems, right? I will say some people out of our customers, I think it's about 60 percent 50 percent that choose to integrate with their accounting system, others run service trade as a standalone platform. And because you're able to report and get the financial information out of service trade that you need, to your accounting platform rather easily.

--- *Invoicing* ---

DAN

7:45 And you can also invoice and get paid through service trade. So at the end of the day, you can get paid without even thinking about your accounting system. But then obviously, for things like accounts payable and such, you will need your accounting system at the end of the day.

--- *Accounting integrations* ---

KCOLIN

8:02 Well, even more important than that or insurance companies, banks. Yeah, at yada.

DAN

8:06 Exactly. There's a lot that goes into it that service straight doesn't handle on the accounting side. So definitely wanna make sure that's clear, you definitely will still need the accounting platform, but we can do quite a lot here in service straight.

--- *Type of work* ---

KCOLIN

8:18 Okay.

DAN

8:20 All right. So, I was curious about your maintenance contracts. How are you guys handling those now? As far as selling them?

KCOLIN

8:29 What does that question mean? I don't know what that needs.

DAN

8:32 Yeah. I mean, do you have sales people in the field is new? Is new customer acquisition a big focus?

--- Type of work ends ---

DAN

8:37 Or I mean, when a contract runs out with a customer, how do you provide them a new, you know, detailed proposal for, hey, this is an agreement for the next three years or is that something you all are doing?

KCOLIN

8:52 Yeah. I guess I'm trying to understand, you wanna know what our sales process is, and I'm trying to connect the relevance. Well, you mentioned.

--- Assets ---

DAN

9:02 Some modules, we do have a maintenance sales tool with service trade and it is very specific with tasking, it's built out with a library of over 30,000 components where it'll give recommendations, you know, based on the equipment, you scan the label, right? It'll say, hey, this is the manufacturers recommendations, the warranty, the, all the specifics that you need, pull that information in.

--- Assets ends ---

DAN

9:27 So, like you mentioned with, your asset tracking, I thought that would be attractive to you. The way that it provides sort of exactly what you were talking about. So I was just curious.

KCOLIN

9:38 Okay. Maybe the easiest way, to articulate how we're currently delivering maintenance is to do a screen share. Okay. Can I, is that in... that?

DAN

9:58 You should be able to, if it says you need permission, let me know, and I'll try to figure out how to give it to you.

KCOLIN

10:04 Okay. Let's see.

--- Tech On-site ---

KCOLIN

10:14 Okay. Can you see the screen?

DAN

10:16 I sure can.

KCOLIN

10:18 Okay. So... here is an example of a client site. Okay. So right here, where it says customer address, that all that information is coming from traverse, this is one particular job site. If I went to a different job site?

--- Recurring maintenance ---

KCOLIN

10:48 So, for river rock, there are three different job sites. So we'll pick 395. Okay. And if I click over to the other one for the same Bill two or customer address, you'll see it's the same yep. Okay. A little different. What we do is, right? So, we have a customer site or Bill to whatever you wanna call it.

--- Assets ---

KCOLIN

11:10 And then attached to that are the various job sites that we perform services at. This is, the entry screen that gives us the basics of information regarding the site. This will tell us more information about the site zone, technician, hourly rates. That sort of thing... I'm gonna jump to components is where we keep all the assets. So here's an example of for this one site of all of the, all the assets that we have physically tagged that we have tasking associated with.

DAN

11:51 Fantastic.

KCOLIN

11:56 So I can select, I'm sorry.

DAN

11:59 I was just curious. I mean, this is great. The way that you're tracking assets, excited to show you what service trades got to do on that end. I think you'll appreciate it, but I'm curious here. As far as all these assets, this is that specific to the one job site. Okay?

KCOLIN

12:15 That's it. So let's jump into this for a minute. So let's take a look at this specific component or asset. One of the problems that we have with a sent is the program you know, started in the dos world, and they've moved it up over the years. And some of the screens don't make sense like you've got local identifier components. We're all talking about the same thing, an asset number?

DAN

12:42 Yep.

KCOLIN

12:43 So we have a profile for the unit. And then at this unit, right? We assign it to a, an equipment type which has that equipment type, has the template of tasks for that specific unit. Yup. Okay. And then we assign it to a.

DAN

13:04 Correct. Beautiful.

KCOLIN

13:07 Okay. So then we go in and we click on tasking... and what it'll do is it'll pull up the template of all the tasks, and then we go in and we assign a specific type of labor code, got it for that task... and we do that for the entire year.

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

DAN

13:34 Okay. That's great.

KCOLIN

13:37 And then there's a parts list. And then what we do is we sign the parts then for, you know, by month. So, one of the challenges we have is that when you assign parts to a component, you have to assign it to make sure that it's in the same month that a task shows up to use that part or that tool.

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

KCOLIN

14:01 And there's no way to do that unless you do print reports and do a manual check to say, do my, does everything line up? Does that make sense?

DAN

14:12 It does. Yep. Okay. So when, the service is supposed to be delivered, you have to make sure you're assigning the part to that service window or, that timeframe?

--- *Assets* ---

KCOLIN

14:21 That to that unit for that month to make sure that part or tool is there so that they can say I performed a lead check, like it says right here, tool refrigerant, lead detector, so that they were able to say I performed the lead check. Because when the tools and equipment and parts were staged for that maintenance, a lead, a special leak detector goes out with that. Yep. Otherwise, they can't complete the task.

DAN

14:52 So, the make sure the technicians prepared, they show up with what they need, that's correct? Okay. Yup.

KCOLIN

15:00 So, then if we flip over to the maintenance, what you'll see is all of these contracts... and you'll see some that are just talking about billing. So, we'll just, that is a contract and it's set up just for billing. So every month we're billing 21 81. Okay. There is no, there is no... service tasking assigned to that contract. It's just billing because we Bill at the beginning of the month.

DAN

15:34 And are you doing recurring billing at the beginning of each month? To just both send out invoices? Okay?

KCOLIN

15:40 Yep. And then if you look at tasking, what will happen, is there will be no billing associated with the tasking. It's just the service. And what this does is it goes out and it looks at all of the tasking at that site by month and rolls it up to a summary page. It does not tell us what tasking is being performed. Would you like it to? Yeah sure. I mean, that's one of the, that's one of the problems here. We know that in December, Josh is gonna go out to the site and he's got things to do. The only way to know what he's gonna do in October is to go in and look at all the detailed tasking for that month. Now we have, so our maintenance, our process is on the fifteenth of October. We will go in and create all the maintenance jobs for the month of November... that will generate a list of here are all the tools and the parks and everything else you need for that job site, for that job number for that technician.

--- Recurring maintenance ends ---

KCOLIN

16:53 And it kinda gets a little bit confusing because like in the month of December, you'll see we have two technicians assigned. They both get assigned two different job numbers.

DAN

17:04 Okay. That sounds a little.

KCOLIN

17:07 It's messy. Yeah.

DAN

17:09 Okay.

KCOLIN

17:10 We actually had to have them go in and do some customization so that... they both got the same job number, but with an appended number, dash one, dash two.

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

KCOLIN

17:22 So we could at least see, okay, we've got two job maintenance jobs out there for two different texts. And now, if you wanna know what it is that they're doing or what parts that they need.

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

KCOLIN

17:32 You gotta go through all this research. You can see, you can see... how character based this program is. You know, this because it comes from the...

DAN

17:47 World. Yeah. That being said, I'm very impressed with the way that you manage your customers equipment. And I mean, not everyone is able to. I mean, not everyone tracks equipment that well, and it's very important to what we're gonna talk about today.

KCOLIN

18:06 Cultural thing. Dan, you have to instill it and we're a union company and it's very difficult for sometimes union members to try to wrap their head around this. But what we do is we issue one job number. So on a service call, if we go take a service call, which we have very few of, we issue one job number for one asset. So if they land up going out and working on multiple assets, we land up issuing multiple job numbers so that we can parse the database that way because, we will then run reports and sit down with a client on an annual review and go to this list... and show them what they've spent year by year and then show them how old it is when it needs to be replaced and what the current value of that replacement is. So that from a budgeting standpoint, they can plan absolutely.

DAN

19:12 Yeah, that's correct?

KCOLIN

19:14 And then a lot of this stuff is pumped to the web portal for them.

KCOLIN

19:21 So that's how we manage our clients... maintenance and it's not, you know, this is not for the faint of heart. This is a lot of work to get all of this set up. Yeah, it sounds like...

DAN

19:39 You've been using this system for a long time or? Yeah.

KCOLIN

19:43 Yeah. This is my second company. I used it in the first company because I knew the, one of the founders of the company who was also the coder. Well, he's now retired. And so when I started this company, I went back to them because I knew what they could do and you know, then, the founders of the company sold it and they went publicly, you know, to a PE firm and, you know, the rest of the story.

--- *Accounting integrations* ---

DAN

20:08 Yeah.

KCOLIN

20:09 So... you know, in my opinion, it's a dying application because it's owned by a company called Jonas. I'm sure you've heard of Jonas?

DAN

20:23 I have, yeah.

KCOLIN

20:24 Yeah, that's who owns a sent and Jonas is owned by a software holding company called constellation. So, I personally don't think a sent will be around for five years and what will happen, is, and Jonas will just send out an e-mail saying, okay, you know, as of such and such a date a sent gone, you need to roll over into Jonas... and they'll they recognize that they'll lose 60, you know, they'll lose 40 percent of the customers and they'll keep 60 and raise the rates.

--- *Accounting integrations ends* ---

DAN

21:02 Yeah. Okay. Well, that very useful. That was very helpful. I appreciate it. Kevin gives me a great idea of where you're at, and the needs that you'll have here.

--- *Purchase decision* ---

DAN

21:18 Curious did you have with, your previous, you know, evaluations? I think you mentioned to Henry. The only one left standing was BuildOps. I was just curious, you know, if they missed the mark anywhere or if there's you know, some things that you really loved about them that you wanna make sure you have here or I guess where the others were missing the mark, why folks were falling away.

--- Type of work ---

KCOLIN

21:41 Well, like service tighten, I think it's a great program. You gotta be a residential contractor. So the, after going through with my calling process, BuildOps is really encouraging to me. Primarily one of the things that I really like and they do the same thing. They have a bolt on GL, as, you know, package, they handle maintenance tasking in a way that... is an enhancement over what we currently have.

--- Type of work ends ---

KCOLIN

22:14 Okay? And one of the things that they can do, is, if I have a task that says, you know, record the supplier temperature... that temperature can be recorded and I can then take that out for that asset over a date range and trend it... absolutely, that's important.

--- Purchase decision ---

KCOLIN

22:40 So, you know, I'll tell you what I told them. If you want somebody who jumps into the not the weeds into the roots of the weeds that's me.

DAN

22:51 Got it. Well. And, we can definitely jump into some roots and some weeds. I enjoy doing it as well. One last thing I wanted to ask you before we jump into the platform here and we can continue our conversation as we go through it, I think would be the most productive way.

--- Type of work ---

DAN

23:08 But as far as handling... so technician goes out on a maintenance call, right? And you mentioned you don't have, you rarely have service calls. So I'm guessing that means most of, your service is, you know, proactive maintenance calls and repairs from those pull through revenue, right? That you're expecting and then, you know, is upcoming which is a great way to run your business, couldn't agree more with it.

--- Deficiencies ---

DAN

23:32 And so I'm curious, when you find, the repair opportunity or deficiency of an asset in the field. How does the technician report that and then get it out to the customer?

KCOLIN

23:43 Okay. So it's kind of a sucky process. So outside of, because we have the, what a sent chose to do is develop a mobile app using a web browser.

--- *Paper process* ---

KCOLIN

23:56 Okay? I argued with them at the time but it was the cheapest way they could pump mobile app. And so what happens is we have a it's called the blue slip internally because it's actually once upon a time when everybody was pay paper on paper, it was a blue piece of paper and it was the extra work recommendations form so that's all been digitized.

--- *Assets* ---

KCOLIN

24:22 So if the technicians out on a site, he has to jump out of and for each asset enter in asset number, model, number, job site, you know, parts needed, and all that sort of stuff that is then emailed into us... printed. And then it goes through the internal estimating process.

--- *Quoting* ---

KCOLIN

24:48 And then a quote is generated and sent out by the office. Okay? So what happens is what's happened? Excuse me, we have a quote in a sent which is great, but the blue slip is not with it. So the originating document to that quote is sitting in a file because we have to print everything and then file it.

--- *Deficiencies* ---

DAN

25:10 Yeah. And so as detailed as you're able to track assets right now, you're not necessarily able to look at an asset and say, hey, I wanna see every time we reported a repair opportunity with this piece of equipment, what the pair opportunity was, the status of that repair opportunity, whether it's been quoted, whether it's been repaired, who did it, right? Okay.

--- *Assets* ---

KCOLIN

25:35 Yeah, we have that, the thing, is we have to pound it into a sent.

DAN

25:40 Gotcha. Okay.

KCOLIN

25:42 And all that information is pumped to the technician through the web browser app. So when he goes out to a job site, he gets a dispatch and he has access to the history, the actual service history that's been performed. He also has access to outstanding quotes.

--- Assets ends ---

DAN

26:00 Okay. Gotcha.

KCOLIN

26:03 So, there are a lot of elements that asset has done, right? But at this point, it's just aging technology which prevents us to reduce the number of clicks we need to deliver that service.

DAN

26:19 Absolutely. Yeah. I'm actually, quite frankly, I'm impressed with the structure overall of a set.

--- Purchase decision ---

DAN

26:24 It looks a little bit like you're at one of, the DMV though as far as, the usability right? I don't know if that's good now, but definitely a little bit old school, right? And I'm sure you're probably a whiz with it, but I'm sure some of your, you know, if you ever hire anybody might be a little bit tough to bring them along and what you're doing and limited capabilities at some points, as far as getting some of the reporting you need, you know, it sounds like some of that has to be entered in step by step.

--- Purchase decision ends ---

KCOLIN

26:58 Yeah. When you have employee turnover the, whether it's in the field or in the office, the amount of time that you need to spend training somebody is intense... because it's not intuitive. Nothing about a sent is intuitive.

DAN

27:17 Got it. Yeah. And I mean turnover is kind of the name of the game right now. As far as technicians go. I mean, some companies are able to retain them, our customers, our top customers have figured out some way to really do that. But I mean, as, you know, the labor shortage facing a lot of folks. I mean, the commercial service industry as a whole, we skilled labor is there's a shortage of it has that affected your plans or, your operations much?

--- Type of work ---

KCOLIN

27:47 No. Because the, because if you look at... some of the other models like, I know that there's a new large blackstone company in San Jose going on your program on your platform. You know, a lot of these companies, whether it's thermo, whether it's at go, whether it's more, what their model, is that they go in with a low level of maintenance, and then they're looking at their pull-through ratios.

--- Pricing ---

KCOLIN

28:19 I didn't more. I was running caller service here in northern California. I mean, we were seeing pull throughs of one to five, one to six, one to seven depending upon what it was. I don't do that. Our pull-through is nothing like that because our maintenance programs are large, they may be 50, 70,000 dollars a year at a high margin. And... we're not getting those service calls. What that does is it allows me to leverage a lower manpower pool?

--- Pricing ends ---

DAN

28:54 Okay. So that's very interesting. I mean, so pull through revenue, right? Is kind of a big part of why you go after the maintenance contract, right? Repairs replacements have to happen at some point. And when you lock in the maintenance contract, you're able, to be there for the customer and make sure that you're on top of it ahead of time. You know, their systems are staying up and compliant. And when it comes time for those replacements, you're the one that gets the job. But is that, did I hear that correctly? Is that not something that you're going after really or no?

KCOLIN

29:28 We're going after all of that. What I'm saying, is because of the maintenance program that we deploy is so comprehensive. It doesn't yield service calls. That does not mean a technician goes out there and doesn't write up extra work. He does, he, you know, he sees things and then it comes through our internal process and gets filtered. Sometimes the service manager says, no, you know, that's a bogus rec, I'm not doing it. Sometimes he says, I'm just going to send an informational e-mail or a proposal if you will. That says, hey, be aware. This is something that should be budgeted for next year. Perfect. So, we're helping them manage their building that's the value add that we provide, which is why we're so got a full expensive.

--- Customer engagement ---

DAN

30:17 Well, that's good. You don't want to compete on price and compete on value, which sounds like you all are providing. And, and so, I'm wrapping my head around this and it's so, you guys, do, you know, pull through revenue is important to you and you do go after it and you do, you know, get some of it. But when it's...

--- Customer engagement ends ---

KCOLIN

30:37 We're not getting it on service calls is what I'm saying, so.

DAN

30:40 Not reactive.

KCOLIN

30:42 That's correct everything we're trying to do is planned and proactive.

DAN

30:45 Perfect. So, so when you say it's not a service call, it means it's not somebody calling in say, hey, something broke down that's because you all were already on top of it, you already made the recommendation.

--- *Deficiencies* ---

DAN

30:55 If it needed to be fixed, you likely already had that quote approved and sent someone out there to fix it.

KCOLIN

31:00 Yeah. I mean, there's basically three phone calls that a service call originates from. I'm too hot, I'm too cold or there's a water leak, yep or smell... if we get.

--- *Pricing* ---

KCOLIN

31:19 20 calls a year, 25, 24 calls a year. I'd be surprised.

DAN

31:28 That's awesome. I mean, I...

KCOLIN

31:29 Just don't...

DAN

31:32 Well, and that's I mean, that's exactly where you wanna be. And like you mentioned, allows you to lever. Yeah. Well, well, that's what we preach for our customers as well, right?

--- *Pricing ends* ---

DAN

31:43 It's much easier to manage things when, you know, what's coming rather than trying to fill in gaps for all the calls that you're getting from who knows who, right? Saying, hey, emergency here, emergency there, priority here, priority there. So that's the.

KCOLIN

31:59 Right. Definitely, you know, the business model. Yeah, you can preach it all you want because, there are companies out there with business models that says, hey, Dan, look, you're a great guy. We love, you know, for the month, we're going to give you 80 hours worth of maintenance. You go figure out the rest... and they better be a selling technician. So, when times are really busy, things are stepped over and when times are really lean things that are, were stepped over are picked up. And then sometimes there are other recommendations that are made that are... on the edge. I don't want to be there.

DAN

32:43 Yeah. Got it. Well, I think we've got the same goals in mind.

--- Purchase decision ---

DAN

32:49 So, I mean, that's just great to hear. So one last topic really shifting gears a little bit, and then gonna share my screen. We'll get into this but do you have a timeline? So, so I guess there's two versions of timeline, right? When do you expect to make a decision? And then when do you want to be potentially, when would you like to be live? Is there any deadlines you're looking at? Maybe it's end of year, end of your fiscal year?

KCOLIN

33:15 I was hoping by one January, but I'm running a time and that's because I just didn't have the time to spend during the summer that I had hoped... so.

--- Purchase decision ends ---

DAN

33:27 Quickly a busy time, right?

KCOLIN

33:31 You know, we're in times, you know, I know a lot of our large competitors are off 30 35 percent. So, you know, there's a lot of scrambling going on in the marketplace in the bay area with the rest of the world is doing I.

--- Purchase decision ---

DAN

33:46 Don't know. Yeah. Okay. So wanna be live by January one. And like you mentioned, you kind of are pushing onto, to the tail end of that right now.

KCOLIN

33:58 I'm not sure that we're going to be able to make it.

DAN

34:02 If you, if you were able to make it, you do yourself a huge favor, to, you know, make a decision tomorrow, right? And, and then I could be pretty confident, on getting you close to that Jan one day. But I understand if that's not, you know, realistic typically these things, you know, typically take a couple of meetings. So.

KCOLIN

34:22 Basically, we're looking at the end of Q1. So, Q1 is during the implement, you know, we work on the implementation process.

--- Implementation and ongoing support ---

DAN

34:32 Then maybe a launch date like kick off the project in January?

KCOLIN

34:37 Of...

DAN

34:37 2024 coo?

KCOLIN

34:40 Correct. Okay. Or let me kick off the project in Q1, it may not be January. It may be February. Okay. Gotcha.

DAN

34:53 Well, just to give you a little idea of our onboarding and implementation process, right?

--- Implementation and ongoing support ends ---

DAN

34:58 For a company your size, I wouldn't expect it to be any longer than 90 days depending on, you know, the products and the solution, that we end up, you know, getting together to match your needs for, you could be up to 120, right? And that comes in with integration, that type of thing.

--- Implementation and ongoing support ---

DAN

35:19 But the way it would work is let's just say for example, you signed up today, my first available start date to actually kick off your project would be November first. So there's a little bit of inbetween time. I'd still would schedule with your project manager in between that time leading up to your kickoff date, right? We get some things in place in you up for certifications, get your data, right? Start getting your data process, so that we make some Progress before that official kick off date, if you will. But that's typically when the actual implementation starts about three or four weeks after you sign up, if that makes sense. And so then from the November first date, that would be where we're looking at 90 days. So let's say you, did, you know, go with it tomorrow, November first. And then you're looking at being live around February first. So you just kind of push that back a month. If we make a decision, you know, towards the end of this month, you'd probably be looking at starting in December or we could start whenever you'd like, right? You don't have to take the first start date, but just want to give you sort of a sample size you could expect there.

--- *Implementation and ongoing support ends* ---

KCOLIN

36:26 All right. Sounds good. Alright. How many customers, how many technicians are out there using service trade now?

DAN

36:36 That's a fantastic question. I used to have that number off the top of my head. Well, let's do some quick math together. I'm gonna share my screen with you. So, so we've got some, several customers that are let's see you should be seeing company overview for.

--- *Type of work* ---

DAN

36:57 Okay. So this is sort of the snapshot of service trade, right? We've been around 10 years, over 10 percent of commercial industrial building service by technicians using service trade. So that might give you a sort of a rough idea, you probably know better than I do. How many texts are actually out there in the field in this industry?

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

DAN

37:18 Seven point 5,000,000,000 invoice through our platform just last year. So a lot of commerce running through it. We do now have over 1,300 accounts. This is a slide from I think two of this year. So growing rapidly, we've been a company for over 10 years and we were founded you know, for commercial service contractors, and we've stuck to our guns, right? We're never going to be looking to do business with residential, or the bug guys, right? We work with companies that have skilled laborers, commercial service contractors, but.

KCOLIN

37:47 Where does service trade come from?

DAN

37:52 So our kind of interesting story actually, so the, you see up here, it says for mechanical and fire contractors, right? Commercial mechanical and fire contractors. So we actually started in the fire protection industry and the person who sorta started building out service trade.

KCOLIN

38:09 The...

DAN

38:09 The app before it was called service trade, but they wanted a tool where they could better communicate with their customers, better track assets, right?

--- Forms ---

DAN

38:18 And better manage the pool through revenue associated with maintenance. So they started building this tool and, you know, I think they were using it, for several years. It was a fire contractor, right? So they have mandated inspection and then they need to pass along information to their customers to the authorities as well because a lot of legalities come in with, you know, if you've got repairs needed or if they don't pass inspection.

--- Forms ends ---

DAN

38:44 And then those repairs got to happen, right? They got to stay compliant. So, they had built out a system and it was obviously, it's come a long way since then, but my CEO 10, 11, 12 years ago got hooked up with them and that's where service trade comes from, right? And so we worked with primarily fire contractors for the first year or so but quickly realized that the workflows that we'll go through today, you guys have a lot of similarities, right? The industry as far as hey, for a fire contractor, really all of their service is planned proactive inspection type service on a recurring basis, right? So, you hope, yeah, you.

KCOLIN

39:25 In that world, they're not so good.

DAN

39:27 No, they're not. And they happen, right? They always, they do happen. But the model there was there for us to shift gears a little bit. And so quickly, I mean, we've been working with mechanical contractors for past eight, nine years as well. So, it was very quickly that we realized that and adopted... and the app obviously has grown a lot since then. But that's sort of the, a brief overview of where it comes from. Okay?

DAN

39:57 Yeah. And I have an interesting there's an article on our websites, a little blog post.

--- Access to information ---

DAN

40:00 I think it's about four minute read that talks about sort of, the founding process and I'd be happy to share that with you. You might find it interesting.

KCOLIN

40:08 And everything is cloud based, correct?

DAN

40:11 That's right? Yeah. And so for us, and like you mentioned, for us, the mobile app cloud based, right? And it's not a web application. You don't have to log into to a website, or browser, right? So, the mobile app completely functional, you can do things like work offline if you've lost connection, that kind of thing. So say our top of the line mobile application. And then the web application is typically what your office users and more administrative users will use. And it is all cloud based. So you can sign in from anywhere in the world as long as you got internet... access, the information you.

KCOLIN

40:52 Now on the handheld, do people, are people working on an iPad? Are they working, on a big smartphone or what are they? How is it? What's the easiest format to work from?

DAN

41:04 Yeah, great question. And really for me, I get 50 50 for my customers, we'll be on an iPad today. That's what I'm using, you can download the app on any android or apple products. So, the apple iOS or android iOS and it works on phones and tablets. Doesn't have to be a tablet, some folks prefer. Hey, I wanna stick it in my back pocket, carry it around. Other guys are like, hey, I'd rather a bigger.

KCOLIN

41:30 Screen. Yeah, I'm looking at since everybody's got an iPhone and a tablet, an iPad, and some of them have PC'S I'm trying to widow down, my, it costs here. So if it was, if it was easy to use on a, you know, a large iPhone as an example. That would be helpful in terms of payback.

DAN

41:56 Yeah, absolutely. Yeah. You shouldn't have a problem with that at all. Like I think it's 50 50, right? Some customers they want to give everybody an iPad, others, they just have their text using the phone, the latest phone that they have. And hey, you can have some guys on iPad, some guys on iphones, some guys on android phone, some guys on android tablet, right? It could be whatever they have right now

as long as it's the smartphone within the last about be safe. Let's say six or seven years, but probably I could go back a little bit farther than that.

--- Implementation and ongoing support ---

KCOLIN

42:25 And how often are you publishing updates to the app?

DAN

42:31 Yeah, great question, weekly and biweekly weekly. Only if there's something really pressing, right? And they're typically Sunday nights, but biweekly, we're you know, to make sure we're keeping up with, obviously, you know, you have an iPhone by chance.

--- Implementation and ongoing support ends ---

KCOLIN

42:45 I do.

DAN

42:45 Yeah. And it pushes out those system updates to and such. So as different operating systems update, we wanna make sure we're staying in line and make sure that everything, I'm not the brain guy as far as software goes, but no wires across and that kind of thing.

--- Access to information ---

DAN

43:01 So we're pushing out update weekly and BI weekly for the mobile application as well as the web app, and occasionally, or say occasionally, but frequently also when there are new features or updates like that, it'll be a more major update. It will release training modules to and such and so on.

KCOLIN

43:19 And so forth. So given that I'm just trying to think if, from a security perspective, since we locked down our iphones... how those updates get applied without a technician coming in saying I gotta get an update on, my app.

DAN

43:36 Yeah. So like any app when you download it on the iPhone or whichever device you choose, it'll have the option to, I'm sure you've seen this setting like allow automatic updates. And so it'll just happen in the background, you don't have to think about it. It doesn't matter where they are and if they're signed in or not, it's not going to request like your iPhone does. When they have a big system update, it's not going to be like that.

--- Access to information ends ---

DAN

44:00 We're we're got to update on Monday morning. Now. I've got to sit here for 12 minutes while my thing updates. So it'll just push out those updates. And typically, since we're doing them so often, it's very minor, right? You're not even gonna have there's no downtime for the application.

KCOLIN

44:15 So the update can happen even though the phones has a screen time pass code that says, don't does not give the user the opportunity to change any of the settings.

DAN

44:32 I mean, you got me there. I think we probably wanna look, but I, I'm sure it could like for mine.

--- Access to information ---

DAN

44:38 I have mindset on allow automatic updates for that app and it just automatically updates. So, I never have to think about updating the mobile app.

KCOLIN

44:46 Okay. So automatic updates, I thought was a global for all but you're saying you can do it for just one app?

DAN

44:55 I'm not 100 percent there, but I think.

--- Access to information ends ---

KCOLIN

44:57 So, yeah, I believe so. All right. I'm down in the roots but yeah, something we can.

DAN

45:04 The answer there. But yeah, I mean...

KCOLIN

45:07 I don't want somebody coming in on me every week saying I got to update service trade.

DAN

45:13 No. And the thing there too is like, hey, most of these updates are extremely minor, right? Just kind of back end wiring to make sure everything is working smoothly still. So even if you don't update, it's not chances are it's not going to affect the usage for the technician. For example, when I started here, I didn't realize that I should set it to automatic updates. So for the first year, or possibly maybe it's a little less than a year, but several months I went without updating it. And then we made a change to the way that a, so something that actually changed functionality just to the way that the technicians send out their in route notification to customers. And I was wondering why mind still looked like the old version and I found out why, but I've been working without installing updates, for four or five months, possibly longer. So if that gives you kind of an idea. Okay? But Kevin, let me go through a little bit. I think it's good to paint the picture a little bit of where service trade drives, and really what our goals are for our customers that I'm gonna open up the, you know, the nuts and bolts and we'll go through a job, and walkthrough customer location and a lot of what you showed me.

--- Customer engagement ---

DAN

46:25 But really for our customers right now, they want to control costs and grow their quality revenue. And that's how we help them. So focusing on proactive work like you've, talked about a lot of, a lot of what you spoke about, right? You kind of stole my pit, fill my thunder. And I don't want to sound too agreeable. But how do we help you do that, right? So provide you with an updated system allowing you to see everything that's going on day in and day out, right? Manage with visibility, understand different things like, hey, which texts are driving more than they're working? How many technicians, or how many work orders do we have repair opportunities on? What type of work is our, most of our revenue coming from, right? Full visibility into all of your service operations. So that, you know, what might need some attention, where you're driving and just where everyone is at all times, right?

--- Customer engagement ends ---

KCOLIN

47:17 So, with respect to that screen that you were just showing and I'm gonna have a hard stop here about 10 10.

DAN

47:23 Okay.

KCOLIN

47:24 Just fyi with this in, is this based on permissions?

DAN

47:31 It is, it is okay. Yes, sir. And I appreciate you let me know that with the hard stop. So I really want to get through this, at least get to reporting or fair opportunity, getting a service report out to your customer. So I might start talking a little fast, but you feel free to slow me down, but I definitely wanna make sure we're able to see some of the product here.

--- Assets ---

DAN

47:56 Yeah, that's great. Okay. But when it comes to technician, right? Kevin, so we wanna make sure they have everything they need. You mentioned them having service history, write specific asset information, paperwork, anything from previous jobs that's going to help them all the touch of their fingers. So they're not calling around, make it easy for them to log everything in there as well, have it sync back to the office.

--- Access to information ---

KCOLIN

48:16 Go back to my screen. Go back to that screen please. So what am I looking at here? This?

DAN

48:23 Is the mobile app for the tech?

KCOLIN

48:25 Okay. So semi maintenance and inspection equipment. Okay? So that's... the high level view, but it doesn't tell me any. It says building 12. Okay?

--- Customer engagement ---

DAN

48:39 You know, I think so, these slides, right? And I'm just gonna sort a click through. These are, these are snapshots we're going to get into the actual product here in about 30 seconds. Okay? But just kinda giving you an idea of where our focuses are, right? Given the technician, everything they need, being able to see your service agreement, pipeline, sales pipeline being to see repair opportunities come straight through the service trade. So this will be your blue sheet, right? And we'll walkthrough one of these, being able to present a quote quickly to the customer with photos, one click approval process and being able to give the customer a portal where they can log in the upcoming jobs, recently completing jobs, service reports, any highlights or alerts that you have, right?

--- Customer engagement ends ---

DAN

49:20 Like you mentioned, if you've got some recommendations that might not necessarily require a quote at the time, but you still wanna make them aware that's where you're gonna have a deficiency there. But yeah, it sounds like this would be much more easy for us to or much more productive for me to open up the actual platform here. So that's what I'm gonna do... and what I wanna start us on here. Kevin is a contract page in ServiceTrade. So just the...

KCOLIN

49:46 Meeting this contract.

DAN

49:48 That's right. Okay. So I don't think we'll have time to go into all of, our, you know, building that contract and tasking and all of that today. I do wanna walkthrough some of the basics though, and I have some material. It's actually a self demo of the tasking and of the maintenance build out that I think would be very helpful for you. Take five, six minutes for you to walkthrough a.

KCOLIN

50:09 Do... that should?

DAN

50:14 Able to, are you mean as far as using it or as far as looking at what I'll send you?

--- Recurring maintenance ---

KCOLIN

50:18 Yeah. What you're going to send me?

DAN

50:20 Yeah, I think you should be able to view it on an iPad and I don't think that'll be a problem.

KCOLIN

50:24 Okay. All right. It's just from a timing standpoint when I would do that. That's all sure. Yeah. Okay.

DAN

50:31 So top golf is our customer today, top golf corporate, right? So you may have several offices locations underneath or, yeah, customer locations underneath top golf. But once, you can see all of these if they're all under the same maintenance agreement, right? You can see how you're doing and the performance of that agreement throughout its lifetime, it different reminders on, hey, when they're upcoming on renewal.

--- ST app contracts and pricing ---

DAN

50:55 If you've got specific codes or item price specific attachment, anything specific about the contract, it can all be logged here, but automatically be applied for any job for that customer. So probably similar to what you have now with what you're doing as far as applying contract. So we're going to go to our customer here.

--- Recurring maintenance ---

DAN

51:15 Now, this is the top off corporate. Now, we have six locations for them. So those are the job sites that you were mentioning, right? The same structure here?

KCOLIN

51:23 Okay. Let me stop you there. So what happens is you need to go to, the customer location to get to the job site location. Is that correct?

DAN

51:36 I mean, you don't have to, but that's where the jobs are all gonna tie back, to organize.

KCOLIN

51:40 Okay. Yeah, I'm just trying to think of our work flow and what we're accustomed to doing that's all. So, why go, right? I could go right to top golf, alberkerki.

DAN

51:51 Yeah, absolutely.

--- Assets ---

DAN

51:51 Right. So you don't have to click through a certain process here. For example, you see the search bar up in the top, right? Without searching here, without going to this page. This is a universal search. I'm just gonna pull up our job for today... type in the job number there.

--- Recurring maintenance ---

DAN

52:06 It is, right? So you don't have to navigate per, it's not like a tunnel, right? You can go, you can skip a step anywhere you want, but I do wanna show you top of San Jose, which is where we'll be heading out for service today. We go to that job page. And so, the reason I'm sort of looking at it this way is just to give you an idea of the structure, right? And I think it lines up very much with what you guys are doing now, but you've got your different contacts at the location level. You can also have contacts at that company that built to level if you will.

--- Assets ---

DAN

52:37 Okay? But this is everything you need to know about this customer. So services, for example, the different checklists for exactly they're tied to an asset, right here's,

your asset, the service window in which...

KCOLIN

52:51 Where, where's the asset? I'm sorry, this is the asset system. Okay?

DAN

52:56 And so this is high level, right? As far as the information there, we're going to get into more specifics on what the asset level information can look like. But you've assigned your service to the asset, right? And I think setting one of these up sometimes is the easiest way to describe this. So, for example, I'll use a template.

--- *Quote templates* ---

DAN

53:13 These are all the assets we have at this location. Okay? So for our hvac unit, maybe I wanna sign our hvac and you can have as many templates here as you'd like to.

KCOLIN

53:24 Now, can I assign multiple templates to that asset?

DAN

53:29 Absolutely.

DAN

53:34 And so the contract here that's gonna determine all the pricing here's, our checklist and this can be as detailed as you need it to be.

--- *Recurring maintenance* ---

DAN

53:41 Let's say we want to have preferred technicians. I can do that as well. And then window, we're not right? You can go. You can just set up a recurring service, say a quarterly visit. It could be that simple, but obviously, that wouldn't be as helpful as doing all this. So we've already got all of our parts and what we'll need for this service as well built into the service. So once I save this, it's a set it and forget it. And similar to what you're doing now, as far as running that report for the next month, it'll generate tickets with all of that. We're gonna look at that in one second. But I think you'll appreciate the asset overview here. So I'm gonna go to our asset here. And like you mentioned when we have an asset that's got multiple services tied to it, this could be a monthly visit, quarterly visit, annual visit, right? Different types of visit.

--- *Assets* ---

KCOLIN

54:39 Got a call support.

DAN

54:41 There we go. Yeah, could be, my wife. I here, who knows? But we're still rolling. So you'll see there are required fields. I mean, you can have an extensive amount of information in here.

KCOLIN

54:59 Go back up. Okay? So parent asset that's interesting. Okay?

DAN

55:05 Yeah. So if you've got a commercial building right? With hundreds of rooftop units, you could say we're in different situations, different scenarios, but you could group the rooftop units but still have their specific data, right? But say, hey, this is the west rooftop. We got 16 units up there and then each one underneath that. So you might schedule those for the first few days of that maintenance or something like that. But there's different ways to group them or if you've got a compressor underneath an hvac unit, that type of thing specifically track the compressor, you could.

KCOLIN

55:37 Do that as well. Okay? Because what we're doing, is once an asset number is assigned that's how we're tracking it.

--- Forms ---

KCOLIN

55:45 So my question is that where the parent asset drop down, is there, is that something that can be removed from a you? So that's not confusing to people?

DAN

55:55 Yeah. I mean, that's I don't know that it's going to be removed, but honestly, I've rarely even seen it. It's not something that it prompts you to do when you create assets only when I go in here to edit.

--- Assets ---

DAN

56:07 Did you know this is one of the first time I've seen it in a while, but if it's not useful for you, then you just don't have to do it. But like you mentioned with services, looks like I've only got one service tied to this asset. Let's go over here. But yes, you could have multiple services tied to the asset, whether it's quarterly, different types of services, all the different jobs specifically related to this equipment deficiency. So that's all the repair opportunities, right? Let's show the fixed ones as well related to this asset. Any quote, any attachments tied directly onto the asset, and any comments from technicians or office folks previously about work done here or something that might be important about the asset?

DAN

56:58 So, in terms of asset information, what are your thoughts there? Does that look like it's lining up with your needs?

KCOLIN

57:05 Well, you know, you're bolting through it pretty quickly and I'm trying to, I see that if you scroll down where you've got this asset, right? Go back up where it's got the description. Yeah. Okay. So it says quarterly, it's 500 dollars a quarter. I don't what's the two mean?

--- *Recurring maintenance* ---

DAN

57:25 Two hours?

KCOLIN

57:26 Two hours per quarter? Okay? And that's the rooftop zero two. Okay? And then that's the tasks. Those are the tasks assigned to that asset per quarter.

DAN

57:36 That's correct? So.

KCOLIN

57:38 What happens if you don't Bill on an asset basis? You're billing on a global basis for the site. Sure. Yeah, you.

DAN

57:49 Set up your recurring invoices that way to where you're just billing. And that's how you would need to do it. Is that correct?

KCOLIN

57:57 Yeah, that's how we do it. We don't Bill on a per unit basis.

DAN

58:01 Yeah. And that's fine. Right? You don't have to, you don't have to do it that way that could be built into your contract with them and your recurring invoice schedule with them.

--- *Recurring maintenance ends* ---

KCOLIN

58:11 Okay. And then from a labor standpoint, what we're doing, is we're not assigning labor to that unit. We're assigning labor to that month of service for all of the units... how would that work? So, what?

DAN

58:28 It's your goal with the, with what you're trying to do there. I guess what would you need the system to provide?

--- Assets ---

KCOLIN

58:37 So when a technician gets a maintenance job, they get all the tasking, they get the units, the associated tasking, and then on the top highest level of that maintenance job, they say, okay, I've got 16 hours to complete all of this tasking.

DAN

58:59 Exactly.

KCOLIN

59:01 But it's not, we don't input it by asset. We don't put in labor hours. We're putting it in for the service month.

--- Assets ends ---

DAN

59:12 Okay. And so then they just get it done sometime in the month.

KCOLIN

59:16 Correct. They'll be dispatched to it... but they will... hold on a second. Got pop ups popping up. Okay? They'll get dispatched to it because they may land up starting the maintenance spending a day and then they have to pull off to go do something else and then come back to it?

--- Tech time tracking ---

DAN

59:44 Sure. So, the main thing is you need to show them that this job is going to be 16 hours or this job is going to be eight hours, correct? Okay. Gotcha. And I know we've only got 11 minutes left here. So I'm gonna pop out here through the field.

--- Customer engagement ---

DAN

1:00:00 Go ahead and punch in, notify the customer. I'm just gonna do this really quickly, right? But this is one of the things service trade does a great job of is getting your brand out in front of the customer, a lot more interaction with the customer. More often, so than just when you're sending an invoice or asking them, for, you know, we're telling them about a problem, right? So, you know, you talked about providing value service paid, really wants to show your customer all the good work

that you do. And a lot of that's built into the platform, but we're the technician view here. We have our services now. I'm gonna go back to our schedule page.

--- Dispatch ---

DAN

1:00:34 So if they've got scheduled jobs, right? There was an estimated time here would show up. Looks like you didn't have one on this particular job, unscheduled jobs. And then you've got, you see the time right here... priority service call. So those that information would show up here. It looks like nobody really built this 711 job out very well... demo account. You'll have to pardon some of that stuff, but it will show them the.

--- Recurring maintenance ---

KCOLIN

1:00:58 Yeah. Which now, can you differentiate between a maintenance job and a repair job and a service called job through your job number or are they just job numbers?

DAN

1:01:09 Yeah. So you see preventative maintenance here? Okay. Yeah. And so I think there's about 40 to 50 different options and when you set up your account, you would select maybe a handful that are relevant to you or if all 40 you wanted to use all 40, that's fine too. But typically that's not the case. All right. And that's the same thing when you set up services, right? They would have a type of job. Also equipment has a service line. So you can look at all the maintenance associated with, you know, hvac, all the maintenance associated duration, so on and so forth.

--- Deficiencies ---

DAN

1:01:43 Okay. So for the tech, their services are here. Now... you could see the checklist here, attachments if they need to add it directly on the service. So here's what I did today. I'm gonna add some pictures you're gonna stay directly in the application when you add those and.

--- Deficiencies ends ---

KCOLIN

1:02:03 Estimated, can you turn off the estimated price?

DAN

1:02:06 You can. So I have all of the visibility turned on for me right now just so I can show things when I need to, but you can absolutely limit that for technician. Great question. So I want to jump to asset real quickly.

DAN

1:02:23 And actually before I do that, what you mentioned earlier with, I mean this could be in the service checklist or comments on the location page or the asset, right? But letting them know what tools they need for the job, right? That could be in any of those locations, but making sure that it's identified, it automatically shows up on each work order associated with those types of equipment. So this appointment, it's pulled these four assets. Hey, this is what we're working on today, technician has access to all of the equipment at that location, no matter if they're working on it today or not. So if something comes up, they're able to look over any related equipment related to those H units for the appointment today. But today, hey, we're just focused on these four. So let's take a look from the technician view at the asset. So this service history is going to be specific to this equipment. So when you're working on hundreds of pieces of equipment, you don't wanna roll through every last work order associated with the entire location. So it's just drill down, right? It looks like we cancelled this last week. Here was a repair we had that got cancelled maintenance job. So when they click in there, it will show all the previous detail from the job I had previous.

KCOLIN

1:03:31 Now on that view, can they click in and see the actual work performed? Absolutely? Yep, they can.

DAN

1:03:38 Down to one that was completed here's, a repair, completed. The services that were completed here are the attachments, videos and pictures... here's. The job items that were used here's. The technician that did it, right? So everything that they need will be right there. Okay? And we're going to break that service history down a little bit further though deficiencies, right?

--- Deficiencies ---

DAN

1:04:05 So that's anytime there's been a reported repair opportunity or issue with this equipment. So here they are, right. We've got 42 that are open. And if we wanna look at let's say fixed as well roll down here. See if I can find a fixed one, it looks like I'm not fixing enough deficiency to this particular asset, but we take a look at these, the attachments involved with them.

--- Deficiencies ends ---

DAN

1:04:28 So hey, it looks like we have some outstanding repairs and my screen share just stopped. So give me half a second here.

DAN

1:04:39 You think with a Mac computer and an iPad, that screen mirroring would not be such an issue, but it always seems to be for me.

KCOLIN

1:04:47 I go to windows.

DAN

1:04:51 But...

KCOLIN

1:04:51 I say go to windows. It always works.

DAN

1:04:54 I know I was on windows and they gave me an apple computer, the company did. So I kinda had to, I don't know. I tried it... but yeah, here we are, we're back on screen. So the deficiency specifically, what happened, right?

--- *Deficiencies* ---

DAN

1:05:07 Who reported it? And the status of that. So if you've got a lot of open deficiencies, you probably know what you're walking into, you probably still looks like that right? Then specific attachment tied directly to this asset. So, hey, I wanna see exactly where this is. Where if I've got a video, anything that you need really here from previous technicians?

--- *Forms* ---

KCOLIN

1:05:28 I...

DAN

1:05:29 Can be included to right onto the asset. So they don't have to look anywhere. They know everything they need to know about the equipment.

KCOLIN

1:05:39 Is there a screen there that shows refrigerant type... there is?

KCOLIN

1:05:51 There it is right there. Okay?

DAN

1:05:53 We got it. Yep. Okay. Yeah. And when you learn about assets and the way that we've got them set up different required fields in each one or different fields that you

can fill out.

--- *Forms ends* ---

DAN

1:06:05 And it's typically, yeah. So glad that I covered that one in one of the ones I have set up here.

KCOLIN

1:06:15 The, okay. What's that now there's a lot there for the technician view?

DAN

1:06:22 How does that? Do you feel like that matches your knee?

KCOLIN

1:06:27 Well, see, one of the things that we have is there's too much on, the technician view. They, you know, it's very difficult to get them through a workflow because they open up, the app and the, and they see like all this stuff. And what they do is they see really skinny down to what do I absolutely need to focus on? Yup. You know, payroll entry, work performed, checking the task lists that's pretty much what they focus on. One of the reasons is because what we have, the tool that we have for them is, you know, it's complicated and it's not easy. It's not intuitive. So when I'm looking at this, you know, the first thing I'm kinda taking a look at and thinking, okay, what out of all this can I remove to make it simpler for the technician?

DAN

1:07:21 Sure. Yeah. And, and so... that's the goal, right? And I know I've showing you a lot here. I thought you'd appreciate the amount of detail that you do have because of the way that you're tracking gas that you can limit some views at the end of the day.

--- *Assets* ---

DAN

1:07:38 You know, they don't have to look at any of the service history of an asset unless they need to. It's just there. If they need it, they'd just be going into the services, going through your task list there and checking things off as they go. Now, when they come to a repair opportunity, really simplified workflow for that.

--- *Deficiencies* ---

DAN

1:07:55 And that's called the deficiency. So instead of that blue sheet, think of this as your blue sheet, right? I'm gonna add an efficiency... compress or replace.

KCOLIN

1:08:05 Okay. So it's a free form text field. Okay?

DAN

1:08:08 Yup. And we'll go ahead and add attachments right here in the app. So I'm staying in the app, just gonna take a photo. I can add a description here if I need to... add a video here if I need to.

KCOLIN

1:08:22 Wow. They're...

DAN

1:08:25 Describe exactly what's going on. You see the asset, right? This is gonna pick up audio as well. Could also add a audio memo. If I need to level of severity. So you mentioned some are just suggested some really need to a pen and sometimes everybody knows about it.

--- Assets ---

DAN

1:08:40 It's inoperable, but we'll go ahead and mark that. We're gonna tag our asset. Now, when you type in the first few letters or numbers here of the asset, it'll pull up the correct one associated with the serial number.

KCOLIN

1:08:50 If you do, if you don't know the asset, can you do a look up?

--- Deficiencies ---

DAN

1:08:55 You can yep search field there or by bar code if you wanted to do it that way but not require. And this is a new deficiency, right? So if we didn't fix it, we're gonna mark it as new if it was something minor and we fix it. Well, market is fixed. Verify means the customer knows about it. We'll leave it at this point. If I need to add a proposed solution down here at the bottom, I can typically the video and such will describe the issue. All right. So there we have it. So for that repair opportunity, now, I know that you've got a hard stop in 50 seconds.

--- Deficiencies ends ---

DAN

1:09:30 So I'd really love to show you what that looks like as the information comes back to the office, but do we need to do, we need to set up another time?

KCOLIN

1:09:38 Well, we're going to have to set up another time, but I'll be right back. Okay.
What I need to do is, move something. So.

KCOLIN

1:09:52 All right. Another 10 minutes. Will that work?

DAN

1:09:57 Yeah, we can get through, the gist of it there in 10 minutes.

KCOLIN

1:10:00 Hold on.

DAN

1:10:01 Sure.

--- Tech On-site ---

DAN

1:10:14 Okay. All right. So, I'm going to, I'm just gonna punch out here and obviously, there might be some things like signatures and such that the technician needs to collect. We're gonna make this quick though, because really what I want to show you is routing that deficiency. Yeah.

KCOLIN

1:10:33 Really curious to see how that works.

--- Deficiencies ---

DAN

1:10:35 Perfect. So as a matter of fact, let's just skip that because we're under on. You can definitely circle back to it. So we're going to I'm gonna pull up the, my e-mail so this can, you can have this automatically notify different people in your office. So here's the deficiency reported.

--- Tech On-site ---

DAN

1:10:54 And Dan still clocked in on the job, right? He hasn't finished his work, but I'm getting this in real time but this is just one way to pull it up. I always like to point out the e-mail notifications but obviously, it's gonna be on the job as well.

--- Deficiencies ---

DAN

1:11:05 So you'll see it in the service trade application. But here we are. We've got our San Jose location there's. Our asset impress or replacement was recommended here's. The job number, the sales person assigned was automatically, Dan, it could be someone else if you said it differently. Reporter was Dan deficiency history. So one report two minutes ago, related deficiencies over the last two years, it looks like we've had 127 different related items for, this equipment. So it's pulling all of the related repair opportunities for that equipment and their status for a quick view of it before you make any actions on this. So if this happens over and over again, really easy to see. Hey, mister customer. We might need to do something a little bit more major this time around and tying it back together... and the attachments come over, right? So... all we need to do here is generate a quote.

--- Quote templates ---

DAN

1:12:01 Well, we don't have to set an expiration date. Everything's pre filled based on Dan's you know, report. I can make adjustments if I need to. Though gonna go ahead and create quote... and apply a quote template. Now, you can build out as many templates as you'd like here, compress a replacement, might have a couple of those, the description for the customer, the expected parts items, labor fees, you're not locked into this. So if I need to add something.

--- Parts management (inventory) ---

DAN

1:12:36 Whether it is a item in our item list or an item that is brand new, I can add those here.

KCOLIN

1:12:43 The technician doesn't the technician doesn't do that. He doesn't specify the parts that he needs.

DAN

1:12:49 He could do that if you'd like to on notes on video but you've got, the goal here is to take that administrative work out of his hands, right?

--- Assets ---

DAN

1:12:57 You've got the part, you've got the recommendation, you've got the asset, the model number, you've got the video, the attachment. So instead of slowing a tech down with all of that, you're able to get that efficiency report and understand what you would need.

KCOLIN

1:13:12 Okay. That's a, that's a real major flip for us because what we do, is, we have the technician call the parts house specify exactly what it is that they want.

--- Assets ends ---

KCOLIN

1:13:26 And the reason, is because we're not maintaining inventory and there is just so for, in many different parts that everything that we buy is to a job. And... sure, I'm assuming, the skill set of my office staff technically other than the service manager is lower than the field staff. Sure. So how you handle?

--- Quote templates ---

DAN

1:13:56 The quote in?

KCOLIN

1:13:58 Well, right now, it's primarily the service manager, but I would prefer him not have to sit at his cost, go in and then now start picking parts for a typical compressor replacement that may not fit this application. So, I would much prefer to follow the method that we have now where the technician is saying, hey, these are all the parts I need and yes, I need a crane too.

--- Quote templates ends ---

DAN

1:14:29 Sure. So they could do that. They can absolutely do that for the purposes of today. We're just gonna keep moving forward. Let's say that they went ahead and applied those though. Okay, you are going to have templates and I do want to circle back to this at some point and talk about the way service trades able to streamline this process, and empower people that don't know much about the industry in order, to allow them to send out these quotes and help take that administrative burden off of the text that's...

--- Purchase decision ---

KCOLIN

1:14:59 A lot.

DAN

1:14:59 Of what our platform is designed to do. So, I'd love to expand on that conversation and I kinda hate rushing it, but I do know we're under a crunch and I, I'd love to get your feedback on what you think about this when it hits your inbox.

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

DAN

1:15:12 So I'm gonna send this out to you. Attachments are pulled over. You've. Got the company, right? The Bill to contacts as well as the location contacts. You can send

this to multiple people here, which I will do. And I'm gonna pop up, a full screen imagery on my side as well, but you should have it in your inbox.

--- Quote templates ---

DAN

1:15:32 This is the quote to the customer. You got the one click approval process. You can lay out the description here in 12 different formats as far as if you want to show line by line if you don't want to show any of this just the grand total, right? Really up to you how you want to present that.

--- Quote templates ends ---

KCOLIN

1:15:49 And is that one format and it goes for everybody or can you set that format up by client?

DAN

1:15:56 You sure can. Yep.

KCOLIN

1:15:57 That's great.

DAN

1:15:59 Yep. So terms and conditions can be per client, right? All of these different factors could be per client and the presentation.

KCOLIN

1:16:05 As well. That's really professional looking. Excellent. Now, where does it say asset number?

DAN

1:16:19 Let's see. I just switched off that screen. There we are.

KCOLIN

1:16:24 There we are, okay.

DAN

1:16:28 So, it sounds like it's important for your customers as well to see their asset information and they're tracking that on their end.

KCOLIN

1:16:34 Yeah, because a lot of times what happens, is, you know, the level of engagement between us, whether it's me or a service manager with, the client is

pretty intensive... you know, when you're sitting down knee to knee, saying once a year saying, hey here's a picture of your building hvac system and what it's gonna look like next year. It's really close and personal. Absolutely. So, yeah, most of them really do appreciate, this asset concept which is where the market is going.

--- Quoting ---

DAN

1:17:17 Absolutely. Well, I wanna make sure. And with our last three minutes here, kind of the to wrap up the didn't necessarily get to wrap up, all the benefits to the way that this quoting system works. But you could see all the activity here. Now, if you open the quote, right? You'd be able to see visibility on that, go to your quote dashboard as well as the efficiency dashboard run.

KCOLIN

1:17:41 So, so back for a second. So, if the receiver opened the quote, it would come back and tell us...

DAN

1:17:50 That's correct. Okay. And you can get notifications on that as well to your inbox, but you'll have a quote, the quote dashboard, which will also help you with that. So I can look at for example, all submitted but not viewed by client quotes. Maybe I wanna look at only, the low hanging fruit, the inoperable systems, but I can send these back out to the customer. I can have them set up on a timer. Hey, if nobody opens it in the first 24 to 48 hours, all of them go back to the top of the inbox that, in or I can just bulk do it on my own but really track in your pipeline here, and make sure you're managing all of your opportunities by the status of the quote. After you work, you put them together.

KCOLIN

1:18:30 Wow. Okay. So is there a spot there? So let's say the client calls and says they've got a bunch of questions. You, you have a Q and a telephone call. Is there a place to document that in there?

DAN

1:18:46 Sure. We'll go back over to the quote here and I opened it up in one of my ass here just so you can see what that looks like.

--- Quoting ends ---

DAN

1:18:53 But yeah. So client calls in now, what they could do, if they had a bunch of questions, right? They might need to call you, but they could also submit and make changes and put all their questions there. It would show up in the comments portion. I can also add that comment though if I need to, now, this might be internal, but it could be for everyone.

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

DAN

1:19:10 So if we want a document facing the customer as well, we can do that. But client comments will come in here as well if they requested changes.

KCOLIN

1:19:19 Now, if they came in and sent it that way... what's the notification process of that? So it's not missed.

DAN

1:19:27 So if there's a request change, yeah.

--- Quoting ---

DAN

1:19:30 Yep. So similar to this where when I opened this, one of my aliast accounts here, it sent me an automatic e-mail saying Danny, right? Had viewed the quote. If I requested changes, I get, Danny has requested changes, right? And then it takes you, it gives you a hot link right there to the quote. So it takes you directly there. Okay?

--- Recurring maintenance ---

KCOLIN

1:19:49 Okay. And can there be multiple e-mail notification addresses internally?

DAN

1:19:54 Absolutely. So you'll see with this one, for example, this went to about 12 people at my company.

KCOLIN

1:20:00 Yeah.

DAN

1:20:02 And per customer, if you had account managers, for example, you could have per customer routed to those account managers and set up differently depending on what notification it was.

--- Recurring maintenance ends ---

KCOLIN

1:20:12 Okay. Yeah. What we would do is we would just have it set up going back to the person who sent the quote and going back to a generic e-mail box that we have. Perfect. Okay. Well, this is impressive. This piece just in of itself is impressive.

DAN

1:20:34 Well, I'm glad we made it to that part and I'm glad to hear that... what was your biggest takeaway from, the last few minutes here?

KCOLIN

1:20:45 Well, it's really deep. It looks like the usability is once you're familiar with it is probably, it's easier to transfer that knowledge to a new person because of, the modern look and feel, you know, on the side or really simple to use, you know, I like all that. There's a deeper dive that would need to be a much deeper dive needs to be done on all the other aspects of the program. But, you know, what gets delivered to the technician is something that I'm really sensitive to and, you know, I'm more of the type that says, okay, we roll out something and it's very restrictive of, we provide them.

--- Access to information ---

KCOLIN

1:21:31 And then as time goes on and comfort goes up, we roll out additional information. You do that on a per user basis.

DAN

1:21:40 As far as permissions?

KCOLIN

1:21:42 Yeah, absolutely. So one technician could have one view and another technician could have a different view.

DAN

1:21:48 That's correct?

KCOLIN

1:21:49 Okay. So you could set, okay, that's great. Okay. And then the last question before we go is if I'm in the field, the service manager is in the field and he wants to go in and take a look at something. Does he use the, do I use the app or do I log in through the web portal?

DAN

1:22:11 So really both... depending on what you're looking for, right? The application itself, the mobile app actually has a way to go through the web portals, for things, for example, if you're a service manager and you need a more detailed view of let's say scheduling or this at the other.

--- Access to information ends ---

DAN

1:22:29 But I mean, it's probably a more broad conversation we'd wanna know what you were looking for, right? And I'd make the recommendation of, hey, easily done in

the mobile app or this is typically something that you need to do in the web.

KCOLIN

1:22:42 Okay. All right. You're gonna send me a link that I can sit and kinda go through.

DAN

1:22:50 And, yeah. So this is, I started and I just sent actually an invite to this workspace, it's service trade cli metrics, Mutual action plan. And so you can see, I haven't done much to build this out yet. I've been trying to build it out a little bit as we go. But this is supposed to be a helpful tool where if you need to talk with other folks at your company or if you need to sit down and review on your own, all the things we've talked about will show up right here. And I'm going to add a couple of modules based on our conversation. So just bear with me a little bit this afternoon probably or at the latest by tomorrow morning. I'll have this built out but does this look like it would be useful as far as, hey, kind of planning next steps, collaborating and reviewing what we've looked at?

KCOLIN

1:23:34 Yeah, I think so. Because then I assume I'd be able to copy paste or upload a list that I made that I have.

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

DAN

1:23:41 Absolutely. So you can drop comments and such here. I'm not sure about adding attachments. I think that's okay. I might have to change it in my settings to allow it. But either way, I'll be sending you an e-mail this and you can always send that attachment over to me or give me a call.

--- Dispatch ---

DAN

1:23:56 So we'll make sure they get in there. But so in terms of next steps, and like I mentioned with the comment thing, right? So this is something you can tag me right here. Say, you know, hey at Dan or hey, Colin and I'm sorry, Kevin called your last name there, but it doesn't matter.

--- Purchase decision ---

DAN

1:24:15 So in terms, of next steps, right? Typically, we've done our initial product demo and we didn't necessarily get to make it through everything that I would like to talk about. So would it make sense for us, to schedule some time, you know, in the upcoming days?

KCOLIN

1:24:31 Yes, because there's a whole bunch more stuff, but what I need to do is go through what it is you're going to send to me one two, I need to send you my list of the topics that I wanna make sure that we cover.

--- Purchase decision ends ---

KCOLIN

1:24:48 And I'll need probably a week to do that. Okay? Maybe a little bit longer. I have a major deliverable due on the eleventh. So probably it's going to... be the week of the sixteenth before I can get it to you. Okay?

KCOLIN

1:25:16 Hold on a minute, correct? No, I was, somebody was poking their head in my door.

DAN

1:25:22 Okay. And great. Well, we'll get wrapped up here. I know you've gotta run. So I appreciate you expanding your time today. Would it make sense then to, I mean we can click some time for next Thursday around the same time and I'll call you or communicate with you ahead of time to say, hey, are we ready for this meeting again?

KCOLIN

1:25:41 It's not going to happen on Thursday. It's just, the client commitments that I have. Okay, usually, I'm two weeks out. I'm kinda cutting myself short by saying the week of the sixteenth... why don't we set something up for... let me look at my calendar.

KCOLIN

1:26:20 Why don't we set something up tentatively for the nineteenth?

DAN

1:26:24 Okay. So the nineteenth happens to fall on my company's quarterly business review day. So I'm gonna be pretty tied up that day. Could you do either the eighteenth or twentieth?

KCOLIN

1:26:42 The twentieth? I can't... the eighteenth, no negotiations. So, well, let's see, the 20 sixth.

DAN

1:26:57 26.

KCOLIN

1:26:59 I'm wide open that day.

DAN

1:27:02 Sure. So I could do two PM on the 20 sixth. Would that work?

KCOLIN

1:27:09 Two P. M. What time zone?

DAN

1:27:12 Your time? You're California, right?

KCOLIN

1:27:14 I am. Where are you guys? Where are you?

DAN

1:27:18 I am personally in North Carolina. Our headquarters is in Durham, North Carolina, but we've got staff throughout. I've got two field reps over there in California, and actually, our director of sales in the west coast lives in California. So we got people scattered across the country.

KCOLIN

1:27:32 Okay. Well, let's pick a day where it's earlier in the morning because what happens is the day progresses and things pop up. Sometimes my afternoon just become you get an e-mail saying, sorry, I gotta reschedule.

DAN

1:27:45 Sure. Well, I could do eight a. M on that day, the 20 sixth?

KCOLIN

1:27:50 My time, sure.

DAN

1:27:52 Okay. And I know that's three weeks from now. So I'd love to have whether it's a quick chat, 15 minutes on the phone five minutes just to touch base in between now and then to make sure you've got what you need that type of thing. So if you don't mind, I'll probably give you a call. Sounds like you're pretty busy, but towards the end of next week, would it be all right for me just to reach out sorta follow through on what we've talked about?

KCOLIN

1:28:15 Not next week, the week of the sixteenth?

DAN

1:28:20 Okay.

KCOLIN

1:28:20 I just got too much stuff, too many deliverables the next week that I've got a, I've got a go into engineering mode on.

DAN

1:28:28 Sure. Understood.

KCOLIN

1:28:31 Yeah. So that, that's fine. But my commitment is I'll go through the information that you send to me and I'll send you my list of hot topics.

DAN

1:28:42 Perfect. Great. Well, we've got a date that we can circle back on set for that. And yeah, no, no pressure to pick up if I reach out, but, you know, if someone comes up, definitely feel free to reach out to me. I'll keep an eye out for the list from you and I'll let you know later this afternoon, although I already sent an invite to that work base. I'm gonna send another e-mail just letting you know, hey, I've completed it, added the resources we talked about and look forward to, you know, continuing the conversation.

KCOLIN

1:29:11 Okay. Very good. Thank you very much, Dan. I appreciate your time.

DAN

1:29:15 Yeah, thanks a lot. I appreciate it. Bye.

KCOLIN

1:29:17 Yeah, I look forward to the next call. Take care.

DAN

1:29:19 Me as well. Yeah.

The End