

ServiceTrade Demo with AMC Commercial HVAC

Joseph Summerell with Coastal Fire Protection Company Recorded on 4/14/21 via Zoom, 56 min.

Participants

SERVICETRADE

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Topics

ST app contracts and pricing
Recurring maintenance 2:56
Paper process 3:15
Paper process 4:37
<i>Deficiencies</i>
<i>Pricing</i>
<i>Customer engagement</i>
Customer engagement (quoting and invoicing) 8:29
<i>Customer engagement</i> 8:51
<i>Pricing</i>
Recurring maintenance 10:14
Assets
Recurring maintenance 11:17
<i>Tech On-site</i>
Assets
<i>Pricing</i> 14:16
Assets
<i>Quote templates</i>
Parts management (purchase orders)16:12
<i>Quote templates</i>
Parts management (purchase orders)
Paper process 18:23
<i>Tech On-site</i>
Accounting integrations
<i>Type of work</i>
<i>Deficiencies</i>
Access to information
Assets
<i>Tech On-site</i>
Forms24:11
Forms 25:33
<i>Deficiencies</i>
Access to information
Assets
<i>Tech On-site</i> 29:19
<i>Deficiencies</i>
<i>Tech On-site</i> 30:22
Dispatch 31:40
Implementation and ongoing support 33:32

<i>Tech On-site</i>
<i>Deficiencies</i>
<i>Quote templates</i>
Parts management (inventory)
ST app contracts and pricing
Customer engagement (quoting and invoicing) 42:48
Quoting
Customer engagement (quoting and invoicing) 46:40
<i>Quoting</i> 47:05
<i>Invoicing</i>
<i>Type of work</i>
<i>Pricing</i>
<i>Pricing</i>
Customer engagement
<i>Purchase decision</i> 53:22

Transcript

"This English transcript was generated using Gong's speechto-text technology"

CHRIS
o:oo You hear me? I?
JOSEPH
0:01 Can, how you doing this morning, Chris?
CHRIS
o:o3 How are you doing?
JOSEPH
0:04 Hi, I'm doing well.
CHRIS
o:o6 Hello?
JOSEPH
o:07 My name's Jay somewhere else also go by Joseph on the southeast territory manager over here at service trade. So, I'll be the one helping you take a look at this and be your main point of contact for answering questions, that sort of stuff.
CHRIS
0:21 Yeah. You're the one of skis, right?
JOSEPH
o:23 I do ski.
CHRIS
o:26 What do you ski?
JOSEPH
0:27 That picture is actually out in lake tahoe couple of years ago.

friends and family that go up there and we ski every year.
JOSEPH
0:42 Nice.
CHRIS
o:43 Yeah.
JOSEPH
_{0:44} Yeah, I got some great mountains up there. I've been to Sunday river in Maine but never much in New Hampshire.
CHRIS
_{0:50} Okay. Yeah. I gotta like santa Fe amounts on a pain.
JOSEPH
o:56 So, I went to a white face one time in New York, had a college friend that had a house right near there. And my favorite part about that one is you going up to the peak and signs that say this is where the top of sto is. And this is where the top of the other mountains are just to kind of rabbit in their face a little bit.
CHRIS
1:13 That's where?
JOSEPH
1:13 There are a couple of 100 feet higher and elevate.
CHRIS
1:16 Right, right. Yeah. I think I think any mountain is high enough for me. I don't even care if it's a hill?
JOSEPH
Yeah, it's more about the snow. I was skiing in Virginia this past winter and the guy was with that was in salt lake city the two weeks before that, and he said the skiing in Virginia was better just because they had fresh snow. So.

0:30 Okay, nice. Okay. Yeah, I try, I fall a lot. I go to New Hampshire and ski, I got

CHRIS

1:39 That is the data. And we had fresh no up in New Hampshire too, which is nice. Typically when I ski in Virginia, it's all for you. It's all ice, you know... but I haven't

been in Virginia, you know, skiing in a while, so.

CHRIS
1:57 We were at wintergreen. Yeah.
JOSEPH
2:02 They got like eight inches of snow that morning. It was great.
CHRIS
2:05 Okay. That is nice.
JOSEPH
2:08 See. Alright. So to give you a bit of an idea of how it normally.
CHRIS
2:12 On these meetings?
JOSEPH
2:14 Want to learn a little bit more about.
CHRIS
2:16 Your
JOSEPH
^{2:16} Current process the PDF. So you were telling Rachel about that way I can have a better idea of where to take you because we could spend, I could talk all day about service, trade the system.
ST app contracts and pricing
CHRIS
^{2:26} I really don't know what? No, I don't really know what you guys are about. I mean, I know, I mean, I'm old school, you know, I've been in the trade for a long time and.
CHRIS
^{2:42} I have to just have a basic basic spreadsheet where I list on my materials labor hours, you know, my profit margins, Mike, overhead margins and, you know, and I work off of that sheet and I've been doing that for 25 years.

1:56 Yeah, we were at.

JOSEPH

--- Recurring maintenance ---

CHRIS
2:59 Yeah. Yeah.
JOSEPH
3:01 So, are you keeping up with all of your?
CHRIS
3:04 Like.
JOSEPH
3:05 Or, I guess first off, are you doing a lot of preventative maintenance work?
CHRIS
3:08 Yes.
JOSEPH
3:09 Okay. So, are you keeping up with all the recurring scheduling stuff in that spreadsheet?
Paper process
CHRIS
3:15 No, I do not know that I have a separate office lady that takes care of all the preventive maintenance stop and she hasn't on a excel spreadsheet as well where she schedules everything and does all that.
JOSEPH
3:29 Gotcha. And so you just kinda of filter it down to what to do when and right? Or the, and then you write out a work order or those sent via PDF electronically?
Paper process ends
CHRIS
3:40 No, we have a check off spreadsheet that we get. We have Monday morning meetings every Monday and she gives the guys there sheets that they need and and then they turn them in on following Monday morning.
JOSEPH

 $_{\rm 3:54}$ Okay. So, work or is returned in once a week?

 $_{\rm 2:56}$ Yeah, it's amazing what you can accomplish in excel.

4:02 So, how long after you get the work order back or y'all are, how long does it take you to get that... that invoice out?

CHRIS

4:12 That's already in Quickbooks? So, I mean, that's already scheduled in the Quickbooks system, so that I'll check that goes out on that.

JOSEPH

4:18 Okay. So that's all just recurring invoicing, and then you take care of everything else on the side cool?

CHRIS

4:24 Correct.

JOSEPH

4:26 Okay. What about something like if you're doing a PM job and you find opportunity for additional repair, something that needs to be quoted out?

--- Paper process ---

JOSEPH

4:37 How are you communicating that back to the office to make sure that it does get quoted out and y'all can go try and win that work?

CHRIS

4:44 Yeah. Well, the guys, most of my customers are pretty. I don't really bid against too many other people. You know, I've had the same customers for a long time and, you know, my guys will give me a call or text me the information and let me know.

--- Deficiencies ---

CHRIS

4:57 Hey, I found a faulty compressor or faulty fan motor or, you know, system at no charge. And when I got there and I'll work it up and send the customer their estimate for approval.

JOSEPH

5:11 Okay. And have you ever including pictures or videos or anything like that on those estimates?

--- Deficiencies ends ---

CHRIS

5:16 Yeah. Yeah. Yeah. I know my guys well, so I'll phones or a wonderful thing. I mean, when I really into the text savvy yet, but level stuff does help. I guess. **JOSEPH** 5:26 Yeah, absolutely. Because I mean, if you're trying to sell me on something and I don't know much about mechanical equipment. **CHRIS** 5:32 Yeah, I'd... JOSEPH 5:33 Say a video of what's going on. What... what the problem is, will go a long way. **CHRIS** 5:36 Yeah, no, absolutely. Yeah. **JOSEPH** 5:40 So, what... what has you, were, what peaked your interest about... about software? **CHRIS** 5:45 Just, I guess getting into the 2021, you know, I mean, it is the future. I mean, my kids are with... with help me with it. So, you know, I don't know much about it. **JOSEPH** 5:59 Your kids going to be taken over the business Sunday? **CHRIS** 6:02 I'm not sure. I don't know. I don't have that answer. **JOSEPH** 6:06 Depends on if they want to or not. CHRIS 6:09 Yeah. I mean, they have other ideas and life that they want to do. So, I mean...

6:09 Yeah. I mean, they have other ideas and life that they want to do. So, I mean... I've already got children ground that are doing other things, you know? So... I don't know we'll say.

JOSEPH

6:24 Okay. Well, I guess you don't know what you need until you see it too. So I'll go ahead and get into it.

6:30 Okay.

JOSEPH

6:33 It's please as we're going through this. If you have questions, go ahead and stop me, it's a lot easier to answer them as we get going or as we're going instead of all at the end looking, Rachel scheduled out an hour for us today, do you have any sort of hard stops I need to be aware of.

--- *Pricing* ---

CHRIS

6:48 Do you mean?

JOSEPH

6:50 Like I can keep it right at an hour? If we need to go about like 45 minutes, I can make sure that I just need to kind of have?

CHRIS

 $_{6:57}$ Yeah, I would say let's try to do the 45 minute timeframe. I got all the things I gotta get done here.

--- Pricing ends ---

JOSEPH

7:05 That sounds like a plan. Well, I'll get rolling on this then. So service trade, we have about 700, a little over 700 customers across the y and Canada. We work with mechanic, commercial mechanical companies and fire for...

CHRIS

7:18 Companies.

JOSEPH

^{7:19} Because that workflow is pretty similar of doing a PM or an inspection, finding issues that need to be quoted out, getting those back in front of the customer to be approved and then go in and finishing out that work.

--- Customer engagement ---

JOSEPH

7:33 And our main goal as a company is to help take your service business and turn it into a customer service business. So we wanna take all the good information that your texts are already documenting out in the field and help you display that back to the customer so that you can show them all the value that you're bringing them. And in turn, that helps grow the business by revenue, but also by headcount. If that's something you're our customers are averaging about a 24 percent increase in service

revenue without adding any more technicians that's just by helping them quote out more work can be more efficient with the resources that you've already got. So we help you with customer service online. So you can get those in route notifications like the one you saw earlier. We can help you quote online super quickly. So your technician can document an issue. You can turn it into a quote in the office, have the pictures, the videos and all that attached to it.

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

JOSEPH

8:29 And then you can have an easy approval process for your customer. So they can just click on the approve button. Then it logs everything for you and you can turn it into a job. We also help people out with a service links. So this is a way you can share with your customer exactly what you did before you send them the Bill just so that there are less questions when the Bill does calm.

--- Customer engagement ---

JOSEPH

8:51 We also have a service portal looks like you're on a Wordpress website. So we could just embed this into your website so your customers can have their...

CHRIS

9:00 User.

JOSEPH

9:00 Name and password, they can log in. And if a property manager has 10 10 locations that he's looking after, he can see all the different jobs that he has coming up or going on today, look at the assets in those jobs have been done at certain locations. And then they can also go in and approve quotes and that sort of stuff through your website. And then lastly, we can help you invoice out here. If you want to, for more of your recurring invoice, you could... you could do that in service trade or you could do it in Quickbooks if you wanted to keep it there.

--- Customer engagement ends ---

JOSEPH

9:36 But for any sort of repair work like reactive calls, this is a great way to get those invoices out really quickly. And I also have a very detailed... a description of it here on any service details, but I'll get to that in a little bit once I... once I show you the actual invoice.

--- *Pricina* ---

JOSEPH

9:55 So something to keep in mind as we go through this kind of what that 24 percent increase in revenue would mean for you? All that can for some people, that means

hiring on more some people, it means a new boat for you different things. Where everybody... right?

--- Recurring maintenance ---

JOSEPH

10:14 So the way service trade is designed, we were built from the ground up for commercial service contractors. So we're able to help you keep up with your customer and your location separately. That way you can have a costco corporate headquarters with 50 costco locations underneath it if you need to. So I've got a couple of job setup for us for today. These are PM jobs. So I've got a quarterly and an you will PM, I've got an estimated price and duration on there that's more for scheduling purposes. So that whoever scheduling it out, a lot of our customers like to knock out the more expensive work at the beginning of the month.

--- Assets ---

JOSEPH

10:56 And it's tied to an asset. So we're able to help you keep up with what equipment is on site with model, serial number, built, size, quantity, filter, sizes, things like that. So that your technician can have all that information in the field. And then you can track the history of the equipment over time.

--- Recurring maintenance ---

JOSEPH

Then over here on the right, I've got my preferred technician. So I can designate, hey, if I want the same technician going out to this location every single time we do one of these PMS, I can put that in the system so that it does get scheduled out like that. Do you have any questions there?

--- Tech On-site ---

CHRIS

11:35 Nope, not yet. No.

JOSEPH

All right. I'm gonna hop out into the field, complete a job out here and then show you how that would come back to the office. So down here at the bottom, well, I'm on a tablet today. You can do this on a phone or a tablet, either one down here at the bottom. I've got my clock events. So o'clock, in that I was in route, I can send you the notification that I'm on the way straight out of here. And then when I get on site, I click on this clock out button, and then it'll ask if I am on site that will turn green at the bottom and it will take a GPS snapshot of wherever your technician is at the time. So if there are 20 Miles away from the costco, they say they're at it'll, flag it for you. So starting with these tiles, this is where all the information you're going to need is laid out in service trade assets is going to be the equipment that we're working on.

so I can look at just equipment that I have that I need to worry about for this appointment or I can go over here and look at all the equipment I have on site at this costco, and I can click into each one of these units individually. So if I wanna look at this rooftop one unit, I can see my model, my serial number, built sizes, quantities all. And then like warranty information all right here from the app. And this is what your technician would be seeing in the field. If I'm trying to diagnose an issue that's going on with this. I can look at the service history just for this one unit. That way, I'm not search sifting through old invoices. I'm trying to figure out what was done last year. And so I can see, I only got a couple of PM jobs. We had a service call back on March 30 first and you can click into each one of these and see what was done. Our, your guys looking at service history right now?

CHRIS

13:24 They would call me and I can like you said, I pull up their folder and I'd look, you know, a... past... past performance is and what we've done or... what repairs were made in the past?

JOSEPH

13:40 Or those calls pretty common?

CHRIS

13:44 You mean other problem should probably units out there. Is that what you're asking me?

JOSEPH

13:50 Getting a lot of those calls asking for service history.

CHRIS

13:53 Now, now that doesn't always there's always a few, that problem unit. Yes.

JOSEPH

14:01 And so that would be, this would be more useful for those specific problem units.

CHRIS

^{14:05} Yeah. So if a... if a customer notice is that we've been working on this unit, you know, or... or he spent too much money on this unit and maybe time for her to replace the thing, you know?

--- *Pricing* ---

JOSEPH

14:16 And that's another value add you could bring to your customers is if you, since you're going to be starting to track all the history and how much they're spending on each asset, you'd be able to go to them before they even realize it and say, hey, you spent 5,000 dollars on servicing this in the past year, a new ones, 8,000, you, it'll be a lot better for you to just go ahead and buy new...

--- Assets ---

CHRIS

14:39 Right, right.

JOSEPH

14:40 And you have the data to back it up inside service trade.

CHRIS

14:44 Yeah.

JOSEPH

^{14:47} So, apart from service history, we also have deficiencies, this is a documentation as to all the issues that we have found over time with this piece of equipment. So if there are trends that you see, you'd be able to see all the different problems I can find right here in this in one place. And then underneath attachments, you can have pictures videos, or maybe a PDF repair manual for this particular asset. That way, if you tag needs a picture of where it's at or the, that repair manual, it's all tied to the piece of equipment forum down the road.

JOSEPH

15:27 All right, to the left, we have job items right here.

--- Quote templates ---

JOSEPH

^{15:31} Do you have like a list of parts that it's in your Quickbooks or is that just something you all right in on a case by case basis?

CHRIS

^{15:39} A case by case basis? I mean, if I need a compressor, I mean, I'll get the model serial number, the unit, a crawl, the rep, I'll get a price on that could press around because, you know, prices fluctuate all the time now. So, and then I'll get the price that I'll work it up to my, you know, my spreadsheet... I'll put down the supplies that I'll need and what I think the labor hours are okay. That's it.

JOSEPH

16:08 So, if I'm out in the field and I need to add apart, I could do it straight from here.

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

JOSEPH

^{16:12} So I would just select the job item if it's in a... a list that you have that's great, you can just select it from right here or you can always click on other and do this kind of a one off.

CHRIS

16:22 And where does this information come from? It's already in your system or?

--- Quote templates ---

JOSEPH

16:26 No, this is something that you would set. We can set up for you if you want a list of just standard parts that you have, that you use a lot, you can put them in here so your technicians can choose from them. But then if that you want to add something on a case by case basis, you can always just click on.

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

CHRIS

16:43 And then hit the plus side exactly.

JOSEPH

16:47 So, I'm just gonna choose a widget here and then it, since cost is always changing, a lot of our customers are leaving that blank and let in the office take care of that. But as the technician, I can go ahead and add this part and then document where it's coming from.

CHRIS

17:03 You know, that?

JOSEPH

^{17:04} It came off of my truck. I can select. Hey, this came from drop too. But if I'm run into the parts house to pick it up myself, I can select my parts vendor here. And then it'll ask which vendor it's coming from. We can put your list of vendors. If it's a BC or Ferguson or whatever the cases. We can have those in there. And then your team can enter a po number for that part are y'all issuing POS from the office right now.

CHRIS

17:29 Yes.

JOSEPH

^{17:30} Okay. So you'd still probably issue it from there, but then the tech could just type it in so that you have visibility across the platform as to what that po is for that

part. And then you can put a status on it. So if the technician picked it out themselves, you go ahead and market received if the tech needs the office to order it and you can make say, not yet ordered. And then you can be running a report once a day in the office to say, hey, show me all the parts from today. I need to order.

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

JOSEPH

^{18:01} And I can just add that to their, and that's it, you have any questions on adding parts?

CHRIS

18:09 For example.

JOSEPH

18:12 Out, would that be helpful? Or how would that change the way that your guys are doing it now?

CHRIS

18:18 It would definitely be more efficient doing it the way you do it.

--- Paper process ---

CHRIS

^{18:23} I liked that they log into be, you know, I mean, it's all that's what my guys got a stack of, you know, customer service reports that they have to fill out and it would be a whole lot easier to... type it in with the technology that you guys have now than it is to write it in there. I'm sure... I'm sure.

JOSEPH

^{18:45} What, what kinds of information or they documenting on a customer service report? I've never heard that terminology before.

CHRIS

18:52 It's been around a long time a long before you bet around. It's just a CSR ticket and say, you know, you're... you're right? The customer name, you're... you're right? What... what... what you performed, what material is you bought?

--- Tech On-site ---

CHRIS

19:09 The, do you use pre on, if you reclaim that I free on? Added? If you... you sign at the customer signs it, it's just the, it's the same thing that you got here.

JOSEPH

--- Tech On-site ends ---**CHRIS** 19:22 That's yup. That's all it is. **JOSEPH** 19:24 Okay. So that's exactly what we have here. You're at a digital customer service report? **CHRIS** 19:29 Yeah. Yep. That's what you got. **JOSEPH** 19:32 Well, we... **CHRIS** 19:33 Have access to your information. I mean, is this something that, you know, I mean, it looks like a lot of, you know... it's a lot of information that you're gonna put in here that somebody could steal your information? --- Accounting integrations ---**CHRIS** 19:49 That's one thing I get concerned about. Yeah. **JOSEPH** 19:51 That's a, that's a concern that a lot of our customers have, but we've never had an issue with it because we run off of something on Amazon web services. So, we're running on the same cloud system that like bank of America is running on. So we got some really big players that beef up the security there. **CHRIS** 20:10 Now, what? **JOSEPH** 20:11 Happens? **CHRIS** 20:11 System crashed body of retain all that information.

JOSEPH

19:19 Gotcha. So it's like a work order. It's just a different word for.

^{20:15} It's stored in multiple places. So it's stored in about, I think three or four locations at a time, so you can't lose it and it's one of the benefits of doing a cloud based system over a server based system.

--- Accounting integrations ends ---

CHRIS

You gotta keep it by an extra cloud dot J. If you, it's like my phone, I keep telling me I'm on a model data model. I'm gonna lose my photos. I gotta buy more storage. I'm second, buy more storage. It seems like every month I'm buying more storage.

JOSEPH

20:44 Well, I promise a service trade that's not gonna happen.

CHRIS

^{20:47} You don't have to buy more customers, I get, don't you have to buy more storage.

JOSEPH

^{20:51} Not with more customers, we charge based on technicians. So the more business you get, the more technicians, you get that's when your service trade Bill go up.

--- Type of work ---

CHRIS

^{21:01} Just because I got 18 technicians, doesn't mean they're all service technicians though. I mean right now, my service technicians have something like this.

JOSEPH

21:11 Yeah. So how many service technicians do you have?

CHRIS

Now, at all them guy, I mean, I got sheet metal guys, I have electricians, I have... you know, a different range a guy. So just for the HB AC, service side, I mean, I don't know maybe six, you know? So I would only probably need six of these. You know what I mean? For guys, I was just running around just doing service all like, you know, right? So because we do a lot of, you know, a lot of new installs, I got my own separate install guys. I got guys doing the sheet metal, you know, for that side and.

JOSEPH

Yeah, some people are running just with their service techs, others are running with service and install because you'll be able to help document hours and things like that for your server for your install guys.

and put all the asset information into the system and setup that recurring PM, so that your service guys just can hit the ground running when it's time for.
CHRIS
22:20 Right, right.
JOSEPH
22:24 Right up here on the left.
Deficiencies
JOSEPH
We're able to help you have with attachments. So if you have, you wanna take pictures on site, you can snap a couple of pictures and they'll store in the cloud rather than taking up space on your phone. You can do videos, audio, memos, things like that in there. So.
Access to information
CHRIS
22:45 What is that? Where does each, Greg, it gets its own tablet?
JOSEPH
22:50 Of our customers are just using phones.
CHRIS
^{22:53} They were using their own, our own work phones.
JOSEPH
22:57 Yes, sir.
CHRIS
22:58 Okay.
JOSEPH
22:59 Do you already have phones for everybody?
CHRIS

^{23:01} Wow, no, I actually reimburse them to use their own... phones. I noticed that... just a waste of money and be supplying them phones in them, having their own phones are just too many phones.

23:16 That's right? All you really need is one phone.	And if they have that, rig	ght? And
there are a lot more careful with.		

CHRIS

23:22 Exactly. So we just give them and allow it. So what we'll give them each month for their phone.

--- Assets ---

JOSEPH

^{23:27} Yep. So it'll be the same sort of thing. They would just download this app on their phone and they'd be able to access all their work orders.

CHRIS

23:35 Okay.

JOSEPH

^{23:37} I'm underneath comments here, we'd be able to put a job specific comments or location specific comments. So if you've got a gate code or an alarm code for a certain location, you can put that in here tied to the location.

--- Tech On-site ---

JOSEPH

^{23:52} And then it'll be available every time you go out there... four PM checklist or y'all, filling out checklist out in the field. What?

CHRIS

24:02 Do you mean?

JOSEPH

^{24:04} Like for your preventative maintenance? Where do you have a checklist that you're attack is going through of? Hey, I check this out, check this. Everything looks good.

--- Forms ---

CHRIS

24:11 Correct. Yes. Okay.

JOSEPH

24:14 And are those all on paper right now?

CHRIS

24:16 They're all on paper? Yes.

JOSEPH

^{24:18} We could take those, whatever checklist you're using. Now, we can put them into service trade as a billable PDF. I can click generate paperwork and it'll we have these smart rules that are go ahead and take information from service trade, look, names, work order number, even the model and serial number of the system that you're working on, and I can go ahead and apply all of this to a specific field on your paperwork. So your technician doesn't have to waste time fill in that in and they don't have the opportunity to do it wrong. And then they can just go through and either check boxes. They can type things in underneath comments. You can make dropdown boxes, whatever you need right here to make it look like the paperwork you're using.

--- Forms ends ---

CHRIS

25:00 Okay.

JOSEPH

^{25:03} Then when you're done with that, you just make sure you share it back to service trade so that it is available.

CHRIS

^{25:08} What are the final? Like what I see right now and I like something that you have for me. Can I use something else?

JOSEPH

25:13 Yeah, he can use whatever you want.

CHRIS

^{25:14} Okay. I mean, I liked that little check off thing that you guys get right though. That's pretty good.

JOSEPH

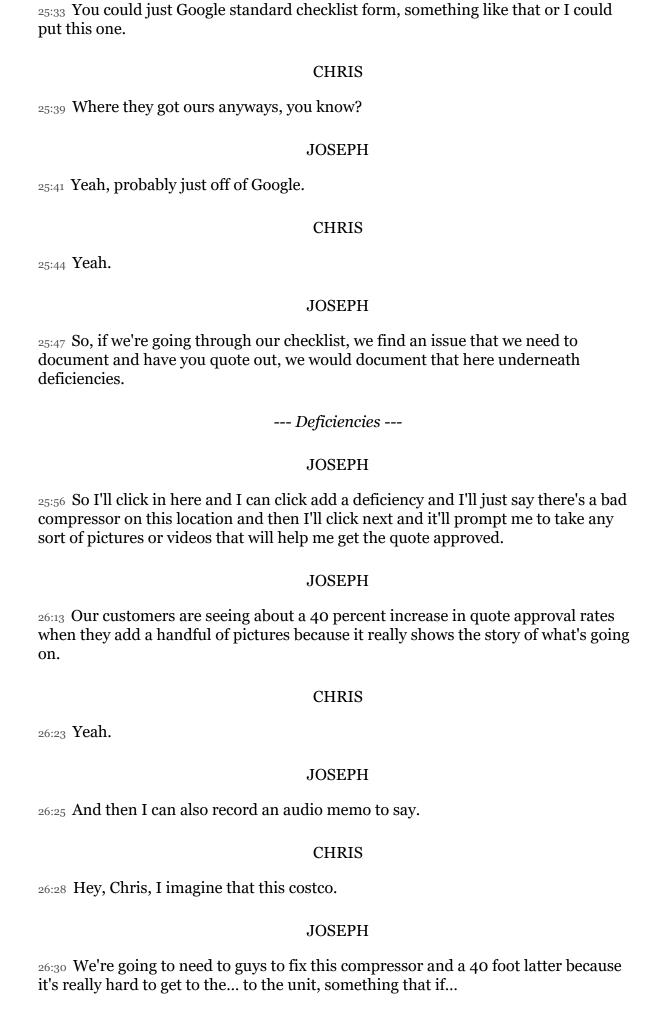
^{25:22} Yeah. So, I mean, if you wanted to, you could... have somebody in your office kind of work up a new form and then we could make that into available.

CHRIS

25:32 Yeah, or...

--- Forms ---

JOSEPH



CHRIS

^{26:40} If you can, if I can. So there's an audio on there. So if I can hear the compressor point getting client, can I can send that to the customer as well?

JOSEPH

^{26:50} Absolutely... of that compressor clanking around, it will automatically be attached to the job. Here are the work order and service trade. So you don't have to worry about filing it away somewhere and you don't have to worry about storage because it's all stored up in the cloud and you'll never run out of storage with us.

CHRIS

27:09 Okay. Not this year anyways...

JOSEPH

27:14 Not ever. I promise you that.

CHRIS

27:16 About ever. I love, I have fully that word. Okay... okay?

JOSEPH

Well, then walmart, the severity of the issue. So I'll make this one just in operable. So we know to quoted out real quick. And then I'll tied back to the particular unit that we're working on to help build out that good Rich service history per piece of equipment. So that way when it is time to recommend a replacement, we have everything documented as to how much they're spending on this. And then I have it as an HP AC service line, I'll market as new. And then my technician can put a proposed solution in there of replace. So when they click save, this will automatically shoot out to the cloud and it'll send you an email notification saying, hey, this issue is found at this location. And then a couple of buttons, you can quoted out. And so I'll show you that process. When we get back to the office, you may, I notice there's a little red triangle right here.

--- Access to information ---

JOSEPH

^{28:14} That just means I didn't have good service. So if you are off line down in the basement or something, you can continue to document things. And then whenever you get back to you service, it'll shoot up to the cloud. So you have full off-line capabilities once you're in the service trade app.

--- Assets ---

CHRIS

^{28:32} But if you can't bring your phone and a certain situation, I mean, we do a lot of government work and you're not even allowed to bring it from the building.

28:41 Yeah. **CHRIS** 28:43 How did they perform that? JOSEPH 28:46 So, on those, you could still print off your work orders and then just put them back like scan them back in or take a picture of them and put them underneath attachments with everything that's filled out. --- Assets ends ---**JOSEPH** 28:59 But if, I mean, if they can't take a phone, and then... not much... not much we can do about that when I get. CHRIS 29:05 Wow, yeah, it's only certain buildings but, you know? JOSEPH 29:11 Yeah, we run across that the... the government's really paranoid about their secrets getting out there. **CHRIS** 29:16 Exactly. --- Tech On-site ---**JOSEPH** 29:19 You did say that you're... you're capturing signatures and then have a job, right? CHRIS 29:23 Correct. Okay.

JOSEPH

^{29:26} Now that we're we've done our paperwork, we've documented that deficiency. We're about ready to roll to the next one.

CHRIS

^{29:32} And that's when they check out, you know, at least you gotta go, you know, they'll go through the customer, let them know they completed that task. And if there was an issue, they'll tell... tell the customer, there was an issue. And if there's no issues on, they just, you know, go ahead and sign it and that's it, you know.

^{29:48} It's great. That's exactly what this work acknowledgement right here is for. So I can select my contact, see, I can select you right there and I'll click review and this is where the cost or the tech would turn their phone around to the customer and say, hey, we took care of these two PM for you today.

--- Deficiencies ---

JOSEPH

^{30:04} You can hide the parts and labor if you don't want them to see that, but that can be on there if they had a PM checklist that they did, that would land right here along with any pictures that they took. And then they have the deficiency because we wanna make sure like you said that the customer as well aware, hey, you're going to be getting a quote for this bad compressor.

--- Tech On-site ---

JOSEPH

^{30:22} If you haven't gotten it already... so I, they can check that I knowledge of work has been completed, confirm and sign and it'll drop a copy of that working knowledge meant into your customers inbox.

CHRIS

30:37 Okay.

JOSEPH

30:38 You need to send it to somebody else. You can always just choose another contact right there.

CHRIS

30:42 How's the, how's everything going with the COVID stuff? Now, people don't even wanna touch each of those phones and stuff or tablets or... how's that panel?

JOSEPH

_{30:53} Right. So... you can still send those working knowledge mints without capturing a signature. So you're still communicating to the customer exactly what's going on.

CHRIS

31:04 Okay.

JOSEPH

31:05 But if they don't want.

CHRIS

31:07 That they may not want to touch somebody has found, you know?

JOSEPH

^{31:10} Yeah, I get that. So we do, they don't have to capture that signature, but if they don't want to touch the phone or the paper, whatever it is, it's going to be hard to get a signature.

CHRIS

31:20 Yeah.

JOSEPH

31:21 But at least you're communicating it to them of what happened?

CHRIS

31:24 Right.

JOSEPH

31:26 So, now that I got my signature, I can go ahead and clock out. I'll mark that the, I completed the two PM is I came to take care of and then I'll say, yes, I am done with this visit.

--- Dispatch ---

JOSEPH

31:40 So now I can go onto my next job. I can look at what I have on this goodness do yet? You're giving your text like a week's worth of work orders at a time, right?

CHRIS

31:49 Correct.

JOSEPH

31:51 So, if you wanted to continue to do that, you could just assign them a bunch of unscheduled work orders so they could go here and they could sort by, hey, what's do soon, what's been marked priority or what's close by, if you wanted to still have that flexibility to schedule themselves out. And then they can also look at a map and see what are all the jobs right around me. So, if I'm headed to Durham and I've got a couple of hours between now and my next call, I committed to up here, I might as well just take a look at this job and stop by that starbucks and do the job that's there.

--- Dispatch ends ---

CHRIS

32:27 Okay.

32:31 How do you think your text would feel about looking at jobs this way?
CHRIS
^{32:35} I'd have to communicate with them and talk to him about it. I mean, that's what I'm gonna do after we're done, see what their thoughts are. Make sure they're on board with something like this. So I've got some, all the friends that on some businesses, I'm gonna reach out to them, see what they use, BuildOps.
JOSEPH
32:58 Local businesses.
CHRIS
32:59 Yeah, yeah.
JOSEPH
$_{\rm 33:02}$ Yeah. We've been working with a couple of mechanical contractors around there.
CHRIS
33:05 Who do you, who do you, maybe I know one of them?
JOSEPH
33:09 You, you competition with GRC or seven?
CHRIS
33:12 I don't like J are say bad?
JOSEPH
33:16 Blood there?
CHRIS
33:17 Bad blood there?
JOSEPH
33:19 No.
CHRIS
33:20 No, my competitor.

JOSEPH

33:22 I hope I'm not shoot myself in the foot by saying they're about to start on with service trade. **CHRIS** 33:27 Not at all now. So they haven't started, they haven't done it yet. --- Implementation and ongoing support ---**JOSEPH** 33:32 That'll be live by the end of the summer. **CHRIS** 33:34 Okay. Okay. And why did, why... why would it, why does it take to the end of the summer to get it up and running? **JOSEPH** 33:41 Well, they're they've got some integrations that they're setting up? They've got... takes a while to get all the customers locations, all of the parts and everything into the system. **CHRIS** 33:56 So, instead of like college you next week, it may take a few months to get started, you science? **JOSEPH** 34:05 Exactly. Yes, sir. **CHRIS** 34:06 Okay. Okay.

JOSEPH

34:08 So, our customers that sign on today, I believe they're getting started on June first with onboarding, and then from there, it's about eight weeks to go live.

--- Implementation and ongoing support ends ---

CHRIS

34:19 Okay. So, who... who... who else do we got on my side of the water air that Amanda?

JOSEPH

34:27 Let's see, are you familiar with the seven group they're up in DC?

CHRIS

 $_{34:34}\,$ My other screen here just went down on me, see if I can pull.

CHRIS

34:38 It back up.

34:31 No.

CHRIS

34:43 Yeah, master's...

JOSEPH

34:47 Not familiar with masters.

CHRIS

34:49 Okay... professional.

JOSEPH

34:59 I don't know professional.

CHRIS

35:01 Man, we're all the same.

JOSEPH

35:04 Okay. I'll have to look at.

CHRIS

35:06 Hello? Like a J are say, hey, our C is only been around a little, the only been around a few years, but they... they came from, I think they're from colonial web or some mobile company that branched off years ago. So they're they've been around, they know a lot of people.

JOSEPH

35:27 Okay. I'm sure you're also familiar with like Virginia sprinkler, they use ours as well. They're on the fire protection side, but...

CHRIS

35:35 Yeah, window, Virginia sprinkler.

JOSEPH

CHRIS
35:39 Small world. They're small world everywhere.
JOSEPH
35:42 Absolutely.
CHRIS
35:46 Do all over the country, is that, would you do?
JOSEPH
35:48 All over the y and Canada, yes, sir.
CHRIS
35:51 Okay. Okay.
JOSEPH
35:54 So, now that we're back in the office, I can.
CHRIS
35:57 In Boston?
JOSEPH
35:59 Yeah, we have a big customer up there in W BMW mechanical. I think it is
CHRIS
36:07 The MW.
JOSEPH
36:08 Be, and W
CHRIS
36:10 Be, and W
JOSEPH
36:12 There's, the guys out of Boston?
CHRIS

 $_{\rm 36:14}\,$ Okay. I've got a lot of friends that too. So I can ask.

 $_{\rm 35:37}$ They're pretty big customer of ours in Virginia.

JOSEPH 36:20 Okay. No, BMW is out of Atlanta. **CHRIS** 36:25 Hello? **JOSEPH** 36:26 Austin... reminds failing me this morning... but I, yeah, I'll get you the name of that. They went out of Boston. I know we've got one of the biggest mechanical contractors around out there. So, now that we're back and office view, I can see that these two service? --- Tech On-site ---**CHRIS** 36:48 Are... **JOSEPH** 36:48 Completed from the field? **CHRIS** 36:53 I got someone that wants to look in that walked in, hey, pull out... all the service trade. **CHRIS** 37:05 You're out, she's out. **JOSEPH** 37:09 Already, what did I say? CHRIS 37:11 Not just do much? Alright, go ahead.

JOSEPH

37:15 Now that those have been completed in the field, they're showing green and completed here in the office. I can see the parts that I've added on. So that widget I added in the field, I can see where it came from and my po for it. And then I've also got the other parts that were on there as well. I can see my clock events. So I can make sure that my technician was actually at the location and they had drove for 21 minutes and we're on site for 20 minutes.

CHRIS

37:41 So I can get rid of my GPS system.

37:43 If you want to, you could, the only thing service trade will only be doing GPS snapshots when o'clock event happens. So if a truck gets stolen over the weekend, we can't help you with that because we're tied to the.

--- Deficiencies ---

JOSEPH

38:05 That, that issue that we documented normally, that will come through your email and that's where you would access it. You can also run reports for any deficiencies found this week or today or whatever the cases. And then down here at the bottom down here, you can see we do have the deficiencies underneath the work order or the job it was found on. So I'll show you how to quote out that real quick. And then we'll be about 45 minutes at that point.

CHRIS

38:31 All right.

JOSEPH

38:33 I've got my, when you click on the link in your email, it'll show you the location the problem was found, that the unit it was found on, I've got my description, my solution and who found it. And then I've got my media down here. So I've got my picture and my audio memo. If there are similar issues that have been found in the past, they will show up underneath related deficiencies. So if I've had a couple of problems on this one piece of equipment and it might be something I need to recommend a replacement on it will give you a quick visibility into that right there.

--- Deficiencies ends ---

CHRIS

39:06 I'd say the system phrases, how quick do you guys resolve your issues?

JOSEPH

^{39:12} Our system has never gone down, we have a buck bugs here and there, and we have a great response time. I believe it's an average of six minute response time from our support team.

CHRIS

39:27 Okay. Sorry, how many people are on your team?

JOSEPH

39:32 We have about 80 employees right now.

CHRIS

39:35 And they take care. Everybody all over the country.

$_{\rm 39:38}$ Correct. Yes, sir. And we're all located here out of rally. So we're not outsourcing this stuff over to.
CHRIS
39:44 So, you're not that far away then?
JOSEPH
39:46 No, sir. We're just down the road.
CHRIS
39:49 My brother lives in Durham. So.
JOSEPH
$_{39:51}$ Okay. Yeah. That's where our offices right there, off of 40 and the RTP area.
CHRIS
39:56 We just bought a house and maybe, you know, where it is. I never heard of it. Wagon lot, frog month roadblock.
JOSEPH
$_{ m 40:08}$ Hi, Bill. Your, I couldn't tell you exactly where it is as usually during the rally side.
CHRIS
40:14 Yeah, it's north of dorm.
JOSEPH
40:16 Okay. That's the right side of down to be on.
CHRIS
40:20 He wasn't F1.
JOSEPH
40:22 Yeah that's closer to greensborough that's where I grew up.
CHRIS
40:28 Borrow? Okay.
JOSEPH

^{40:33} Right. So we've got our deficiency. Let's go ahead and create a quote from it and I'll send it over to you so you can see what that looks like or would look like for your customer.

 Quote	tempi	lates	

JOSEPH

40:44 So that when I click create quote, it'll take all the pictures, all the asset information that we've documented in the field and it'll go ahead and apply that to equip.

JOSEPH

40:57 That way we're not doing any extra data entry here. So I've got my quote. I've got just all the basics right here, but I can apply a quote template to fill out my description and my parts and whatnot. So this is a compressor replacement. I can have a template for that, whatever sort of description you want in here. We can put it in there and then whatever parts and labor it's gonna take to do that repair. You can just click on that and it'll automatically put all those in here for.

CHRIS

41:22 You wow.

JOSEPH

41:25 Then I can control how I want the pricing display to the customer whether it's PNM or grand total.

CHRIS

41:31 But a lot of the prices fluctuate. So, how do you have those, how do you have those price prices in there?

JOSEPH

41:39 For the cost, if you are getting your.

--- Parts management (inventory) ---

CHRIS

41:42 From...

JOSEPH

41:44 You can get it from your suppliers in bulk if you want. And then just upload it into service trade and update it whenever they update there's or you could have all your parts in here with no cost, and then I could go through and change that to 20.

JOSEPH
42:00 And then with the markup rules applied, it'll market up the right amount if I don't have my standard cost in here.
CHRIS
42:07 Can I change the markup on it or is it is it already? And now?
JOSEPH
Yeah, you can make the markups whatever you want.
CHRIS
42:14 Where's the markup on that?
JOSEPH
42:17 I don't know the exact one is on this, but you can make different rules for different customers if you want to or you can have standard markup rules across everybody.
CHRIS
42:27 Okay.
JOSEPH
42:28 So, if I have different pricing contracts, are different customers or locations, I can, I'll have them automatically tied to the location. So it will default to the right one. But if you ever need to change it around, I can click on that and it'll adjust my markup rules over there. So if I go back to this one, it will change based on the markup rules I've set and this is.
Customer engagement (quoting and invoicing)
CHRIS
42:48 I'm sorry?
JOSEPH
42:52 And then I can always keep an eye on my gross margin down here at the bottom before I send it out.

CHRIS

42:57 Okay.

JOSEPH

 $_{43:01}$ What are your thoughts on that process of putting a quote together?

43:04 Very simple.

JOSEPH

43:06 As them today and sample people just won't use it. Yeah. Alright. So I'm going to send this over to you. Do you have access to your email right now?

CHRIS

43:16 Yep.

JOSEPH

43:17 To pull it up and go through the approval process, I'm interested to hear kind of how you think the... the layout would look for your customers.

JOSEPH

43:31 I can pull up a preview of it here as well?

CHRIS

43:42 We haven't gotten to that point. Got it. Yeah.

JOSEPH

43:47 Should come in and just a second... but this is what it would look like on a computer. You'd have your logo here in the top left, and then approve or request changes on the top, right? We didn't put a reject button on there because if they have a problem with it, we want them to request changes and tell you why and engage with you. And we've got the description of the work. We've got our picture and our audience demo down here to really show the customer what's going on parts and labor, and then your terms and conditions down here at the bottom.

JOSEPH

44:28 As that email showed up yet?

CHRIS

44:30 No, I don't know why and ask them... what time are we? At 10 40? I got, no, I was 10 32 center work acknowledgement?

JOSEPH

44:43 Shoot, maybe it landed in a spam folders, something.

CHRIS

44:51 Maybe or maybe this was it that you sent me? I don't know. Let me email I got from you was at 10 30 to, what time did you send it?

45:00 This would have been just now.

JOSEPH

45:09 That's all right. I can just show you how the approval process works. You'd go in, you'd click approve, you would check terms and conditions and then just click approve quote.

CHRIS

45:21 This would be from the customer.

JOSEPH

^{45:23} Correct. And I can approve it from this preview because it is just a preview. If you, and then on your computer clicked approve quote, I could see a full history of this. So if you go in and open the quote, they'll be another line right here saying Chris opened the quote from this IP address.

--- Quoting ---

JOSEPH

^{45:42} And then it'll have another one that says, Chris approve the quote at this day and time from this IP address. That way you can keep up with a full history of what's been approved, what hasn't what's been opened and what hasn't things like that.

CHRIS

45:55 **So...**

JOSEPH

46:01 So, right now, when you're sending out a bunch of quotes, how are you keeping up with what has been approved to?

CHRIS

46:09 To my customer, they'll send it back, say there was approved or declined and all accepted my Quickbooks... you know? Okay, I just... I just got it and say... 10 42.

JOSEPH

46:29 Took a couple of minutes to go through. I guess.

CHRIS

46:37 You want me to click on view? Want to respond to quote?

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

JOSEPH

46:40 Yes, sir. And then if you click approve, that would be great. And then I'll show you how that looks coming back to me.

JOSEPH

46:52 So, the quote you're sending out or they PDF attachments to... to an email?

CHRIS

47:01 When I send the quotes out too, yeah, it's on a PDF, yes.

--- *Quoting* ---

JOSEPH

47:05 Okay. And then you get approval and you gotta go into Quickbooks, find that quote and then click the button to say, hey, this was good.

CHRIS

47:12 Correct. That was approved at a certain date and who approved it. Yeah.

JOSEPH

^{47:20} So it sounds like we would just take some steps out of that process because it'll be easier for your customers to approve quotes by just clicking the button rather than printing it out, signing it, scanning it and sending it back. And it's also more binding than a normal then just replying to an email because we do keep up with the seat or the... the IP address that it was approved from, when it was viewed when it was approved, things like that.

CHRIS

47:48 I'm also, I'm sign, you know, sign it and send it back to me.

JOSEPH

47:52 Okay. So just reduce the amount of steps for your customer them.

CHRIS

47:56 Yeah.

JOSEPH

^{47:57} And once this is approved, I can either create a new job from this quote or I can add it to an existing job if I'm going to be out there next week for something anyway, might as well along this all in together.

CHRIS

48:09 Right. Okay. I sent it back to you. Yeah.

JOSEPH

48:13 I see.

CHRIS

48:15 Yup. Alright.

JOSEPH

48:17 And then this is our quote reporting page, so I can filter down and double check, make sure things aren't slipping through the cracks here. I can look at what's been submitted, what's been approved, what's still in draft stage. Now, I can do that by location or date or whatever criteria you want to. Since I'm tracking views. I can also look at, hey, show me all the quotes that have been sent to the customer and viewed by the customer but not yet approved. Maybe they got distracted with a phone call or something and didn't get back to that email because it was already open. So I can just bulk, select those and reason then to the customer just to make sure they're at the top of their inbox. And hey, that was what 30 seconds, where are they clicking? That gives me a few more jobs approved. It seems like that's where at the time?

--- Invoicing ---

CHRIS

49:04 Okay.

JOSEPH

49:07 You have any questions on that?

CHRIS

49:08 Nope. Nope. Sounds like you guys got a nice little system now.

JOSEPH

^{49:12} The idea. So then the rest of it, I won't do too much with the Quickbooks side of things. Pretty much we would be able too complete the job. I'll send you the service links so you can see that this is a way to show your customer what you did that day. And then we would complete job and create an invoice. You can invoice out of service trade if you need to, or you can push into Quickbooks and invoice out of there. And if you're doing that recurring invoicing already out of Quickbooks, I'd recommend keeping it there... and I can send you a video that goes through that Quickbooks integration because unfortunately, they didn't want to give me a... a Quickbooks account to play around with.

--- Invoicing ends ---

JOSEPH

49:55 So, now that you've kind of seen the basics, it looks like we're running up on our 45 minutes. How do you see this being useful for... for AMC?

50:04 Yeah. I mean, I definitely think it'll be useful. I guess the bottom line is what it's gonna cost me if it's worth it and what my guys like, you know? JOSEPH

50:13 Yeah. So what would you, how many technicians would you think you would want to run on a system? Like?

CHRIS

50:18 Honestly, I mean, I probably just, I mean, I don't know amazing. I would just start. I don't know, I wouldn't be, I was, Jay, are they doing it? We told me how they're doing it?

--- Type of work ---

JOSEPH

50:29 They've got all their guys are not there construction side, but they've got all of their service going on it.

CHRIS

50:35 My service guys, I got now about.

JOSEPH

50:39 30.

CHRIS

50:40 And she's...

JOSEPH

50:43 That's what our platform is designed to do is to help you grow now though there's...

CHRIS

50:48 Yeah. I mean, honestly, I'm not about to grow.

--- *Pricing* ---

CHRIS

50:50 I'm just trying to be more efficient. You know... I would just start off, you know, maybe six to eight, you know, six to eight tablets I guess or.

JOSEPH

51:02 Okay. So let's see. I'll price you out for eight. We do our pricing based on tech count. So we only charge you based on technicians. You're gonna have unlimited admin users.

51:20 And then, so your first year with some forms, all the training that you would need, you'd be looking at about 15 five, and then about 11 five every year after that to keep up eight technician licenses. And that would cover your training, your tack licenses, your project manager, that will help you get everything set up.

--- Pricing ends ---

JOSEPH

51:40 And we could also get that customer portal, which we didn't have the chance to go over but that customer portal setup for you so your test or your customers can log in and see all of their job info and history and things like that.

CHRIS

51:54 So that's roughly 2000 dollars a tech.

--- *Pricing* ---

JOSEPH

51:58 Once the setup is all done, it breaks down 219 dollars per tack per month. But we Bill annually.

CHRIS

52:05 119 dollars a month per tech. Okay? And then if you want to keep adding tax, how difficult is that?

JOSEPH

52:18 We don't ever restrict you from that. You can add as many as you want. And then just like next time we talk, we usually have trying to have a conversation at least once a quarter. Once you get up and rolling that'll be with your account manager. They'll be able to see, you know, it looks like you added to more technicians, we can pro rate those licenses through the end of your term.

CHRIS

52:37 I say.

JOSEPH

52:44 So, is this something that seems at least within the realm of possibilities as far as budget goes?

CHRIS

52:49 Yeah. Yeah. I'm in the I'm in the cost. I gotta go to the customer, of course.

52:54 Absolutely. Especially with that service portal... you could say, hey, extra 500 dollars a year. --- Customer engagement ---**JOSEPH** 53:01 You can have access to all of your information online. We don't charge extra for that, but you can charge them for that, and that will offset service trade from the start. And on top of that with a, an average of 24 percent increase in service revenue, I bet you'd see a little bit more than that... that's going to pay for service trade many times over. --- Purchase decision ---**CHRIS** 53:22 Yeah. Yeah. JOSEPH 53:28 It sounds like you want to talk to your tax about this? **CHRIS** 53:32 Hello? JOSEPH 53:33 Get involved in the decision making side of thing. **CHRIS** 53:36 What's that? **JOSEPH** 53:37 Hello, would you really need to get involved in making this decision? **CHRIS**

53:42 It really just comes from my gut feeling and, you know, what I think is best for, you know, this company really.

--- Purchase decision ends ---

CHRIS

53:48 I mean... you know, how I talked to some of my customers as well and see what their thought process, see if it's something that needs to be happy with us?

53:57 Move forward.

CHRIS

53:58 With, you know, I mean, because they're the ones that are going to see the changes as well, not just... not just may, but it definitely seems like it'll be a lot less paper trails, you know, then I will need. Yeah.

JOSEPH

54:15 So, I can make some videos that and screenshots that you can share with your tags in your customers to give them a better idea as to what they'd be seeing.

CHRIS

54:23 Okay. I...

JOSEPH

54:24 Can make like a little video walking through the customer portal that you could share with them.

CHRIS

54:28 Okay.

JOSEPH

54:30 Would it make sense for us to put some time on the calendar for next week to reconnect and see what they're what they think?

CHRIS

54:37 They'll have to be the week after. I'm going to be on vacation now?

JOSEPH

54:42 Lucky you.

CHRIS

54:43 Yep. Go ahead and the key west?

JOSEPH

54:45 Nice. I was down there about a month ago.

CHRIS

54:48 Yeah. Okay... okay. I've never been there.

JOSEPH

54:53 A lot of fun. I flew into Miami and then drove the highway down.

54:57 That's what we're gonna do. **JOSEPH** 54:59 It was beautiful. CHRIS 55:00 What was it? **JOSEPH** 55:01 Yeah. We rented a mustang convertible. **CHRIS** 55:03 Man, you went all out. **JOSEPH** 55:05 Absolutely. I took my girlfriend down there for her birthday, so I had to go all out. CHRIS 55:09 That must have been the J RC signing. You got? No? **JOSEPH** 55:16 Hopefully that... that may be a trip later on. **CHRIS** 55:19 Funny. **JOSEPH** 55:20 So, you'll be back the week of the 20? **CHRIS** 55:23 Six? **JOSEPH** 55:26 You want to throw some time on maybe that Tuesday or Wednesday? I'm sure. Monday, I'll be slammed for.

CHRIS

55:31 Yeah, terrible. Can we do Wednesday the 20 eighth?

CHRIS

55:35 Yeah. You want to shoot for 10 am?

CHRIS

55:37 Yeah. Let me... let me add that to my... calendar. Are you guys send me a calendar invite? Yeah.

JOSEPH

55:47 Sir. I'll send you another one of these calendar invites with the Zoom meeting link and I'll also send you some resources as far as like videos, screenshots to share around. I can send you a more formal quote for eight technicians if you want me to do that.

CHRIS

56:02 Be great. Yeah, if you could do all that, be great.

JOSEPH

56:05 Well, that sounds like a plan.

CHRIS

56:07 All right. Well, I appreciate that. And I guess it's time for me to go back to work.

JOSEPH

56:12 That's right. Don't get to somebody next week.

CHRIS

56:14 I'm gonna try not, so... alright. Take care, Chris.

The End