ServiceTrade Demo with Cary Services Inc

Matt Hetrick with Cary Services Inc
Recorded on 1/26/24 via Zoom, 1 hour 45 min.

Participants

SERVICETRADE

Matt Hetrick
Field Manager

Amanda Vaughan
SDR

OTHER

B.Bardin

J.T. Cary

Topics

Transcript

B.BARDIN

0:00 He I...

MATT

0:01 Hear you.

B.BARDIN

0:01 Is that you? A?

MATT

0:06 I think I've seen you, JT? Am I looking at JT?

B.BARDIN

0:10 Yeah.

B.BARDIN

0:13 Yeah, we moving in.

B.BARDIN

0:17 Hey, and this is?

B.BARDIN

0:18 Brad, Matt, I...

B.BARDIN

0:19 Hey, sorry?

B.BARDIN

0:21 Alan, general manager, we turn up the turn up our volume real quick. There we are.

MATT

0:28 Barton abilene general manager.

B.BARDIN

0:32 Yes.

MATT

0:33 Are you the one that just introduced them?

B.BARDIN

0:37 Yes. Yeah, okay.

MATT

0:38 Okay. Very good. It's nice to finally put, a face with the name.

B.BARDIN

0:44 Yeah, you bet man. So, I'm kind of out of the view here, but yeah, it's no problem. We're just kind of sitting in the office here. Yeah, man, I appreciate you doing this and we know Friday morning here, want to take a little bit of time with you. And just before we get started, what do we think time commitment is here is how, we get started here. This one. What do, what do you?

MATT

1:08 Time I can work around the schedule?

B.BARDIN

1:10 Okay. Yeah. You think you can kind of just give us a rundown in, you know, 45 minutes now or maybe something like that or you need a little more time?

MATT

1:17 Five minutes to, or I can show some stuff. You won't get the full taste of it. I locked to out.

B.BARDIN

1:23 Yeah, we'll see. Yeah, we'll kind of see how we get along and just kind of wanted to hear more about it and maybe show us you were gonna be able to show us some visuals too, right? For us to see. Hopefully and we, we've been working, you know, Brad has an extensive background and so do I, we've been working with Jonas stuff and mark has just kind of tasked us with let's see what's out there. And I know obviously before there was the connection to the Northboundary, and so wanted to holler at you with that. And then... just, we looked at a few other programs but wanted to hear kind of see, I see in action and so, yeah, that's great. Let's do it. Yeah.

MATT

2:06 Yeah. So, and the caveat to that, is I blocked too because people unsuspectingly end up loving what they see and it runs long and they've got questions and stuff. But

I promise if we get into this and you guys are like this is hot garbage. My eyes are bleeding. We can end this in like 20 minutes to keep you here to listen to me talk.

B.BARDIN

2:28 You're the band? Thank you for that. Appreciate it. It'd be great.

MATT

2:30 Yeah. And, and so we got Brad and jets or anybody else out a frame that's in the room that I'm not seeing.

B.BARDIN

2:37 No, no, just you got us.

MATT

2:40 Okay, very good. Well, so JT, we had a good talk.

--- Purchase decision ---

MATT

2:44 I think it was last week, maybe the week before everything's blurring together now and a few follow up questions. I just kinda wanted to clarify before we get underway here. You mentioned that you guys are looking or have looked at some other stuff. What, what are some of the things that you guys have looked at thus far?

--- Purchase decision ends ---

B.BARDIN

3:02 Really, I haven't even got this far along as we are with you with anybody. I wanted to kind of hear you out first because of the connection and hopefully, the, you know, the inter connection between Northboundary and service because we really have like the Northboundary program, we'd like to use it more.

--- Accounting integrations ---

B.BARDIN

3:20 But right now, with where we're at it's kinda redundant to use it more. So like if we're using it and we have our Jonas back office stuff and E mobile, their version of this product. And then we have expelled spreadsheets and we just, we're trying to look to let's manage the, you know, because we're getting up to all our other territories are still just on written tickets, old school, but this is abilene. We've moved to this Jonas E mobile and there've been some good things but it's just, it is kind of clunky a little bit and Brad can speak to a little more. He's been the one doing with the day to day, but it's just, I wanted to look and see if there's some, a little more user friendly.

--- Accounting integrations ends ---

4:02 We're having to stay up here, you know, four 30. These guys finish the day. Well, we do, sometimes we're not understanding. Okay. Well, they need to go back, you know, do we need to move them on a dispatch? We're up here till six o'clock trying to schedule the next day, you know, and it's just, you have 14 technicians and very easily we could add more. You know, we have that much work. And so we could be a 1,618 guys in a year and still have this same problem. And so anyway, yeah, your question, nobody else, we never got this far with anybody. I've looked at like BuildOps and some of like service tightened like your competitors. But like I haven't got this far. So we...

MATT

4:42 You say looked at, you mean, check out their website if I haven't done a demo.

B.BARDIN

4:45 Right. No, I haven't done a demo, just had a brief phone call with them. They're trying to schedule stuff, but I a, I haven't moved on it yet. So, yeah, perfect.

MATT

4:59 The other thing I wanted to clarify is you mentioned that mark, I believe he's your father is he's terrified of a cloud.

B.BARDIN

5:08 No.

B.BARDIN

5:08 I didn't said that he, we haven't moved that way yet. So we, it'll just be new for us and trying to figure out how that's all, how that's all gonna work. You know, we spent a lot of money on this Jonas system you want it to work, but anyway, just wanted to hear, hear out other options. So.

MATT

5:26 Yeah. Okay. I didn't know if there's any particular concerns around the cloud that I could address and, you know, provide some reassurance and.

B.BARDIN

5:36 As, we know the pros and cons more, just want to hear about your stuff and how that goes on.

MATT

5:42 Yeah. Okay. Cool. Well, let me get my screen shared here. And, and gentlemen, I want to keep this like a conversation. Like I said, my goal is not to talk at you the whole time. So if you guys have questions, comments, please interrupt me. I'm more than happy to stop and go back through something. The other thing that I want to say is, I mean, we know that Jonas sets the bar fairly low on the service side. Anyway,

it's designed for Construction, which is fantastic. But it's pretty closed off when it comes to service. So, I think I, you're gonna see a lot of stuff here that you're really gonna like? But what I want you to think about as you like this stuff is more of how is this gonna drive more revenue? How is this gonna allow us to hire more technicians and tackle more work? And something I like that you said... JT on our last call, is, how is this gonna unleash more of the potential of the great team you already have in place? So that's what I'm really gonna be keen in on.

--- Purchase decision ---

MATT

6:50 So I'm gonna be asking you guys some questions on that as well. Okay? And you guys can see my screen here? You see the mouse moving?

B.BARDIN

7:01 MM. HMM. Yeah.

MATT

7:02 Okay. So I just want to start off with a little bit of background on service rate kind of who we are, what we do.

--- Purchase decision ends ---

MATT

7:07 And I think a proper place to start is, you know, just high level. We were designed specifically for commercial service contractors. That's all we're ever gonna work with. And, and we work with two main verticals fire and life safety, and mep contractors. And that's all we're ever going to work with. This is a little outdated. We actually have over 1,300 active accounts currently more than seven point 5,000,000,000 in revenue flowing through our platform. And we've actually been in business over 11 years... and we basically, we're designed to address an issue that I'm sure you guys are familiar with and that is that there is a 40 percent labor shortage in your market, right? And that gap is actually getting worse by about eight percent every year as your season texts retire, fewer new texts are entering this guild trade. So that's not going away, which means there is more emphasis than ever for you guys to optimize your most constrained resource. And that is, your highly paid hard to hire hard to keep technicians, right?

--- Paper process ---

MATT

8:21 And there's a few different ways that we help with that, you know. So first of all, we're going to help you guys control your costs by improving, your services and your project operations, basically streamlining everything, consolidating your application. So your information is not spread across excel spreadsheets, I mobile paper tickets, Jonas so on.

--- Customer engagement ---

MATT

8:40 And so forth. The big thing here is setting your technicians up for success, providing them with a user friendly more.

B.BARDIN

8:46 A that works both.

MATT

8:47 Online and offline makes it easy for them to take pictures, videos, audio memos, that information arrives in real time back to the office. So you can see when they're done. You can see when they're in Progress. But the ultimate goal here is to help you guys grow quality revenue. Some more service agreements, win more projects. This refers to Northboundary, which you guys are already doing. Probably explains why you've been averaging about a 60 percent growth year over year at least the past few years... and then ultimately grow profitable customer loyalty. This is a big part of our playbook growing into profitable loyalty. I will be referencing this a few different times throughout, the presentation because this really refers to what I call becoming the amazon prime of your market, being the easiest company in town to do business with, making it easy for your customers to access service documentation, whether that's tasking sheets, pictures of repairs before and after an online customer portal, where they can log in and see all their equipment history, access, repair, quotes, pay invoices online because this is the kind of stuff that helps differentiate you from the competition, but it's all also the stuff that builds trust in your customer portfolio. It keeps them around longer even in the face of price increases. So all that makes sense so far?

--- Customer engagement ends ---

B.BARDIN

10:08 Yeah.

MATT

10:09 Okay. Excellent. There's some more slides in here. I'm gonna spare you guys of those. This is kind of, the nutshell that I really wanted you to capture before we dive in.

B.BARDIN

10:19 Yeah. And I'll just say this, Matt, I really appreciate it. You've done a great job already. I, we are sold in the factory. You guys are great, but really what we're and, we kind of... we've done a lot of homework as far as what we need. And, and so really the quicker we can get to the nitty, I know you got to do our presentation. I appreciate it really do I'm serious because I'm in sales too, I understand. But we kind of want to see what you got because we're ready to kind of do something we us, we want to see kind of how this is because all these things you're saying that's exactly what I'm talking to you. I mean, this is exactly what we need perfect just about if we can make it work. So thank you, thank as possible.

MATT

11:02 And I'm picking up on the sense of urgency that's why I'm skipping the rest of this and I'm gonna be showing you three views of service rate. We're gonna start out of the office. We're gonna take a trip out of the field of the mobile app, and then I've at least set you up JT as a pretended customer. So I'm gonna be sending you some stuff so we can get some audience participate.

B.BARDIN

11:21 A year. Awesome.

MATT

11:24 All right. So that further here's the office. So when the office signs in, they're gonna land at what we call the service dashboard. Now, think of the service dashboard is home based. It's basically a 30,000 foot overview of the different stages of your.

B.BARDIN

11:38 Basically, yeah. So for example, we...

MATT

11:41 The daily schedule, this is not to be confused within this batch board. We also have one of those, but this is basically a list of all the jobs going on today, who's doing, what, who's where, underneath that, we got overdue jobs without appointments. So this is the stuff that slipped through the cracks on us. This is a priority. We want to get on top of this. So we're not missing services.

B.BARDIN

12:01 Boiler to in the...

MATT

12:06 Now, the next one is jobs without appointments due in the next two weeks. This is the stuff that's about to slip through the cracks on is if we don't make it a priority. And then the next one, this is another big one, past jobs to be marked complete.

--- Tech On-site ---

MATT

12:19 So these are all the work orders that have been completed by the technician. They just go into this review bucket. Now in real time where a service manager, office manager is gonna go through these either market complete or add another service or a follow up visit. It's just basically a checks and balance so that you guys can have that quality control layer before passing it on to billing.

--- Tech On-site ends ---

MATT

12:41 And then lastly, we've got completed jobs to be invoiced. So you can kind of see this assembly line format to keep you guys on track, making sure you're not missing anything. I'll note that you guys can run, a bunch of different reports using a plethra of different filters to drill down even more specifically into this information.

--- *Customer engagement* ---

MATT

13:00 But the whole purpose of the service dashboard is to provide you with that immediate and convenient visibility as soon as you log in, you're hit with your priorities first thing in the morning without having to go dig in for them.

B.BARDIN

13:13 It's a mix of maintenance and service. What's a, it's a mix of maintenance.

--- *Customer engagement ends* ---

B.BARDIN

13:19 Like, so some like the preventative maintenance visit for trader joe's college road, that may be generated from Northboundary ever quarter, for example, right? So it'll be diffrent here.

MATT

13:32 It'll be different. So think of Northboundary as the door man. You guys have probably been extending Northboundary to try and do some of this stuff. But you're noticing that, it has its limits and there's kinda like where it stops and maybe Jonas begins is kind of like an awkward marriage there.

B.BARDIN

13:49 Yes, that's exactly right. Yeah.

MATT

13:52 Northboundary is the door man that's gonna be your primary source for selling new maintenance agreements, selling new projects, you know, dialing in your margins, establishing the tasking and the ants and all that stuff. And then once that stuff is on in its current state, we're developing the integration. Only a few things go over the customers, the equipment list and I think the services. But when that integration is fully developed, it's gonna send over the tasking, the pricing contracts, and a bunch of other stuff.

--- *Recurring maintenance* ---

MATT

14:21 So, Northboundary is the door man that's where you bring it in service trade is where it takes it from there and run all the execution. So it's gonna keep track of when your maintenances are due. It's gonna keep track by the way you're seeing

maintenance in here. But a job in ServiceTrade is actually a work order. We call it a job, it can be.

--- Tech On-site ---

B.BARDIN

14:40 Yeah, everything will have a work order whether it's PM or service.

MATT

14:43 Exactly. So it can be, a small retrofit. It can be a service call, PM inspection, all that stuff.

B.BARDIN

14:50 Okay.

MATT

14:51 Good question.

B.BARDIN

14:53 I'll...

MATT

14:54 Give you guys.

B.BARDIN

14:56 Just while you're on this board here, you have your GPS tech locations. Does that tie in, who do you partner with on that as far as the GPS?

MATT

15:08 Great question. So what you're looking after the GPS there, that is natively tied to the location of a technicians cell phone. So when they clock in and out of jobs, it's gonna give you a GPS snapshot of where they last clocked in or out. If you guys are looking for something more like realtime seeing a car drive down the road where you can track the speed and all that stuff.

--- Accounting integrations ---

MATT

15:30 We partner with a company called a zouga and they have developed a pretty impressive integration with ServiceTrade, to kind of marry those two together.

B.BARDIN

15:38 Okay. But, but our current cellphones would track on that when they clocked in where they were at...

MATT

15:45 Exactly, right?

B.BARDIN

15:46 Because Matt, we use enterprise rental car service for our leasing our vans and we keep all our vans.

--- Parts management (inventory) ---

B.BARDIN

15:54 Well, it's not there yet, but ideally, we're going to have all our vans to stay under 100,000 miles and we just keep getting new vans, right? Well, as part of that, they handle our GPS services, that's like a second by second update plugged into the port of the truck, you know? So we can still utilize that separate over here, but you all will have this for. Okay. All right.

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

MATT

16:15 Yeah, thanks for calling that out. Yes, the importance of GPS kind of various customer to customer. Sounds like you guys have a good use case for it and why you do it, but a lot of people find you don't actually need those two married together. Usually the clock events of the mobile app will be just fine in terms of where the techs are located and how they're spending their time... now to give you guys a better idea of where all this information is coming from, where it's living.

--- Recurring maintenance ---

MATT

16:42 I think it's helpful to look at our data model. So, because we were designed specifically for commercial service contractors, we know how important it is for you guys to distinguish between that Bill to, and ship to address. So, for example, a lot of your customers might be parent company's, corporate headquarters, which is your Bill to, but underneath which you're responsible for servicing several different physical locations.

B.BARDIN

17:03 Yeah, that's...

MATT

17:04 Now, in service strait, each physical location is gonna have its own designated page. And this is where all the information for that one location is going back to live.

--- Recurring maintenance ends ---

MATT

17:16 Starters, this is where you can list the site contacts for that one service location. I'm actually gonna take this opportunity to add Brad to it... so we can get some audience participation for him as well, right? What's a good e-mail for you?

B.BARDIN

17:36 As in boy, dot, Martin vardin at carry services dot com.

--- Recurring maintenance ---

MATT

17:45 Very good. So we can track, our site locations. I'm sorry, our site contacts, but this is where we track those maintenance contracts as well as one time off services. So this is kind of an important part of our platform. The difference between these one time off services and these recurring services is once this one time off services completed, what I mean by a one time off service by the way is say a repair quote comes through approved. So now you get the service to throw on a ticket. Once that's completed, it's going to disappear from the services section. It's gonna go into your work order history. Whereas these PMS, these recurring services I want think of these as a set and forget. So when you win that agreement, all that information is going to then enter into ServiceTrade. It's going to have the scope of work for that visit. How often that visit recursestimated duration? You can have an estimated price. You're going to associate it with a piece of equipment or a group of equipment. You can assign preferred text either by certification or maybe customer relationship. And then of course, you're gonna have your scheduling window. Now, most PMS, you just need to be out there within a given month, but you might have the occasional customer that needs you out there the third Tuesday of every third month at nine o'clock in the morning because that's when they can shut down the kitchen, you can get that granted service rate. But now there's a couple of key things that I want to highlight here. This is a set and forget. And because we're putting in how often it recurs service trade is gonna then allow us to keep track of when this service is due. So this is going to allow us to forecast all of our services due in the next month across all of our locations, right? But each time this service is completed by the technician, it's going to automatically update the next time that it's due, right? So instead of you having to enter four quarterly visits or 12 monthly visits or whatever it may be, you're putting this in once as a set and forget, and it's gonna keep you on track for each subsequent visit thereafter. Is that?

B.BARDIN

19:50 What about, what about the billing side of it though? Because what we do now, and Jonas, as we set up a food pantry bank of abeleen, is a, they've signed a quarterly agreement with us and in february, may, august and november, on that quarterly cycle, we're billing them a proactive billing the first day of the month that invoice goes out. And so we're doing it sometime in february. Is that all being handled as well?

MATT

20:17 Yeah. So, and we have a lot of customers that do the same, which means that your invoice is not based off of the actual work order. So you can do it in order. So you can set up a billing frequency in here for that maintenance. And when it comes time to complete this work order, you'll be able to indicate that there's already an

invoice for this service, and you'll be able to associate that with the jobs. So you're not billing them twice a.

B.BARDIN

20:38 Okay. It's like a contract module, right? So, like that's what Jonas says as a contract or where we have hundreds of these maintenance agreements varying from visits of 200 hours to one hour maintenance visits on different months, different quarters. And it's this whole matrix of right? Like, you know, whatever widely school district is due these months, and they have specific hours each quarter, and then other customers do this month and they have different you so that all is gonna be kept. Okay?

MATT

21:15 Again, we're looking at this one service site, right? So this is where we can outline and detail all the specific services, the frequencies and the schedule for this customer on, or?

B.BARDIN

21:24 So, this is just one customer.

MATT

21:26 Yeah, this is one.

B.BARDIN

21:28 Okay.

MATT

21:28 We're still on this proper Houston location page.

B.BARDIN

21:32 Wow. All right.

MATT

21:33 Yep. So we've kinda dialed in deep into our database and we're getting nitty gritty granular that's all the stuff that serve as trade tracks, but on this same location page is where we can also set up a recurring invoice or a billing frequency if you guys are doing the proactive billing. Okay. Yeah, a lot of our customers are doing that. Now, the other thing that these recurring services act as is they serve as a sort of stamp or blueprint for all future?

B.BARDIN

22:00 Work orders?

MATT

22:02 What I mean by that is I can run a service opportunities report right here... in which I can select my, you know, however far out I want to look. So maybe I want to see, you know, the next two months across all of my offices or divisions all services. And maybe I want to be super specific. Maybe I just say I want to look at H vac, right? Or maybe I want to throw, you know, maybe I'm just looking at hvac and refrigeration. Now, when I hit search here, what ServiceTrade is doing is it's combing through all of my location pages and it's extracting a list of services that meet my search criteria?

B.BARDIN

22:46 Okay. Maintenance or service? Because you say all services. So it could be a maintenance or order too. Yeah.

MATT

22:52 Yeah. Or if I just wanted to do recurring services and I'm just focused on maintenances that's what I can look at. But the idea here now is, you know, at a given sight, maybe I've got a monthly, a quarterly and an annual all lining up in the same service window. Instead of me having to keep track of that or track it in an excel spreadsheet or anything. It's going to automatically consolidate those services to one ticket. So we can knock it all out in one fell swoop. So with this method right here, I can bulk create hundreds of work orders and one fell swoop. And when I create that work order, it's gonna transfer all of this detailed information, the scope, the piece of equipment, the customer location, it can assign the preferred technician. All that information is going to transfer over to hundreds of work orders that are now locked in.

B.BARDIN

23:44 Loaded and ready.

--- Quote templates ---

MATT

23:45 To dispatch out to your technician?

B.BARDIN

23:47 How did you get all that information in that work order?

MATT

23:50 Well.

B.BARDIN

23:52 So...

MATT

23:54 Right. I can either come in here and manually enter this stuff, right? I can use a service template, so you can actually create like a standard template for, you know,

different maintenances.

--- Recurring maintenance ---

MATT

24:05 But with the Northboundary integration, once that's developed, you're gonna be able to click and just pass over all the stuff that we're already quite.

B.BARDIN

24:11 Yeah, because see, we've already done this. We've created in Northboundary, we sell maintenance agreements. We have that maintenance agreement and maintenance management. And we've actually went into tasking management and we've created specific templates for various pieces of equipment, train aircooled, scroll, compressor, chiller, and we have a specific tasking template that I'd like to get. And then here's the other thing specific tasking template for each quarter. Even. Yeah, right? So, like in the April PM, we're doing a lot more tasks than the january PM. Yeah, right. And so that it gets real detail. But you're saying if it can cooperate then that's great.

--- Recurring maintenance ends ---

MATT

24:51 That's exactly right? So native tasking is one of the ones that's hot off the press that's anticipated the release beginning of Q2. It's basically already developed. It's just gonna go into beta where we're going to roll it out to our customers, but it's exactly what you're describing and that is part of, the marriage between Northboundary in service.

--- Recurring maintenance ---

MATT

25:11 So you're gonna be able to take that custom tasking and it's gonna be set up per piece of equipment, you know, whether it's a, you know, quarterly come cooling comprehensive, or a cooling Miner or whatever you call it even down to the different class technicians that you're sending out to do that.

--- Recurring maintenance ends ---

B.BARDIN

25:28 Okay. If you had a preferred technician because we, you know, you have a certain level of guys that you need this guy going. What happens if that guy leaves the company? Can you a, do you have to go in and take them off of each one? Or can you do a mass? We're going to replace this guy with this guy and it will cover all his task?

--- Assets ---

MATT

25:48 Yeah. You could do a bulk reassignment?

B.BARDIN

25:50 Okay.

MATT

25:51 Yeah. Good question. The other thing that I'll point out while I have this screen open is you can also associate certain job items with that service. So if I know that every quarterly I'm going out working on 20 units of this make model, these are the different belts filter sizes and all that stuff instead of the technician or the office having to remember all these parts and pieces on the job by job basis. It'll automatically prepopulate these items onto those hundreds of work orders that you created?

--- Assets ends ---

B.BARDIN

26:20 And you, that might that'll all come from Northboundary too, mate?

MATT

26:25 Yeah. Absolutely. Could you guys got a parcel list in there too, right?

B.BARDIN

26:29 Yeah, we have to put all that like we can put preferred tech in there, but we can put filters belts and maybe they want uv lights change once a year and they're priced in the agreement or whatever, you know, odd ball, things like that. And so.

B.BARDIN

26:43 The tech will see all these things correct?

B.BARDIN

26:46 On his, no, okay.

MATT

26:49 So they can actually look at their upcoming jobs and they can use this as kind of like an order list or like a checklist to make sure they got all that stuff in their truck.

B.BARDIN

27:00 Good deal.

--- Quote templates ---

MATT

27:02 I don't want to go too far without the.

B.BARDIN

27:05 We'll, go ahead that's fine. Let's see. So.

MATT

27:11 I just wanted to make sure that, this here made sense that when I create these jobs, it's not just creating, you know, hollow work order templates with the customer name, but it's actually transferring all the details the technician needs to go ahead and do that work.

--- Quote templates ends ---

MATT

27:25 So, there's literally no prep work beyond running the report bulk, creating the jobs. Now, they're in your system that are on your dispatch board that are on your dashboard. You have full visibility of everything that needs to be dispatched.

B.BARDIN

27:37 Yeah. How it works now. And Jonas, like... when a, yeah, I think I see said we already have programmed in february first, all these PM work orders are due, right?

--- Recurring maintenance ---

B.BARDIN

27:51 So when it rolls over, we hit generate and it generates all these PM work orders, but all that's really in those work orders, we're able to put some like if it's a PM work order, it'll say like eight pieces of equipment, you know, on that PDF. And then we send that in an e-mail to the tech with the PDF, right? So you're saying, yes.

--- Assets ---

MATT

28:22 Yeah. Well, I'm about to show you how we track assets in ServiceTrade, which... I, from what I understand and speaking with customers, nobody else does it exactly like we do as far as, you know, like what you just mentioned having a PM work order with a list of equipment, you know, it's just kind of like the names of the pieces of equipment, so they can identify it. But it's not actually tracking each individual piece of equipment as its own physical record within your database.

B.BARDIN

28:49 Yes, cool. Cool.

MATT

28:52 All right. In addition to your services on the location page, this is also where we track your assets.

B.BARDIN

29:03   So...

                                        MATT

29:04   For example, I can see here at this demo location, we've got a walk in freezer, a
walk in cooler, and we've got a group of five rooftop units, but we also have this
concept of parentchild relationship which means if I want to see the different
individual units that make up this group, I can see the assets. And now, I'm looking
at each individual rooftop unit, I can see the make model, serial number, belt size,
belt, quantity, refrigerant, type voltage. And there's a bunch of other information
that I can track... but I can actually drill down a step deeper and open any individual
unit at this one service site.

                                        B.BARDIN

29:53   Nice. Let's...

                                        B.BARDIN

29:55   See you.

                                        MATT

29:59   Sounds like I still got somebody with me. I lost people on the camera.

                                        B.BARDIN

30:02   No...

                                        B.BARDIN

30:03   Worry. We're here yet.

                                        MATT

30:07   So now, I'm looking at this one unit at this one location. And here, again, if I
want, I can edit this, add a bunch more information to it. There's quite a bit of stuff.
But more importantly, I can see all the different services I have associated with this
one piece of equipment at this one site. I can see every past work order ever
performed on this one unit. At this one location. I can see any repair opportunity
ever found at this, on this one piece of equipment at this one location. I can see every
repair quote ever sent out. And I can also include things like, you know, schemaics
diagrams, whatever associated with this one unit, whether it's a spec sheet and this is
information your technician will be able to access from their mobile app as well?

                                        B.BARDIN

30:55   Well.

                                        B.BARDIN

30:56 Do we have to put all that in or is that generated through the app through the program?

MATT

31:04 So...

B.BARDIN

31:04 This would be at the technical diagrams or is a, we put the equipment in and then do we have to put in the attachments for what you just had, the specs and everything?

MATT

31:17 That's exactly right? Are you, U, are you guys currently tracking individual pieces of equipment like this? Do you have an excel spreadsheet?

--- Assets ends ---

B.BARDIN

31:26 We tried to, so technically in Jonas, you can... when we generate a maintenance agreement, the contract module and food a viable. We can a, and, we take E, we take the excel list of equipment the Northboundary generated out and we put it into Jonas and it does show up in. So technically, when they call in, they can say, hey, cooler one is down and we could choose that one in Jonas and put it in there. But our ladies don't do that. They just take it just a, and see a lot of time. It is vague because the customer doesn't know and they just say no heat in the building. Well, we can't pick, you know, RT1 is not heating, you know, but yeah, we tell our customers that we can't so like when that call is done, the tech should have put mate model serial, which unity worked on. And then we send them an invoice. Well, if they call us six months later and say, hey, where's all my cost? Then we can kinda decipher that and going through all the invoices but it's not really like this. So this would be, yeah, this would be new.

MATT

32:39 Yeah. No, that's a good call out. And, and that's my understanding of really most service management platforms out there is it's tedious and cumbersome to connect and tie the equipment with the service history, which is, you know, one of the things that our customers love about service rate, is we make it easy to associate that work history not only so that you can share it with your customers.

--- Assets ---

MATT

33:00 But then it makes it easy for the technician to associate that equipment with the service that they went out there to do. And back to your question, Brad, if you guys have sold agreements in Northboundary with all the equipment lists, you can export that stuff into excel spreadsheets and our team can import those assets into your ServiceTrade account, so that you're not doing a bunch of manual setup right out the gate.

B.BARDIN

33:26 Okay. The other question is once we have all those assets in there, can we go through a customer and pull out by age, like search assets by age and stuff like that? Because that's something I feel like, you know, with us, you know, we deal with school districts and stuff, and we, if we could pull that out and say, hey, here's, all your units that are, you know, 18 years old, you need to budget, you know, to replace these, you know, it's kind of not that they're going to, but it helps those service managers and facility managers to have that to move forward with. How easy is that to pull out?

--- Accounting ---

MATT

34:10 You see here, I can either grab a customer location or a customer built to, for all their locations and I can run a report on the assets that I'm looking for. I can export that into an excel spreadsheet and then that's where I'm gonna see like the creation date and all the different details where I can parse out whatever assets I'm looking to get rid of.

--- Assets ---

B.BARDIN

34:29 Okay. But you couldn't put your parameters as, you know, 10 plus years old or something?

MATT

34:38 It doesn't look like it in here.

B.BARDIN

34:43 You pull all the assets and then you would see the age of them if we had, because we have age on the office, serial numbers and stuff like that in Northboundary currently.

MATT

34:55 Yeah, yeah. You'd be able to do that with the export, but it looks like the search function doesn't include that filter in here.

B.BARDIN

35:03 Okay.

B.BARDIN

35:08 And you...

MATT

35:09 Questions about the asset, how that's track the history and all that.

B.BARDIN

35:14 No, I mean, I like, the platform there. It looks real user friendly. So, so, no, I'm good on that.

MATT

35:24 Awesome. Good to hear.

B.BARDIN

35:26 Yeah, it had EPA, we got something going on. So, anyway, but.

MATT

35:34 That's okay. You guys are taking shifts. There's nothing wrong with that. A business continues. So please. All right. I'm gonna go back to the location page. So if you think of, the drill down asset view is kind of the micro and think of the location, the macro, when I'm looking at the location, I'm kind of seeing a lot of the same stuff for this piece of equipment. But instead of job history for a particular unit now, I'm seeing all of the work orders across that one service location. I'm seeing all of the deficiencies found across that one service location, all the repair quotes and even things like site specific comments. I like to refer to this as a digital breadcrumb trail. Just fewer things for you guys to have to remember to tell the texts. It is, you know, allows them to get in and out of the job with fewer phone calls back into the office for things like gate code and parking access, and that kind of stuff.

B.BARDIN

36:31 Okay.

--- Quoting ---

B.BARDIN

36:32 You said on our quotes on that dashboard, does it show us which quotes are, you know, outstanding? I know on that main dashboard, it says we've got, you know, these tickets fell through the cracks. Is there a way, to have your quotes to see which one of those has, you know, been outstanding for a little bit?

--- Quoting ends ---

MATT

36:54 Another great question. So another thing coming down the pipe this year is a more customizable widget style dashboard where you guys can put in like widgets for quotes or jobs, the things that you care about currently, the way to do that. And I'll show you this a little later in the demo as well.

--- Quoting ---

MATT

37:14 Is you see these tabs up here? These are how you can run all sorts of reports. So whether there it's jobs, quotes, invoices, I can easily pull up a report here. Use a variety of different filters to drill down into my quote pipeline. So if I want to look at quotes for, a specific salesperson, now, I'm just looking at all their quotes. Maybe I want to do it by quote status. Maybe I want to do it by expiration date. I want to do it by completion date by a particular customer. I can run a report and easily sift through my pipeline to find out what's outstanding, what requires follow up and so on and so forth.

B.BARDIN

37:50 If, you know, sometimes you get them out there and then you're onto the next one. So that would be a good way to.

B.BARDIN

37:56 Able to search a quote? Yeah.

MATT

37:59 Awesome. Yeah. And I think you guys are gonna really like, the quote workflow in here. The way you guys are probably doing like pull-through repair quotes in Northboundary. Is that right?

--- Paper process ---

B.BARDIN

38:11 We're actually not even using that Northboundary, no, we literally just... we'll take the service call the tech will, you know, make the diagnostic, you know, repair and then that's a work order, right? So, you know, no heat in the building. We get out there and we just literally do a, on a print out of a piece of paper or excel. We have, we have our own worksheet that we use to price jobs and that guy will fill that out, turn it in. And so if that gets approved, then we create a new work order for that. There's really not a set process on that. Okay?

MATT

38:55 Once you get into the excel spreadsheet, you turn that into a PDF emailing to the customer. They print sign scan and send it back to you.

B.BARDIN

39:04 Yeah. So, yeah. So like if he finds the induced draft motor failed, then he literally stops it, doing it, goes, works it up on a piece of paper, sends it to the office. The office puts it into Northboundary in project management and makes it look real pretty with no, you know, they obviously don't show our worksheet.

--- Paper process ends ---

B.BARDIN

39:25 They just send a formal like four page proposal like replace in new strap mode or 1,500 dollars, you know... that's kinda how we do that. Then if that gets approved

and we generate a new fixed price work order... okay?

MATT

39:43 Awesome. We're gonna circle back to that. So I've set us up a job here.

--- Tech On-site ---

MATT

39:50 Remember job AKA work order. We are still in the office. We're looking at the office view. I see our Bill to address our ship, to address. I see the appointment details on here. I see we got our best man on the job. And I can also see on this work order that we've got three different services to go out and complete.

--- Assets ---

MATT

40:08 We've got quarterly PMS on, the walkins as well as the group of rooftop units. And then a quarters down below. I can see all of the pre associated items that I'm expected to use on this job. So I don't have to do a bunch of clicking or extra steps to compile that.

--- Access to information ---

MATT

40:23 Now we're gonna be coming back to this view after we take a trip out to the field. It's it's pretty straightforward but, I don't like to assume. Any questions on the office view?

B.BARDIN

40:32 Work?

MATT

40:33 Order before, we pull up the mobile app.

B.BARDIN

40:38 No, I'm good on that.

MATT

40:40 Okay. Excellent. So... we'll throw our technician had on. And now we are looking at the ServiceTrade mobile app. Now, this is compatible with android. IOS, can be a smartphone, can be a tablet. And when the technician logs in, they're gonna have a few different ways of looking at their work.

--- Access to information ends ---

MATT

41:57 So they can see any jobs with appointment details. Maybe you will assign like maybe your control technicians, you'll give them some jobs that they kind of manage their own book of business and they determine the appointments that'll be under the unscheduled. But it's in their name. And then of course, any completed jobs, they're gonna be able to see any jobs they've done in case they need to retrace their steps, or backtrack. I've got it on scheduled and I've got it filtered by today so that I'm not being bombarded with all of next week's work, and all of next months work.

B.BARDIN

41:28 So this is all the technician sees right here and, okay. Entry.

MATT

41:37 Yeah. What, what's...

B.BARDIN

41:38 Not TAM if we don't put anything on and they don't see anything.

--- Access to information ---

MATT

41:42 So there's a couple of things there. Actually. I'm glad you called that out. So for example, again, the mobile app was designed with simplicity in mind. We want to make it as easy for the technician to understand what they're doing and digest it. So I've got it filtered by today. I kept it simple. I've only given Matt one jump and.

--- Dispatch ---

B.BARDIN

41:56 I see.

MATT

41:57 Yeah, but if I filter this off, I can still look out into the week or month and plan my work if I want to take a look ahead, right? But now, I see I've got this one job. If I was to assign something in the office right now in real time, I'd see another job pop up, you know, so I can be feeding my text jobs, but to your point, JT, I don't know what your preference is, but there's the concept of releasing and unreleasing jobs to your technician. So your dispatcher may want to lay out all the jobs for the day, like a chessboard right? But they have them all unreleased and they only release the jobs as technicians complete.

B.BARDIN

42:35 That's how we want to do it and until we see a different way. But here's our biggest problem is incomplete. So we go to that, Roger Houston, even a maintenance like that, we do the maintenance. And I, we don't even know if that guy is gonna say he's incomplete or complete, you know, until right at five. And then we go, well, we

got to put that back on him for tomorrow, you know, more importantly for a service call, right?

--- *Dispatch ends* ---

B.BARDIN

43:04 So, he drives a, out there does a repair and then he goes, well, I'm gonna need to come back first thing in the morning then can we have that stay on him like it is there until he completes it type of thing?

MATT

43:17 Yes, you can. So.

B.BARDIN

43:19 So the way...

--- *Access to information* ---

MATT

43:20 It usually goes, and I'll ask a clarifying question. Are you referring to the E mobile, Jonas app? Are you talking about the paper tickets?

B.BARDIN

43:31 Well, an E mobile, we'll put a service call on the dispatch board. He gets it on his phone. He goes in route onsite complete.

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

B.BARDIN

43:40 I'm sorry, incomplete holding for parts. And in his ticket that we see, he says order parts for local supply house. We'll be ready first thing in the morning. I told this customer, I need to be back out there in the morning to do this well at four o'clock we made our schedule and we already put them somewhere else because we, it, it's not a streamlined thing, you know? And so we have to say, no, you're back to being over here again? Yeah.

--- *Paper process* ---

MATT

44:13 Yeah. So it sounds like there's a delay in communication from the field to the office. You guys aren't finding out until the end of the day, okay?

B.BARDIN

44:20 Yeah. I, they turn their ticket till they hit incomplete parts on order to, we get a status. We don't know unless we're communicating via text or phone call or

something with that technician.

--- Paper process ends ---

B.BARDIN

₄₄:₃₅ So, and then at that point, we get it in, but we've already got the next day lined out and then we have to reassign that ticket to them. We were just wondering how that would happen on all that.

MATT

₄₄:₄₉ Yeah, great. No, I'm glad you guys brought that up.

--- Tech On-site ---

MATT

₄₄:₅₁ So in our app, the technician cannot move on to the next job until they have clocked out of a certain job which automatically gives you the status. And there's some other cool bells and whistles that I'll show you. I think you guys are really going to like, that address specifically a technician needing to fill out certain information before they can move on. So they're not leaving you guys, you know, clueless about what happened on that job. So I'm gonna back up real quick to help colour this in. If you think of a work order as a menu, right? The services are the menu items, but then you can also... establish appointments and those two can work independently of another.

--- Dispatch ---

MATT

₄₅:₃₂ So, for example, you might have one service that's gonna be a really large facility and it's a three day maintenance. So you can have three appointments for that one service. So when that technician goes out to complete and O, he completes that appointment, it's gonna stay on his calendar for the next day because he has to go back out there and do the second appointment, right?

--- Assets ---

MATT

₄₅:₅₅ But likewise, let's say there's only one appointment and there's three services like what we're working with here. The technician is able to bang out the rooftops but let's say that he couldn't get access in the kitchen because they couldn't shut the kitchen down or whatever it might be.

--- Tech On-site ---

MATT

₄₆:₀₈ He can now when he clocks out, he's gonna have to indicate what was completed and what wasn't and then he'll need to leave a comment in the app saying,

hey, I wasn't able to get to these, throw this on my calendar or whatever. He can't move on to the next job until he's done all that stuff.

--- Dispatch ---

MATT

46:20 So once it's done in real time, you guys are gonna have visibility of those jobs. So instead of getting this massive batch of jobs at the end of the day, when the technician decides they want to put a status on it, you're gonna get a real time feed of jobs trickling in from the technicians, where I'm gonna be able to see things like, hey, one of one services were completed two of two up here.

--- Tech On-site ---

MATT

46:42 So those are probably ready to review. And Bill, I see this little flag showing that they found a deficiency on a piece of equipment out there. This job here has zero of one services, but the technician completed the appointment. I want to read the comments. I need to figure out what we need to do whether it's order, parts, add a new. Appointment. So you can be working through this review process in real time as your technicians are completing this work. What are your thoughts on that?

B.BARDIN

47:12 Well, my question, is I, so we've scheduled that work order out for, you know, 16 hour PM. We know he's gonna take two eight hour days to complete it.

--- Dispatch ---

B.BARDIN

47:25 So we're saying that Monday and Tuesday, he's scheduled to go out there. So he completes day one, it's still on day two. What if we had to send a different technician or something happened to where that guy didn't get back the next day? How does that?

MATT

47:44 You, can, you can easily do that from the dispatch board or I could even do it right here.

--- Dispatch ends ---

MATT

47:48 IU, I could edit any one of these services or just edit the whole job. And I could get Matt off of there and simply add my next tech, right? So I can.

B.BARDIN

47:59 The first guy he would, yeah, right now, how we do it is, if a different guy goes on a PM on their phone, they're filling out Northboundary tasking... and so they can see that I've done eight rtus, I've done those, but I need to still do nine and 10. And so that guy will see, well, he's already done the tasking for those. So we'll do this. And I see we're like the maintenance like that I kitchen master bit.

--- *Assets* ---

B.BARDIN

48:27 So there's like is every asset of its own maintenance thing? I'd rather just be like, you know, while school district all the maintenance for that. That makes sense kind of.

MATT

48:38 Yeah, it does. And, I understand, the point. So if I wanted to, I could put these units under their own asset group and just walk INS, right?

--- *Assets ends* ---

MATT

48:48 And I can assign one service to all of their walkins. So you can absolutely do it. That way, this kind of offers you the flexibility one to be more specific about tracking, that service history, but also so that you have the flexibility to complete one service, not complete another and come back the next day.

--- *Assets* ---

MATT

49:06 So you have a more accurate picture of what was and wasn't done versus hey, we've got a PM for this entire building and all the equipment. I couldn't do it all, but we, we'd have to dig through his tasking to find out what he actually got done. Does that make sense?

B.BARDIN

49:20 Yeah, I think so. Yeah, yeah.

MATT

49:22 Yeah, but you've got a lot of flexibility in how you set that up that's personal preference.

B.BARDIN

49:25 So, if we had, I don't know, I'm gonna say 80... units, on a hospital, they would have 80 tasking list under their.

MATT

49:42 Yeah. So they'd have 80 tasking 80 tasking sets in the mobile app to work, but it wouldn't show 80 services on here. So, for example, this is RTU group five. That means this RT you group is comprised of five units. It's a simple example. So if you got a hospital, you might have the east building, west building and each one has 20 units on it, you might just do two or three different.

B.BARDIN

50:08 Groups with...

MATT

50:10 20 sub assets, right? So you're assigning one service to the west building, one service to the east building, or if you wanted to do the whole all east west north south buildings, you can do one rooftop unit group and have all 80 units up under that. So you guys have flexibility on how you set that up in?

--- Assets ends ---

B.BARDIN

50:26 Of course, we might U, I don't know how it's going to look from Northboundary integration, but we might just build a O, and I wish I could do a share screen maybe of like what Northboundary assets look like because for example, like there was a regional like a hospital and we did like the Jones wing, you know, arts one through 10. And then in Northboundary asset list, I wish we could just move the Northboundary asset list over to here, maybe.

MATT

50:52 That's that's so that's what it will look like. If you guys have those asset lists already living in the Northboundary, then again, it's an export our team will help with like the reformatting load those into your service trade account. So you're not losing that organization. Okay?

B.BARDIN

51:08 Okay, great. Yeah, that's good. Yeah. All right.

MATT

51:12 Now, I saw you guys nodding your head, it sounded like it was pretty appealing. The, the concept of a tech not being able to move on to the next job until they had clocked out, so.

B.BARDIN

51:23 Here's what's happening in E mobile is we'll give the guy three three things.

--- Tech time tracking ---

B.BARDIN

_{51:26} We'll we'll add them on three things and he won't even update anything until eight o'clock that night and he'll maneuver the hours on each one. So he make sure it gets his eight hour a day and we want them to get an eight hour a day. That's not the concern it's just more importantly, we just want them to do how it's supposed to be done.

--- Tech time tracking ends ---

B.BARDIN

_{51:45} You know, right away. I mean, we want to take care of them and the customer in the right way. So.

B.BARDIN

_{51:50} The, we're getting hit with those at eight o'clock at night. And then we, you know, you're looking to, well, we didn't finish that, you know, why not. And it's just too late in the evening, to a, we don't want to be messing with it at eight o'clock at night. You know, we've been doing it all day. So it's just a way we're working towards getting our technicians to do that. But I like that to where they can't move on to the next one would be now we could go sign on a completed. We can handle that here. But then you have to have somebody sitting there going, you know, as soon as they're done and it's completed, then you have to send it out in mobile. And you know, you also have that deal too. So we kind of try to give them a day, you know, maybe two work orders, but maybe three, maybe five, you know? But... if we know they're gonna need to go there. We'll go ahead and assign all of them.

MATT

_{52:53} Yeah. That's big for a lot of our customers, being able to put blinders on the tech because some texts will maybe run the clock out if they got done early on a different job because they're worried, you know, they know, they've only got one or two left and they want to milk it and make it happen.

--- Dispatch ---

MATT

_{53:06} So, you know, you again, you can lay it all out on the dispatch board, keep them all unreleased tech will have no visibility of it. And then in real time, your dispatcher can see the time they're spending on the job, the stuff that they've done. They can see as soon as it's completed. And then they just release the next appointment. So it's like feeding jobs to them like hamster pellet throughout the day.

B.BARDIN

_{53:24} Yeah, you're right? Some of the guys can, a, we can show some of the guys some so that like our lead tech can, he can go ahead and get a few scheduled on his own. Now, if he does that, we'll show up on our dispatch board retroactively. Okay. Nice. So Josh goes. Well, I need to take that Zane, Dennis, I need you will do that tomorrow morning, but his wife can't let me in to, you know, so that kind of stuff he can just do on his own and put on our big dispatch board. Great. Okay. Yeah, that's one that takes off the pressure off everything off the service manager, you know, at

the top text, we trust them and they already scheduled some with the customer. Then that's already done with that's. Awesome. Good.

MATT

54:04 Excellent. So here is that job we were just looking at in the office.

--- Assets ---

MATT

54:08 When I open this up as a technician, I'm gonna be presented with eight different tiles of information about the service, the equipment, you know, and I'll get to those in a little bit. But as you can see, the tech can be intentional about what they want to look at versus just hitting them in the face with every last detail about the job and the location.

--- Tech On-site ---

B.BARDIN

54:25 Interesting. Okay. I see here.

MATT

54:29 Back to these. But before we take a look at these down here at the bottom, you'll notice these clock events. So these are the things that are tied to that GPS snapshot. There's a few different ones to choose from. One of the popular ones is the in route. So when the technician is leaving his house, the office, the previous job, he can clock in route, ServiceTrade is gonna keep track of their drive time. Okay? Now, I said a very big part of our playbook is that amazon prime experience and this is where the technician can also notify the customer to let them know that they're on their way, so they can give them a friendly little eta.

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

MATT

55:07 And I just sent that to you guys. So if you have your e-mail on your phones or your computer, it's mobile friendly. You know, you get notified and it's gonna say, hey carry services in on the way it's at the top is your own logo branding. It's got a picture of the smiling technician and a description of what it is they're out there to do.

--- Customer engagement ---

MATT

55:26 Now, the key here is that's providing value for your customers. So they're not having to pick up the phone and call and ask where the technician is or when they can expect them. But it's also what we call a marketing impression. It's a way to get your branding stickier for your customers in a way that is not obnoxious or spanning because you're providing value, it's something they care about. It's very much what

amazon uber dominoes and Doordash is doing to keep their logo top of mind and differentiate themselves from the competition. So that's, a small example of that online customer engagement.

B.BARDIN

55:59 Okay. Quick question back on. They're gonna go in route. So you've assigned the work order to them.

--- Customer engagement ends ---

B.BARDIN

56:08 They have it on their device. Do E, do they have to respond that they received that? Because right now it, a, we send it in, what we call from the Jonas board, it, it's been sent out in mobile. Okay? Then then when they click on it, then we have it's a different color code, but it's at that point.

--- Tech On-site ---

B.BARDIN

56:32 They, a, we know that they received it. I guess with this, it's pretty much once you click their name, we know it's on their device, they don't have to.

MATT

56:41 Yeah, there's no receipt. Yep.

B.BARDIN

56:44 And so then they would go, okay, they're leaving the shop, they hit in route and they think it's gonna take 45 minutes to get here. They could put that in hit in route or they could put whatever time that gets sent to the customer. Now, when they get to the site to start working, they clock out.

MATT

57:06 Walk out service. Strait is gonna say, hey, you're ready to get to work. We say we sure are. And now we're clocked in on site and it's keeping track of all of our time at the location.

B.BARDIN

57:16 Yeah. And that site I, that's the GPS on site. It's tracking that.

MATT

57:22 Exactly. Yeah. And I'll show you back in the office. When we return to the work order, you can see the GPS snapshot how far away they were from the location, how much time they spend and it's all flowing back to, your ticket.

--- Dispatch ---

MATT

57:37 But man, there was one other thing I was gonna say, yeah, on the dispatch board, when your dispatchers looking at all the jobs, it's gonna have a little Progress line that correlates with the clock events. So I'm gonna be able to see a visual snapshot of how long they've been in route to this job. I'm gonna be able to see how long they were on site. And there's gonna be some other little visual indicators like a wrench when they find a repair. So there's little visual shortcuts where you have a snapshot of everything your technicians are doing. So you're not running blind the whole way, you know, waiting till eight o'clock at night for them to submit all the stuff that they do. You're very in TUNE with everything that's going on in real time.

--- Tech On-site ---

B.BARDIN

58:14 Okay. So they, they've been on site now for an hour and then they clock out or they fill out their paperwork. They get all that. One last thing they do is clock out and then it's... completed work order.

MATT

58:31 Yeah.

B.BARDIN

58:33 And then we could see that on the dispatch board at that point. And you... like if a wrench or something, if there was deficiencies found something, we...

--- Assets ---

MATT

58:44 Yeah, exactly. So let me fill out some of this work here. Like I said, a lot of these are self explanatory under services. This is where the technician can see that detailed description of what it is they're out there to work on, you know, the piece of equipment... they can get a more detailed view of those assets. And again, because the mobile app was built with simplicity in mind, I'm not looking at a list of all the 100 units that are at this location. I'm seeing a list of just the pieces of equipment that I'm concerned with for this one appointment.

MATT

59:25 Know the customer might pull me aside and say, hey, while I got you out here, do you mind looking at this other unit? Well, I'm still gonna be able to see all the pieces of equipment at the service sites.

MATT

59:41 And by the way, take your time if you're fielding a phone call or talking to a tech.

--- Assets ends ---

B.BARDIN

59:46 I got to send a text real quick. I'm...

MATT

59:49 Yeah, you do that.

B.BARDIN

1:00:05 And then we get two phones. You know, that's the new style isn't it, I mean, everybody's got to, I used to think one phone was bad... of course. I, I'm I mean, 48. And when we first started in the trade, I was electrician's helper and with my dad and... we didn't have phones and we got so much done on those job sites.

--- *Access to information* ---

B.BARDIN

1:00:38 And then, we went out and got us a phone putting our truck. And at that point, I, my job was when that horn, Hank to sprint to the truck and answer that phone before they hung up, you know, and we wouldn't it be nice to have a phone we could have in our pocket.

--- *Assets* ---

MATT

1:00:57 Yeah.

B.BARDIN

1:00:58 Now...

MATT

1:00:59 We're talking.

B.BARDIN

1:01:00 Yeah, that.

B.BARDIN

1:01:00 We've got two of them. I wishing we didn't have phones or what it is.

MATT

1:01:04 Yeah, I know it, we've come a long way from the little deeper. The little page is what... so you might have missed this, but really easy for me to recap from the technician, the assets. I'm just looking at the pieces of equipment that I'm concerned with for this appointment. So I'm not getting bombarded by too much information if the customer says, hey, can you look at one of these other 80 pieces of equipment while you're out here? I'm still gonna be able to see all that equipment, right?

B.BARDIN

1:01:29 Okay.

MATT

1:01:31 Now here's the big difference, right? For the technician say I'm standing in front of rooftop unit one, I don't have to look through a bunch of billing history. I don't have to call into the office because I open up this unit and I'm gonna be able to see all the different information, make model serial, all that I'm going to be able to see under service history, every past work order ever performed on this one unit at this one location and chronological order, right?

--- Deficiencies ---

MATT

1:01:58 So now I can open any of these work orders. I can see who would there, what they did, parts, they used, pictures, they took, deficiencies, they found. I can even see whether they captured a signature from the customer for the day. Okay? So all that information is at their fingertips both online and offline.

--- Customer engagement ---

MATT

1:02:15 Now, this tends to be huge for our customers and there's a lot of good reasons for it. But I'm kind of curious to know from you. What is the, what is the major advantage? You see that your technicians having easy to access detailed history, you know, to give them context on the unit that they're working on.

--- Customer engagement ends ---

B.BARDIN

1:02:32 Well, we just, you know, a lot of times we're out on site and somebody says, well, hey, we, I, you're gonna have to replace this, and they go, well, we, I, we didn't know anything about that. Well, then we get called in the office and we start doing our homework.

--- Assets ---

B.BARDIN

1:02:47 We start looking back at Northboundary to where we told them. Hey, your heat exchanger looks bad. It's going out or we, you know, this is maybe the customer does their own belts. You know, we have places like that. We do our own filters and builds and you tell them, hey, you're you know, have pictures of filters that need to be changed out. You all aren't doing your job on this. And then we get a call out for a froze up unit. And then they're there's a frustrated because it's just a dirty filter, you know? And so we do our part, you know, change the filter out and everything. And, you know, if the customer had that, you can say, hey, we were out here at this time, you all weren't changing the filter.

B.BARDIN

1:03:33 We got called back out, you know, six months later, we had the same deal. You know, you could just not that they need to defend it, but I think if that information was there, it would help them because they don't know in the field, they don't know what guy was there on the last ticket. And so it's you know, and then, you know, it's official to us just to, you know, just the more information we have, the better, so.

MATT

1:04:01 No, I love that. And honestly that's not one I get heard called out a lot but that's one of my favorites because you're absolutely right?

MATT

1:04:07 The technician is basically on the roof or in front of the customer feeling defenceless and helpless. They have to call back into the office because like you said, they got an angry customer telling them that you guys owe them something now instead of making that call and putting them in that position, they can say, well, hold on, mr customer.

MATT

1:04:21 Let me pull it up. Looks like the last time we're out here, we actually worked on these units. This is what we did. We haven't looked at this unit for, you know, eight months or so. Last time we did this is what we did. So now, instead of looking kinda sloppy and disorganized, you guys look like a well oiled well run operation that has their best interests in mine. So now you're inspiring their trust, and probably you're gonna get a lot fewer arguments or disputes like this down the road because they know you guys got it under a, you know, a tight rap.

B.BARDIN

1:04:49 Yeah. You were just out here to work on this and it ends up being, it wasn't that unit to something else. So, yeah, I could see where that'd be.

MATT

1:04:59 And then when you exit that point, sorry, go ahead.

B.BARDIN

1:05:04 JT just walked in but she can go back to when they're working on that equipment, which just a click. So like.

MATT

1:05:13 Now, I can see the different spects on the unit, but I can also see a chronological list of all past work orders ever performed on that one unit at that one location.

--- *Assets ends* ---

MATT

1:05:23 So I can open any of those up. So who's there? What they're doing pictures? They parts, they use, deficiencies, they found a, so the reason that this tends to also be big for our customers is when you don't have good visibility like this, you have what we call the phone rodeo. So if that technician is calling into the office for service history or they're calling even worse a fellow technician. Now, you've got two highly paid assets going down for the count while they do, this research, right? It only takes a handful of calls a day that add up over a week a month at the end of the year.

--- *Type of work* ---

MATT

1:05:57 You're potentially talking about tens of thousands of dollars in overhead just from lack of visibility on information like this. Yeah, savings, make sure...

B.BARDIN

1:06:06 Your preventative maintenance call that's just right there too. You could, you know we were here and did the preventative maintenance on that time and then we had a repair after it. You know, those guys would kind of know that or if we weren't...

--- *Deficiencies* ---

B.BARDIN

1:06:22 What about when you're doing maintenance and repair found during maintenance? So we find an efficiency, a contact or needs to be replaced and then go, hey, just get it done.

MATT

1:06:36 Yeah. So that's actually where I'm headed next is the part that I think you guys are gonna love there's. One thing that I want to show before that, and that's because it's kind of related service trade, makes it really easy for your technicians to document what they're finding and doing out there. And one of the ways they do that is through attachments, right? So, if I find a dent panel door on a unit and I want to document this to cya and show the customer. Hey, it was like this one we got here.

B.BARDIN

1:07:01 MM, HMM.

MATT

1:07:01 I'm not texting or emailing that picture. It's going right into the cloud. It's right to, the work order. It might be before and after pictures of a clean coil, but there's lots of ways that you can take a video. So it's really easy. Instead of that technician doing all that typing or writing, they can easily add pictures in media to it.

B.BARDIN

1:07:23 But that doesn't okay. Yeah. Sorry. Yeah, you're showing that for the deficiency that for purposes. Yeah.

MATT

1:07:31 Yeah, yeah. I'd like to show that first to say, hey, you don't just have to take, you know, log a deficiency to take pictures and stuff that technology is there for general job observations. But now, let's take a look at how that also streamlines the process for the technician because this is a very big aspect of your workflow. You want to make this as fast and easy for the technician. So I'm gonna take deficiencies. Let's say I'm working on rooftop unit three and I find a bad compressor. It's my favorite deficiency to find. I'm gonna add a deficiency. And now ServiceTrade is gonna spoon feed them a few simple steps to color this in step one. I just have to give it a name. I don't have to be terribly detailed here because you'll see there's other ways for me to add color.

--- Paper process ---

MATT

1:08:15 This is the big one. This is where we absolutely want to be taking us. Are you guys currently taking pictures of the deficiencies that you find out in field?

B.BARDIN

1:08:23 Yeah, we tried to. I mean, yeah, I think for the most part, we do and those guys are pretty used to doing that good, but it's just kind of saved on their phone.

--- Deficiencies ---

B.BARDIN

1:08:34 There's no way for us, you know, send it to really do now in Northboundary on the tasking they can do, you know, during PM, I found that... this, you know, compressor contact or is bark really needs to be replaced recommended on the tasking report, right? But.

MATT

1:09:00 Yeah. So it's kinda similar to that concept.

--- Deficiencies ends ---

MATT

1:09:05 But the big thing like you said, it's trapped on their phone when they take pictures. So it requires extra manual steps, maybe when they get home, when they're

closing out of their jobs and updating their statuses. Maybe that's when they're in texting or uploading or whatever with their pictures.

--- *Customer engagement* ---

MATT

1:09:17 The difference is this is all happening in real time which I'll show you here. But pictures are huge. Not only for the office, you guys can kind of be, you know, the technicians being your eyes, pictures are huge for approval ratings because when you start adding pictures to your quotes, it's going through.

--- *Deficiencies* ---

B.BARDIN

1:09:33 I got 300 percent.

MATT

1:09:35 Yeah. But another fan favorite for the technicians who are up on that 110 degree rooftop and are not in the mood to do a lot of writing or typing is an audio memo. So now I can say, hey, I just found a bad compressor. It's gonna take XYZ for parts. I already called the vendor. We'll be able to get these in tomorrow morning. I can pick these up and knock this out tomorrow. If we get an approval on this, it's gonna take xyz for time. We're gonna want Bob also on this job, whatever that narrative might look like. They can quickly capture all that information and keep on moving... next is gonna ask me the severity level. So note here, I'm not relying on the technician to word Smith their creative description for severity. I'm just selecting the three options we have here. So we'll say bad compressors and operable, it's gonna ask me to select the asset. Again. I'm not fingering in the serial number every time I go to tie this back to the asset. I know what asset I'm looking in front of and that is rooftop unit three. And then what's the status of this deficiency? Now, we got new fixed and verified. So this is new because we got a quote it, but let's say that your guy goes out and finds a bad capacitor, which is you got parts on the truck. It doesn't exceed the nte limit outlined in your maintenance contract and they're able to fix it right there without any approval. We still want to report this deficiency so we can tell the story to the content.

B.BARDIN

1:10:56 The is we just averted.

MATT

1:10:58 The, we want to get credit for this repair and this elimination of a future heading. Like I said, we'll call this new with those few simple steps in a couple of minutes or less. That technician has now successfully reported that deficiency and has passed the baton off to the office. So before we button this job up in the field, we're gonna pop back into the office. We're looking at that. Yeah. What's that?

B.BARDIN

1:11:23 Yeah, that's perfect. So I want to see what do we do with it now. Yeah, yeah.

MATT

1:11:27 Yeah, this is the fun part. So I can already see that we have a deficiency on this job, but I can do you one better. You can configure it in the ServiceTrade so that whoever is responsible for following up on this with a repair quote, whether it's a salesperson or a service manager, they'll get notified as soon as this deficiency was reported, they'll get an e-mail and it'll contain a link that brings them directly to the deficiency details. So, with a couple of minutes or less that technician took, we already know that we have been an operable, bad compressor founded the Roger Houston on rooftop unit three from this preventative maintenance job down below. I can see we already have the pictures in the audio memo to color in their observations. But because we're tracking asset by location, we can also see deficiency history and we can see things like related deficiencies, what other problems have happened on this unit that might warrant a deeper repair? Maybe we won't want to stop banddating it because it's something more.

B.BARDIN

1:12:26 Capacity, yeah. Okay. On that bad capacity for four months ago, did that get approved? Like did that get handled?

MATT

1:12:35 So... there wasn't a, there wasn't a proposed fix there. So, I don't see the status on it, but if I want to see... this deficiency, I can click on it and I can get more details on that.

B.BARDIN

1:12:50 Because if they didn't do it, then that could have caused this, right? But if they did do it, then you're like, okay, well, maybe that was never the issue.

MATT

1:12:59 Well, I will see the status. So I can see that they fixed the bad capacitor, right? But maybe this one is just verified. Maybe they never actually went through with the quote or we never actually dispatched the job out to go fix it. So it will update the status and the resolution of it. So you guys will have that context.

--- Deficiencies ends ---

MATT

1:13:19 Okay. Do we lose Brad?

B.BARDIN

1:13:21 Yeah, just for a second, but I still got it.

MATT

1:13:24 Okay. Because this is the fan part of, I do want them to see this.

B.BARDIN

1:13:28 Maybe hold on one second then.

B.BARDIN

1:14:12 It's the main guy one second, Matt, sir, the main guy?

MATT

1:14:17 Yeah. Take your time. Take your...

B.BARDIN

1:14:18 Time. Apparently, George is like...

B.BARDIN

1:14:22 Is always out here.

B.BARDIN

1:14:24 For something and then like didn't say it's smart off or I was just calling and Chase was like had is back. Chase is like you had 60 year old pie and this stuff out in the road but he didn't know Mike know about it.

--- Dispatch ---

B.BARDIN

1:14:37 So I think he should probably just get Mike called for you at the office. So I don't know if, you know Mike all.

B.BARDIN

1:14:45 Yeah, Mike, we've done some work for.

B.BARDIN

1:14:47 We have a busy. Yeah. Okay. Thanks, Matt. Sorry.

MATT

1:14:52 Yeah, no problem. No problem. So I'm notified right away this deficiency.

--- Quote templates ---

MATT

1:14:57 I have all the information that I need to go ahead and do up a quote and I got it in real time. So that technician is still out on that rooftop nose to the grindstone. I can already start on a quote here. Now, I can add this to an existing quote if I'm already working one up or I can create a brand new one, which is what I'm about to do here. I'll go ahead and give it an expiration date so we can track that.

<div align="center">B.BARDIN</div>

1:15:17 That's good idea. We don't really do that now.

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

1:15:22 So when I create this quote, I'm gonna have the ability to build this thing out from scratch, right? So this might be a unique repair, a unicorn of a situation, in which case, I can go ahead and word Smith a custom description here. I can go ahead and manually add my parts and pieces. But a lot of times you guys might be quoting out for relatively commonplace repairs, like bad compressors, right? And in those cases, you can create your own configurable templates and select those from a dropdown list. Now disclaimer these templates don't come with ServiceTrade. You wouldn't want them anyway. It is basically our sales team, copy and paste and stuff from google, but I'm gonna go ahead and grab my Goodman compressor replacement and it is going to prefill my scope of work and it's going to pre populate the items commonly associated with a repair of this type.

<div align="center">B.BARDIN</div>

1:16:11 So, can we, what if we didn't want to do so? Right now, we every one, is a customized one. Sure. And on that pricing thing below you had like a place where you could put items in for pricing?

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

1:16:28 Yeah, yeah. I like where you had.

<div align="center">B.BARDIN</div>

1:16:31 I pass that and I just put.

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

1:16:35 Yeah. Let me, let me talk you this and revisit that question because it might answer some of that. So I slapped this template on here which basically threw in the description and the parts that I'm expected to use, right? But if this isn't a 100 percent match every time, I'm 80 to 90 percent of the way there, I'm not building it from scratch every time. So if I want to click this pencil and edit some of the language, add some language. I can let's say I listen to that audio memo from the technician and they said, hey, this is gonna take four hours and not the usual three. Maybe they said, hey, it's also gonna involve some widgets there's. No repairs complete without one. So we'll throw a couple of those bad boys on there. Now here's, what I'll point out in ServiceTrade, you can house your standard parts cost. If that's something that you guys, it's not necessary. You can enter that as you go based on maybe what the technician said, they got from the vendor.

<div align="center">*--- ST app contracts and pricing ---*</div>

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

1:17:22 But the other thing that you can track is your customer specific pricing contracts. So ServiceTrade knows that anytime I'm doing a quote or an invoice for, the Roger in Houston, it already knows my markup rules for the contract that they've

signed, right? So I'm putting in the parts and the cost, it's automatically marking them up in accordance with that contract. But if I want to override that, I still can let's say that I'm looking for a target margin on here and I want to adjust some things to be more competitive or more profitable. I can do that. Did that address your question? JT?

B.BARDIN

1:17:59 I think so. Yeah. So that would do away with our worksheet altogether. Yeah, I think so. I don't know.

B.BARDIN

1:18:11 What if you had to put a crane in there?

MATT

1:18:14 You can do that? We might even have a demo?

B.BARDIN

1:18:19 Overhead grain rental. Okay. So then we'd have to, you can still customize the cost though, right?

MATT

1:18:27 Yeah, you can.

B.BARDIN

1:18:27 Go in your cost out there on the crane and say, instead of 289, it's actually 150 and then, we can set our own price on it.

--- Quote templates ---

B.BARDIN

1:18:38 Yeah, maybe it'd be helpful. I showed you what a worksheet looks like. But for us, but yeah, I assume. Okay.

MATT

1:18:45 Yeah. So the idea, I don't know how you have your worksheet set up, but we're very familiar with that process because a lot of people that's the best they really have to work with the idea here is, if you have customer specific pricing contracts, if it doesn't get you dead on what you're looking for, you can come back in here and tweak some of this stuff. So again, you can do it on like a one off basis. You're not starting from scratch every time with the pricing.

B.BARDIN

1:19:09 Okay. Here's an answer then. Could you, this could just be our worksheet, but could you just not show them all these line items?

MATT

1:19:15 100 percent.

B.BARDIN

1:19:16 Okay. All right. So.

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

MATT

1:19:18 Here, I can toggle the detail level. So where there's mystery there's margin, right? So maybe I want to go grand total every time, but I might have some customers like, you know, schools government customers that need me to break it down. It's a quick toggle. So I don't have to re, type up the entire quote.

--- Quote templates ---

B.BARDIN

1:19:34 It could be like labor and then all materials altogether or something. Yeah. Okay. Interesting. Yeah.

MATT

1:19:45 So, the idea here is again, that technician just reported that deficiency. I got notified right away. I slapped a template on there, made some fine TUNE changes and within minutes, I'm ready to fire this out to the customer.

--- Quote templates ends ---

B.BARDIN

1:19:57 That's pretty cool. I mean, you could have Chase in here doing the efficiency. I'll be call a, go talk to him a little bit about it maybe, but I have some notes in here from him. You shoot that out right now.

B.BARDIN

1:20:07 Yeah.

B.BARDIN

1:20:11 Well, just getting it in their hands quicker, you know, for approval. You know what I mean? As far as, because right now it's just kind of okay. That guy who is up? I, well, anyway, we've already gone over that. Yeah, do a.

B.BARDIN

1:20:23 On the work order, then we're getting it at eight o'clock or morning four 30. And then it's like, okay, then the next day rolls around, well, we needed, a price on, you know, we're catching it as we're re reading all these work orders coming in and this would be flagged as a deficiency, to get billed out. So a quote it.

MATT

1:20:44 And, and what are the, how high do, the probability go? Winning this business? If you get this within your customers hands within the hour that your technician found the deficiency all top of my mind.

B.BARDIN

1:20:56 Well, sometimes you, sometimes it's such a big deal that, you wanna take the physical proposal with you because we're starting in rural Texas. You know, we want to talk to that superintendent and say, hey, man, we really need to do this and this, it's been needing it for a while, but sometimes you do just want to e-mail it all either way.

MATT

1:21:14 100 percent. Well, now that we're ready to send this, we've got a few different options.

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

MATT

1:21:19 We know how powerful these pictures are for the quote approval rating and building trust, we definitely want to leave those in there. Let's say the audio memo, matt's, curson, like a sailor. He's discussing some sensitive pricing information. We can turn that off. Customer doesn't need to hear that Phil.

--- Quote templates ---

B.BARDIN

1:21:32 I...

MATT

1:21:33 Can do that. That's interesting. I can put in a custom description here if I want. I like to delete it just so it brings you guys right to, the quote. And then I'm gonna select my contact here and again, within minutes of that technician finding the deficiency. This quote is on its way to you guys. They're mobile friendly.

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

B.BARDIN

1:21:50 So we're the customer? Yeah.

MATT

1:21:54 You are, you're my favorite customer?

B.BARDIN

1:21:56 For repair and then you view and respond to that. Okay?

MATT

1:22:01 You go... and I'll pull up a full screen prego on my end. So you can see if you look like from a computer.

B.BARDIN

1:22:07 Yeah, that's exactly what I was going.

--- Quoting ---

B.BARDIN

1:22:09 Okay. Well, that's how it looks like from their desktop. Nice. I was gonna ask about that because it looks nice on the phone. But, okay. So if I hit, so he is approved. So what we run into is a lot of people just say e-mail back and say, yeah, this is approved or hey use po this for they on almost nobody signs them anymore and factor in, you know? So I hit approve there, it is there's, the po number? Okay? Let's see.

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

MATT

1:22:37 Yeah. And I wanna send you the Bill by the way. This is just an exercise.

B.BARDIN

1:22:41 I can think it confirms you have read and accept. Okay, there's some legal ramifications there. Okay? Check the box, okay?

MATT

1:22:49 So, we got another amazon prime market depression exposing them to your branding, differentiating you from the competition.

--- Quote templates ---

MATT

1:22:55 We went with the scope of work determined by the quote template. We see the asset that it was on. And we decided to go with a summary by line item type with a grand total. Customers got the pictures which they can print, save expand whatever they want to do.

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

MATT

1:23:10 We're building that trust. And then like you said, at the very bottom, it's your own legal jargon, okay? So that they hit to prove the only required field is they have to acknowledge your terms and conditions, which makes it a legally binding digital

signature. And then that's one of the first things you found with that big green money button right there. Okay? So.

--- Quoting ---

B.BARDIN

1:23:30 This and see what it looks like on yours.

MATT

1:23:33 Yeah. Did you accept it already?

B.BARDIN

1:23:36 Now, I'm there.

MATT

1:23:38 While you do, I'll point out there is no big red reject button and that is not an accident, right? So, a lot of times they might have one concern or question instead of throwing the baby out with the bath water. Their only recourse is to request changes which is gonna keep the conversation going. And then you guys can continue to negotiate and win that business.

B.BARDIN

1:23:59 And...

B.BARDIN

1:24:00 How about this? Does it go in a queue somewhere? So let's say that it's been sent? Is there a queue anywhere of pay deficiency or any kind of proposals we sent that we haven't heard back from because that's something huge that we don't even do it all. We don't at all. Do that is go back to the customer and say, hey, man, I sent you that last week. Did John, I want to do? No, we don't have the money for that. Okay? That's fine then, you know, but at least we got an answer. You know, we just leave all so much on the table. I think sometimes you the work.

MATT

1:24:30 Money on the table. If you're gonna take the time to send out a quote, the least you can do is follow up on it. But if you don't have the data or a good way to track it, then that's kind of status quo. And yes, we do have that. And I'm gonna show you it actually is a little fancier than that. I can see the status now is approved. Much the same way you, your salespeople, your service managers can get notified anytime a deficiency has been reported. They can also get notified anytime a customer is looking at the quote, anytime they've requested changes or anytime they've approved it because this is an online quote that never leaves your system. I get a nice digital audit trail of all the activity. So I can see all the steps taken to create it, who it was sent to and when I can see when they looked at it and I can see when they approve it.

B.BARDIN

1:25:18 Let us through that.

B.BARDIN

1:25:20 Because see, I looked at it, but I didn't do anything.

B.BARDIN

1:25:23 She is crazy here. So now.

MATT

1:25:27 To answer your question, JT, if I run one of the handy little quotes reports here and I show this to you earlier, Brad, I can use any of these filters to track my pipeline. So if I'm looking for, you know, let's say it's I'm Clint and I just want to see my pipeline that's all I'm looking at. Maybe I want to run a report by all quotes that have been sent and looked at, but they haven't done anything with it or maybe I want to see a report of all quotes that have been sent but haven't been looked at a.

B.BARDIN

1:25:56 An...

B.BARDIN

1:25:57 E-mail, yeah, we got the.

MATT

1:25:59 You send it to a contact that's no longer with the company instead of assuming that they're ghosting you and they're not interested. This gives you actionable intel to follow up in a timely manner. But I can do you one better. You can actually run that report and either make some phone calls, send them out one by one or you can actually bulk send all of these quotes back to your customers back to the top of their inbox back to top of mind. But wait there's more. You can even set up an automated recurring send so that you don't even have to manage this. It just continues to send to them every few days until it's either approved or denied.

B.BARDIN

1:26:40 Yeah. I mean, the idea is just right in front of us. We can, at least, I, even if it says picking up the phone, we've had this cost for 10 years and it's like, hey, did you get that one? No, I'm not gonna do it. Okay, fun and we take it off or how can we status it on our end? Maybe like customer denied or something?

MATT

1:26:55 Yes, absolutely. So if I, if this quote was still open, like if it went back to draft status, I'd have a reject button or an approved button. So if you got an old timer that just calls and said, hey, go go ahead with it. I can go ahead and approve it.

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

B.BARDIN

1:27:09 It to create a work order for us. Yeah, we want to prove it ourselves. Yeah, yeah, okay.

MATT

1:27:15 Yeah. But then you'll also notice once this is approved, these two new buttons pop up and allow us to take all this approved information service, detailed parts and all that stuff and transfer it to a brand new work order that's lock loaded and ready to go out to a tech nation.

--- *Access to information* ---

MATT

1:27:29 So, I'm not going to have to retype all this stuff up. I don't have to attach the pictures. It's all just gonna be a digital date that's ready to send out to attack?

B.BARDIN

1:27:38 What if they view it on their phone or their desktop? Can he, can they just like pull it out as a PDF because they got to take it to their board... back when I got it on my phone there. It is okay. Perfect. Yeah.

--- *Customer engagement* ---

MATT

1:27:55 So now, let me ask you this guys because it's all about numbers. It's about driving more revenue. It's not just about bells and whistles, not just about making your lives easier, although we hope to do that along the way. But now we've got a user friendly mobile app for our technicians that makes it really easy for them to document efficiencies and do it quickly. Can you see that leading to more pull-through pipeline funneling back to the office with better detail?

--- *Customer engagement ends* ---

B.BARDIN

1:28:19 There's no question. I mean, there's no question this would be better what we have, but let me do this. I mean, can we see the dispatch board maybe? Can you jump forward to that? Because that's what Brad does a lot with his service guys, and we'd like to see how that would work compared to be what we're working with. Now. Second question is later on is, have you ever had times where the clouds down and you can't you know, yeller down for a little bit?

MATT

1:28:51 Yeah. So we have what's called the four nines, we have up time of 99 point nine nine percent, which is pretty darn high. There's been occasional blips, and this is all hosted through amazon web services, which a.

B.BARDIN

1:29:06 Okay.

MATT

1:29:07 It's the biggest cloud in the word.

B.BARDIN

1:29:08 World. So you...

MATT

1:29:09 Benefit data, and all that. So, the downtime is almost not even memorable. I can't remember the last time it happened. And usually when it happens, it's super quick.

B.BARDIN

1:29:22 Well, there's a dispatch where it looks a lot like google calendar or something like that.

--- Tech On-site ---

MATT

1:29:27 Yeah. So this is the dispatch board and you can see here, this is the job that we just did. I can click on it to get more details. And by the way, I never completed this job, but I can see these little Progress marker. So I can see that I've been on site for 31 minutes when this job gets completed, which actually I wanted to show you that on the mobile app, but once it's completed, you'll see a green check mark on there showing that this technician is done for the day.

--- Dispatch ---

MATT

1:29:52 Okay? Now, if a customer is calling in, we're getting a service call, I can add a job directly from the dispatch board. So let's say that it is the kroger in Austin. I type in a few characters. It's gonna pull up the closest match. Once I select that customer is going to fill in the primary contact, the add information.

--- Assets ---

MATT

1:30:13 And now I can put in, you know, what type of call it is. I can say, you know, front of the... building is warm. This is me just typing what the customer is telling me. If, if the customer knows which piece of equipment is wrong, then I'm gonna be able to pull up a list of all their equipment at that service site. But a lot of times they may not. So the default will be the building. And then we know if it's heating and cooling, that it's the hvac service line. And then I might say something to the technician like diagnose repair and add asset while on site.

MATT

1:30:58 So now I don't need to know who this job is going to.

MATT

1:31:01 Maybe that phone is ringing off the hook, right? So I can just save this. And now I'm gonna be able to still access this job. When the phone finally stops ringing, I'm going to be able to see that in my available jobs here... right? And in my available jobs, this is where I can filter this stuff. So if I want to see, you know, different offices, you know, different service lines, all job types or maybe tags, I can use these filters to quickly drill down into my available jobs. So if I go job type... service call, for example.

MATT

1:31:44 This is where I'm gonna be able to access all of my service calls.

MATT

1:31:53 Okay.

MATT

1:32:00 There's the call that I just created. Now, I can scan where my technicians are, who's available. And I'm simply dragging and dropping this job down onto their calendar. If I think it's gonna take longer than that, I can even expand it a little bit given some more runway. But now, two things happen when I assign this job, one, it now shows up on their mobile device in real time, but two, they can automatically be notified, letting them know that they've had something added or removed from their schedule for the day.

MATT

1:32:33 And then this queue up here is whatever you guys want it to be. So, if there are certain jobs that are priority for you, and these are the ones that I want to focus on from, the group of jobs over here, I can easily drag these priorities whoops up into my queue so that they're more readily available.

B.BARDIN

1:32:53 His real quick, Matt, Brad, I think it does for us is that it eliminates it having to be Chase every moment and kind wants to work that towards that too. Is, if the job is put in, right then Jessica can kind of say, well, here's, what's next on the queue. There you go. Yeah, like there's no more like.

B.BARDIN

1:33:12 Yeah, no.

B.BARDIN

1:33:13 More waiting cost, will I do now? You know, we already have some that he's put in the queue to take, you know, it anyway. All right.

B.BARDIN

1:33:23 And as they come in, you could assign a technician like, hey, this needs to be, you know, you're taping?

B.BARDIN

1:33:30 This could be, you know, some.

B.BARDIN

1:33:33 Nice. You would already know that because of your customer top. Yeah.

MATT

1:33:39 Exactly. And you see how, you know, the real time visibility. You guys are no longer waiting until eight o'clock at night, you're seeing stuff literally come in live from the field. When it's completed, you can start reviewing it right there. You know, who's ready for the next job?

B.BARDIN

1:33:54 Okay. Now, here's my question. If that call we just made at kroger comes in at two o'clock it takes the guy till four o'clock and he's got to go back the next day. How do we move that to the next day to, is it manual moves to?

MATT

1:34:13 Yeah, I can create a new appointment on here. And to be honest, I'm not quick as add an additional appointment. And now I can select the following day.

B.BARDIN

1:34:27 Yeah. So then we just move it to the next day.

MATT

1:34:30 Yeah.

MATT

1:34:37 And so that's actually going to be.

B.BARDIN

1:34:42 Yeah.

B.BARDIN

1:34:43 That's...

MATT

1:34:43 Gonna be, it's gonna show up as like a separate block on here, but both of those appointments are going to funnel the same information back to the same work.

B.BARDIN

1:34:51 Okay. So we're just moving date on that one. Okay? Or if it gets scheduled out, can you set any reminders for that account? Like let's say your compressor was coming in three months to like a notification like in six weeks to call customer. Is that an option or so right?

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

MATT

1:35:16 Right now, there's not any necessarily like flags going off but all of that stuff is very searchable. So, for example, one of the filters that is coming to the dispatch board is there will actually be a parts order status on here where you can see like all parts received, all parts partially received. And then also in your main account.

--- *Quoting* ---

MATT

1:35:46 You're going to be able to run a jobs report based on part status as well.

B.BARDIN

1:35:51 Long lead times kinda can be avoided with just good customer service. You can't avoid the long lead times but the customer gets mad about it by just following up with.

B.BARDIN

1:36:03 Yeah. What? Right now, we don't ever call ahead and say, hey, customer real quick, your update, you know, you've got two more weeks left on this lead.

--- *Dispatch* ---

B.BARDIN

1:36:11 It's always them, you know, hey, what's ta, hey, what's cta? You know, it'd be nice to get out ahead of that. I think what Brad saying, yeah, absolutely. Yeah, be the ones calling them proactively. That would be sure. Cool.

MATT

1:36:25 Good customer service.

B.BARDIN

1:36:28 All right. Any.

MATT

1:36:31 The so.

<div style="text-align: center;">B.BARDIN</div>

_{1:36:33} Very good man.

<div style="text-align: center;">*--- Purchase decision ---*</div>

<div style="text-align: center;">B.BARDIN</div>

_{1:36:34} And this is probably kind of... getting to the point here where we're needing to move on. But I'll tell you Matt, this has really been awesome and you probably have some more. This is what my idea was today was to get another one of our top manager team involved. You know, I've seen, I've kind of done some research with you. I've talked to abandon you, and but now Brad is seen and Brad is working more day today with it anyway. So he's seen it. And now we can continue to kind of discuss within ourselves with mark and just what our next steps are, you know, moving forward, we're in the middle of building a new shop and, you know, it seems as if we're incredibly busy and it's just january.

<div style="text-align: center;">*--- Purchase decision ends ---*</div>

<div style="text-align: center;">B.BARDIN</div>

_{1:37:20} So we're kind of we're kind of wanting to get some, you know, plan. But... anyway, that's all I have to say. Man, I really do appreciate that. I'd like to say, you know, if you want to get Amanda to, I wanna get something back to you that's what I kind of started out talking with you.

<div style="text-align: center;">*--- Purchase decision ---*</div>

<div style="text-align: center;">B.BARDIN</div>

_{1:37:39} I didn't know a timeline. I know in sales. It's hard to, you know, invest a lot of time in us if I don't know when you're going to, you know, get it back. I don't have that unfortunately, but I really appreciate the time. I don't know what it would be. I really know, I mean there, but this gives us the information we need to now got our ownership and say, okay, what is the, you know, what's the thought on this? Just to be clear. So brad's understanding we would need to partner with someone in the back office payroll billing those kind of things right? And, and you guys have people you recommend, right? For that?

<div style="text-align: center;">MATT</div>

_{1:38:14} Yes. Yeah. So, and first of all, I appreciate the transparency that's kind of what I figured the plan was gonna be too. So there's no pressure. I want the timing to be right for you guys and you don't know what you don't know. So today, I was all about showing the straight. I also say if you look hard enough, there will never be the ideal time to implement a.

<div style="text-align: center;">*--- Accounting integrations ---*</div>

<div style="text-align: center;">B.BARDIN</div>

_{1:38:34} Yeah.

MATT

1:38:36 Ripping the band aid off as far as, the partnering with the back office. I would say about half of our customers in service trade as a standalone. They don't worry about integration and they get tons of ROI. It, it justifies any manual entry, which is what you guys would need for Jonas anyway. So, I would recommend not making the common mistake, that is easy for contractors to fall into and they think that they need to implement a new ERP system before they can start reaping the benefits and turbo charging their service department because I would recommend it in, sorry, it's a accounting system.

B.BARDIN

1:39:15 Okay.

MATT

1:39:15 Yeah. So you don't need to pull the plug on Jonas to make something like ServiceTrade where you're already doing a bunch of manual entry that's just a problem that'll be solved later on down the road. When you do swap out Jonas, if you decide to do it, which very well we'll likely find that when you get ServiceTrade in place, the time it's going to free up for you guys, the extra revenue that it's going to generate for you. You're not going to mind that double data entry, anything, right? So, it's not even something that you have to even do.

B.BARDIN

1:39:42 Utilize Jonas as the accounting software and club out of their operation modules, their front office, even though may be, we could discontinue, our service with E mobile and the dispatch board and all those things through Jonas and just use them for accounting. Okay? So.

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

B.BARDIN

1:40:03 Your work order software and stuff. Does, does that generate a po? So, what?

MATT

1:40:09 We have a po module that we didn't get into today, but yeah, it allows you guys to generate POS, tie them to jobs so that it's more efficient updating job costs. The other thing that we didn't get into is you, most of our customers actually Bill out of service rates.

--- Invoicing ---

MATT

1:40:25 So you can generate invoices based off of the work order, you Bill through service rates. You can get them out a lot faster. Allows your customers even pay their invoices online. If that's appealing to you because at the end of the day, all your accounting system really needs is high level ar, it needs to be tied to a certain cost code, needs payroll maybe and maybe some ap information.

MATT

1:40:45 But all that doesn't have to happen immediately in the moment. Most of your accounting and reporting is kind of happen end of the month looking back whereas you don't want to hang up your billing and your quoting, and, the delivery of your service based on the billing side, if that makes sense?

--- Recurring maintenance ---

B.BARDIN

1:41:01 I just thought one more question. What about like I have sweet water isd. And I a, I have multiple different relationships with that customer. So, for example, I have, a PM, I have a maintenance agreement on their chillers, and there's a chiller at every campus. Okay? And I have the maintenance agree with the main sweet water isd and that covers those chillers at the various campuses. And then I also have, I lease them ice machines and there's 24 of them all over the place at every different campus. So... I have on, so, our equipment rental, our least relationship is such that I Bill a monthly and I cover all the service and maintenance.

--- ST app contracts and pricing ---

B.BARDIN

1:41:49 So like on that billing code, it's gonna be zero. There is no charge or I just need to get it is machine fixed at our cost. But then if I'm doing something on there hvac, then that's gonna be a different relationship. Was, was there multiple tiers or I can have like I said, you kind of get what I'm trying to say or not really?

--- Recurring maintenance ---

MATT

1:42:09 I think I do. But are you still talking about billing... separately or proactively from the actual service ticket?

B.BARDIN

1:42:21 I'm I guess forget billing just the coding. So like sweet water it, but then I have a maintenance agreement and then I have an ice machine lease and I have a full coverage agreement.

--- Assets ---

B.BARDIN

1:42:31 I have multiple different relationships with that client that can all be put in there, maybe underneath subsections if you will or something, so that the office knows if they call about the chiller at the middle school that gets coded this way as part of the maintenance agreement. But if they call about the ice machine at the high

school, well, that gets coded over here differently. And it's I'm saying you put it on it's separate, okay?

MATT

1:42:59 You can put it on the asset, but you can also designate a certain pricing contract or service contract with a particular service. So each service will be associated with its own, can be associated with its own contract. So if you have a particular contract with the ice machine or the chiller, then the services you have associated with that piece of equipment that you're going out and performing, we'll have that agreement already tied to it.

--- Assets ends ---

B.BARDIN

1:43:23 Okay.

B.BARDIN

1:43:25 Yeah.

B.BARDIN

1:43:27 All right. Well, very good. Brand you everything else?

B.BARDIN

1:43:31 I do. I'm good. That was good information.

B.BARDIN

1:43:34 Yeah, you have brad's e-mail now. So save that in, but yes, let's just tell Amanda we need to follow up. She's follow up with me but we'll just keep in touch. You know, this is great. Give us information.

--- Purchase decision ---

B.BARDIN

1:43:50 You recorded that. Could you send me a copy of that? So I could, I might go back, and kind of watch that again too. Some of it. I would like to just kind of see, I might generate some more questions too. Of course.

MATT

1:44:02 Course, I'd be happy to, I'd be happy to. So what I, what I'll do, what it sounds like is I'll send you the recording and then, you know, for now, it sounds like I'll close out your file and we'll stay in touch. And then you guys let me know you built some traction internally. And then what I would recommend is, you know, if you get the whole team together, I'm happy to fly out there and spend half a day or more with you kind of doing a deep dive into some of the, you know, the workflows and the different products and stuff.

MATT

1:44:29 So you guys can give it a good honest look, but definitely you want to get the buy in from mark before, know that far?

B.BARDIN

1:44:35 For sure for sure. Yeah.

MATT

1:44:36 I think like.

B.BARDIN

1:44:37 All right.

MATT

1:44:41 Thank you guys. We keep having a great day.

B.BARDIN

1:44:43 Okay. You too. Thanks again.

The End