ServiceTrade Demo with B & I Contractors Inc

Joseph Summerell with B & I Contractors Inc
Recorded on 6/13/23 via Zoom, 1 hour 2 min.

Participants

ServiceTrade

Joseph Summerell
Field Manager

B & I Contractors Inc

Jason Walker
Service Department Manager

Topics

Transcript

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

JASON

0:03 Hey, what's going on?

JOSEPH

0:05 Everything, Jason, how you doing this morning?

JASON

0:08 I hear that doing good.

JOSEPH

0:12 Stay above water.

JASON

0:14 Try.

JOSEPH

0:16 Succeeding or not?

JASON

0:18 No... no, but that's pretty typical anymore. It seems like.

JOSEPH

0:24 Yeah, I hear you. Everybody's just been so swamped. I mean, ever since COVID happened, I don't think anything's led up. It's crazy.

--- Paper process ---

JASON

0:31 No lead times and things are getting better. I wanna say they're back to normal, but we can get vehicles for new tack. We can get equipment for projects. So, I mean, some of that stuff is lightning up but it's still, you know, manpower wise. I think half the workforce is work in comparison to what it was. Nobody wants to work full time. Nobody wants to work out of the house just.

--- Paper process ends ---

JOSEPH

1:00 Yeah, the demand is not letting up and, the labor can't keep up with it either.

JASON

1:06 Right.

JOSEPH

1:07 I guess kind of a pretty great transition because that's a lot of what we're focused on as a company right now is, hey, how do we help you do more with less?

--- Paper process ---

JOSEPH

1:16 How do we keep, the technicians busy in the field as much as possible? Because, I mean, yeah, hiring an office person isn't that easy either, but it's easier than finding a new technician. So we, how do we put more potentially on the back office if we need to in order to make the text as efficient as possible?

--- Paper process ends ---

JOSEPH

1:39 And then how do we maximize KPI'S like profit per labor hour? And things like that? Because in the end, that's your most valuable resources, those technicians in the field.

JASON

1:51 Definitely.

JOSEPH

1:52 But we'll get more into that. Well. I appreciate you joining me. I guess we talked a couple of times now, but I'm Jay, I cover all the southeast for service trade.

JASON

2:03 I'll be.

JOSEPH

2:04 Your guy as you take a look at us, and really what I had planned out for us for today is to give you some background on who we are as a company. Then we'll dive into, the software itself, walk you through. Hey, once things come out of Northboundary, this is how they land in service trade. This is the rest of what you would need to kind of build out for that customer before delivering on a job. And then we can walkthrough a quick job. And then as a sales guy, I wanna make sure that we take a look at some reporting because I know that kind of stuff is probably pretty important to you to understand. Hey, how are my contracts do, how rates things like that? So I'll go ahead and share my screen and we can get into it. Can you see here with the old fashioned gauges?

JASON

2:52 Yeah, orange dash?

JOSEPH

2:55 Yeah, that's all right. This guy is actually a tech here in Raleigh. I saw him the other day driving his Van, and I'd never met him but, I was on the interstate and I saw a blue hat Van and I said, I know that's a customer and I pulled up beside it and it was that guy and I was like at my slides.

JASON

3:12 That's fine.

JOSEPH

3:15 All right. So, yeah. Like we, like I said, we're gonna talk through the service trade difference who we are as a company. Then we talk next steps. Really what we found as a company, we've been in business now for over 10 years working specifically with commercial and industrial contractors and the mechanical like mep space, and the fire and life safety space.

--- *Type of work* ---

JOSEPH

3:36 So we really found our niche in companies doing service work for commercial industrial clients that do a lot of recurring maintenance and try and drive pull through revenue that's what we do best. And of course, we handle, the emergency work and we handle small projects, things like that. We don't really get into a billing and multi year projects. But if it's a RT swap out or a little retrofit, a lot of the times the service departments doing that anyway. So, we expanded our capabilities over the past few years, to be able to handle that.

JASON

4:10 Can you, can you Progress Bill?

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

JASON

4:12 I mean, not necessarily Aia documents, but can you do more than, you know, like say you've got two cooling towers you replace? And so it's an in and out job, but we want to build for the equipment because it's 300,000 dollars worth of towers. Can you, can you, do you show me now? I'm just asking?

JOSEPH

4:37 Yeah. So I'm just looking over here, getting my notes together and making sure I type this in, but yes, sir, we can do that so you can send multiple bills for the same work order essentially.

JASON

4:47 Yeah.

JOSEPH

4:47 So, if you want to Progress Bill, you can say, hey, I'm going to do a deposit or, hey, I'm gonna Bill for the two or to use. And then I'll Bill for everything else later and you can send 50 invoices underneath one job if you want to job or work order. I'll use those terms interchangeably.

JASON

5:03 Okay.

JOSEPH

5:08 And so what we found when you're trying to grow the profitability of a company like all, there's two real schools with thought to do it.

--- Customer engagement ---

JOSEPH

5:15 You can either control costs, better be better about making sure that nothing's slipping through the cracks and you can grow quality revenue. So we'll kinda walkthrough how we help with both of these. I will say, yes, we can control costs to a certain extent. That is a focus of ours.

--- Customer engagement ends ---

JOSEPH

5:30 But our main focus is growing that quality revenue because you can only control costs so much. You can always just keep growing revenue, keep raising your margins, keep working with better customers and keep growing the business that way. And in today's day and age, if you can fire the bottom 10, 15 percent of your customers every year. The ones who are paying has to work with and then double down on your bigger customers. Are your better customers and keep doing more work with them. That's how we found our clients are growing revenue without growing technicians or customers really.

JASON

6:02 Yeah. Talk about every Tuesday in the managers meeting that we can't believe we're at the point of we're firing customers, our whole careers has been about, growing and.

--- Type of work ---

JOSEPH

6:17 You all already doing that? That's great.

JASON

6:19 Yeah.

JOSEPH

6:20 What, what sectors are you all focused on for your customer base?

JASON

6:26 Heavy heavy healthcare churches schools.

JOSEPH

6:31 Okay.

JASON

6:32 You know, we try to stay out of the high rises. Some of, the property managers and high rises is pretty cut throat, but, we really look at, the more complex nice systems because you can charge more or less competition.

JOSEPH

6:49 Yeah, for sure. Yeah, it's what a lot of our clients are focused on as well, the especially the healthcare ones because those, as long as you're communicating well and you can get in there and do what you need to do. They, they can't have downtime in those facilities.

--- Type of work ends ---

JOSEPH

7:06 They'll pay whatever in whatever they need, to make sure that they're taken care of. So I'm gonna walk through this quick wheel to illustrate kind of what it is that service trade. Does we have a big focus on the office coordination. Let's get everything done that we possibly can on the front end to make everything work smoothly out in the field. So we've got pretty simple scheduling and dispatching with maps so that you can make the most of a trip, say if you're in like here, if I'm in greensborough and I need to send somebody over to rally over here, I might as well look and make sure there's nothing thing else that they can pick up on the way so that when, they can make the most of that truck role.

--- ST app contracts and pricing ---

JOSEPH

7:43 And then we have super simple like job cost reporting. So you can create budgets and kind of track how you're doing to that budget, whether it's, a service call or a swap out or a larger project. We created this more for projects, but our companies, our clients are using this for even like large PMS just to make sure that they are delivering it in a way that is.

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

JASON

8:08 Yes, making money. PMS are a huge and the way vista works which you may well know, you have a service agreement number that doesn't tell you Dick?

JOSEPH

8:18 Because all the...

JASON

8:19 Cost is in the work orders that are opened as trips in the service schedule of the agreement. So it's really hard to tell along the way throughout the fiscal year. Am I doing okay or not without sitting there and creating an excel spreadsheet manually typing all this in?

--- ST app contracts and pricing ---

JOSEPH

8:40 So, you could only see that at the contract level, not the job level?

JASON

8:43 So, yeah, because the billing is at the contract level, the is at the work order level. So you have to go get each individual work order, write all that out in an excel spreadsheet and then figure out, okay, we've done two bills so far.

--- Pricing ---

JASON

9:01 We've incurred this much cost, fiscal year to date. We're at, you know, 80 percent of the cost and 100 percent of the billing, you know, for the year and we got two visits left. So what the hell's going on?

JOSEPH

9:15 Yeah. Not only looking retrospectively at it, but once you get pretty sophisticated with it, you can start to look forward at it and be like, all right, how many man hours am I gonna need for my PMS in August?

--- Pricing ends ---

JOSEPH

9:27 Really start to plan that out? Because, if I don't have the man hours now, man, I'd better call my recruiters and get somebody another guy or two in to help with those.

JASON

9:35 You can, you can very quickly and easily should be able to look at what your service agreement, our requirement is for the month, what your historic... service call is for the month and get a quick manpower projection that you're good to go or your screw one of the two, you know?

JOSEPH

9:56 You all do that now?

JASON

9:57 No.

JOSEPH

9:58 Okay. No, that's what we find with that's what we find with a lot of these older legacy accounting systems is they're solid at accounting and they're great for the big jobs. But when it comes to the more high speed service workflows, that just took a back seat, and nobody really cared during the development, they just said you need a work order. We can do that check. But that's it's so much more than that. So that's really the niche that service trade has filled for our clients over the past 10 years is creating a dedicated service platform that can then just pipe financial data over into accounting.

--- *Assets* ---

JASON

10:36 Right.

JOSEPH

10:39 So the next thing we're focused on is technician productivity. This is super simple. We just have an easy mobile app that has all the information they should need about services and history and pictures, and any sort of manuals, that sort of stuff. Because the last thing we want them to do have to do is to call back to the office and wait for somebody to tell them what happened last year, that sort of thing.

--- *Assets ends* ---

JOSEPH

10:59 And I'll walk you through that here. In a second. We also have a big focus on customer communication. So you might have seen this come through last night. I sent you a thing called a service link that kinda serves as an appointment reminder that will update live while we go through this job today. So when I take a picture or I add a piece of paperwork or something like that, it will start to flow in there. And then when it's when the job is complete, our clients typically send that out again to say, hey, we're done. This is what we did.

--- Customer engagement ---

JOSEPH

11:28 This is all the information about what we did. And then on top of that, we have a customer portal that we can embed into your website so that your larger clients can go in and they can see, hey, these are all my jobs coming up. These are all that's been recently completed. I can pay this Bill. I can approve this quote or I can even request service through there. So we're trying to make it.

JASON

11:49 Is that functional fully functional? The customer portal? So I've had two different software companies tell me, hey, we've got this customer portal that's the best thing and then you implement the software to find out, yeah, their customer portal doesn't quite work yet or function.

--- Customer engagement ends ---

JOSEPH

12:08 It is fully functional. We have plenty of folks using it. It's just a Wordpress plugin. So plugs right in and, I can show it to you today. It's an actual website that we have connected to our demo account. So yeah, it works. It works well.

JASON

12:24 Okay.

JOSEPH

12:27 But really this is one of the main things that we're focused on to because the easier we can make it to do business with you all the more likely people are to do it.

--- Paper process ---

JOSEPH

12:35 And especially as folks that are millennials kinda get into the roles where they're managing some of this stuff for your clients, property managers, or facility managers, that sort of thing. Us millennials, we don't like to pick up the phone and call people to get something done. We like to just do a couple of clicks and we're good.

--- Customer engagement ---

JOSEPH

12:57 Once all the work is completed, management visibility is huge. So we have some reporting tools where we can pull data from the back side of service trade and show you a lot of cool KPI'S that aren't just around the financials but around the revenue generation side of the business. So like here is jobs with deficiencies, found a repair opportunities found. Hey, how many of my jobs are my technicians, finding those repair opportunities of that? How many are being quoted out? And of those that have been quoted out, what's my quote approval rate? Really things like that can really help you drill down into what is driving that high margin repair work in the business.

--- Customer engagement ends ---

JOSEPH

13:36 So you can double down on it or see which technicians are actually reporting those opportunities and which ones aren't because if Jimmy is reporting them on 60 percent of his jobs and Tim's reporting them on 10, there's a discrepancy there. And either Jimmy's doing too much or Tim's doing too little. And we got to figure out which one's which.

JASON

13:54 Right.

JOSEPH

13:57 Any questions on that?

JASON

13:59 So, you can use that for sales too, I'm guessing.

JOSEPH

14:06 Yep, sales operations, and then also financial stuff can be piped into there generally as well.

JASON

14:13 So, so does that pull from the Northboundary piece for the service sales? Or would the reporting for the sales still be within Northboundary reports?

JOSEPH

14:24 The basic reporting for the sales would still be in the Northboundary reports. Now, we should be able to pull if you want to have kind of a holistic dashboard for the whole company, we should be able to pipe data over from Northboundary into this. I don't know the extent to which we can do that because it's still.

--- Implementation and ongoing support ---

JASON

14:41 Well, what I'm thinking, is for the sales manager to here's my sales team and have a quick dashboard of here's where everybody's at fiscal year to date to plan. See what I'm saying. So you'd have a dashboard on that, and then if you needed to, you could drill in the Northboundary for deeper, but just a broad dashboard overview of the sales team, how they're doing?

--- Implementation and ongoing support ends ---

JOSEPH

15:06 Northboundary, you already have that exact dashboard.

JASON

15:11 Yeah. Kinda, the main, let me see if I can. So the dashboard is we'll bring up, your individual people, the closure rate and all that. So it.

JOSEPH

15:35 You can put like, a quota number in there for the year, track them to go.

JASON

15:43 Yeah, but that doesn't unless I don't have it set up, right? So I don't have, I don't have how they're doing to plan. I have their closure rates, but, I haven't ever seen, wait a minute here's. A forecast thing. It's all probabilities.

JOSEPH

16:00 You should be able to track how they're doing the plan. I don't know how to do it, but I have seen it. So I can get you some details on that. I'll jot that down as a note to follow up on.

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

JASON

16:18 Okay.

JOSEPH

16:22 Then this is also great. I'll show you once we get into that, not just a screenshot of it but the actual reporting tool contracts are super cool to kinda drill into here because I can look at the contract as a whole and then just a click a button and it expands it to the different job types, and then expand it to the different jobs.

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

JOSEPH

16:39 And you can really drill down quickly into the everything that's going on in the business. And then the last thing on this wheel is sales success. So especially for our clients, focusing on all the maintenance contracts that pull through revenue is critical. So we have the Northboundary that really help with the new business sales.

--- *Customer engagement* ---

JOSEPH

17:00 Then within service trade, we have some quoting capabilities that are pretty slick in the way they route repair opportunities from the field back to the office to be quoted out and get it back in front of the customer. And an easy to consume way with pictures and videos, and easy to approve just one click to approve button sorta thing.

--- Customer engagement ends ---

JOSEPH

17:20 So... like I said, we've been in business now for over 10 years. We have over 1,200 active accounts specifically in fire and mechanical industries doing commercial and industrial work. And this is the stat that really kind of blew me away when they threw it at us about six months ago.

--- Type of work ---

JOSEPH

17:39 Over 10 percent of commercial and industrial buildings in the us have been service by service trade contractor. I didn't think it'd be that many, but that was that's pretty wild.

JASON

17:48 You've been in business 10 years and you cover 10 percent of the commercial industrial buildings, in the us.

--- Type of work ends ---

JOSEPH

17:57 A service trade contractor has worked, at least, has done work at 10 percent of the building.

JASON

18:03 Okay. Do you have a slide of some of the contractors? Or maybe you already did?

JOSEPH

18:11 I can put, I can put one together. I do not have that pulled up right now though, but I mean, we work with companies from five technicians all the way up to eight 900, I think is about our largest. So... let's jump over to service trade itself. And I can kinda walk you through the structure of how our data set up and then how the information comes over from Northboundary. So ServiceTrade is a web app. You go to ap dot, ServiceTrade, dot com, log in with your email address and password, and you're in your specific user account.

--- Recurring maintenance ---

JOSEPH

18:49 Every user has their own log in. So here I am at a customer page and I can pop that open and see all the different locations underneath this customer. And then I'll click on cosco here in south Miami. And then this is my location page. At the location level.

--- Assets ---

JOSEPH

19:06 I've got this different, this accordion of information that will open up. So once opportunity is closed one out of Northboundary, it can pull the location and customer information over. And then it can also pull the assets over. So things like make model, serial number, belt sizes, quantities, that sort of stuff that can come over from Northboundary. And then we'll track those and service trade now and track the jobs that have been done to it. So if I open up this RTU number one here... of course, I can see my make model and serial number right here. But then I can also see what jobs have been done on this piece of equipment. So if I'm doing trying to make a good repair versus replace recommendation for my client, I can come in here, look at that asset and then also see all the invoices that have been generated for that. So it really breaks it down for you automatically.

JASON

20:06 So is there, does the technician see this on the, on his phone too?

JOSEPH

20:13 The history, yes, the invoice details now, well, you could turn it on. I can see it because I have an admin account, but all that's permissions based, right? But the history absolutely that's critical for the.

JASON

20:26 Okay.

JOSEPH

20:27 And in the field.

JASON

20:27 Flows into vista.

JOSEPH

20:30 The financial stuff. Yeah, the, all the nitty gritty asset details and all that. And.

--- Invoicing ---

JASON

20:37 Yeah, right. But the work order that's assigned will be the work order and vista and all the cost and invoicing amounts will follow.

JOSEPH

20:50 I'll have to double check on the exact format that it comes into vista. Most of our accounting integrations just push it over as, a invoice.

--- Recurring maintenance ---

JOSEPH

20:59 And then the job and all the job details stay in service trade. Okay? All right. We'll also keep up with I'm gonna go back to this location page collapse that down. We can have recurring invoices. So if you have a client that gets billed monthly or quarterly or whatever quarterly services, we can handle that you have your different contracts.

--- ST app contracts and pricing ---

JOSEPH

21:26 So the different contract mark up rules for this specific location and type of job, I can say, hey, all of the maintenance jobs get this mark up at this location. All the repair jobs get this mark up and then break that down. And really specifically. And then within those contracts, any job that's created at costco that's a repair can flow underneath that. And then I can track my margins holistically underneath that contract.

--- Recurring maintenance ---

JOSEPH

21:58 So, once the asset comes over you right now, the service intervals do not pipe over from Northboundary, but that is something that we're working on. I don't have a time frame on when it's going to be done yet, but once that happens, that will be really slit because then it'll understand, hey, we gotta do a quarterly out here. This is my estimated price and duration and then it's tied to RT number one. I can also have a preferred technician on these services. So that, hey, the, this is the guy I want to go out there every single time. And then they'll have the window in which I need to get it done.

--- Assets ---

JOSEPH

22:32 So right now, that's something that you'd have to just, you can have it templatized so you can just add the template to it and you're good to go. But eventually that will just pipe on over.

JASON

22:43 But you could have, I mean not by a piece of equipment with dollar amount, you could have a location that has 20 rooftops and then the total amount for that like this is broken down each piece of equipment. It looks.

JOSEPH

23:01 Yes, sir. So we have clients that do it both ways. We can create parent and child assets. So you can say, hey, this is a group of rooftop units that I want to create a service for together and then have all the different individual assets underneath it. The value in doing it this way is when I click on RT number one, I can then see all the, how much it's cost to deliver the services for that specific unit. And then as the technician is going through, they can check off. Hey, I did the PM on this one. I did the PM on RT number two. I did the PM on RTU, number three rather than just altogether, but you can choose how you wanna do it.

JASON

23:47 Well, I'm just thinking we get into some places we'll have 217 fancy units. You're not gonna. You're not gonna add it take you forever to make the entry into service trading.

--- *Accounting* ---

JOSEPH

24:01 Well, that the entry of all the different units is something that is done via either bulk import or piped over from Northboundary. So if it's in there then...

JASON

24:11 It wouldn't be in Northboundary, I'd be.

JOSEPH

24:15 Okay. Is it exportable out of vista?

JASON

24:19 I don't know that.

JOSEPH

24:21 Okay. Well, regardless, yeah, you could just do it.

--- *Assets* ---

JOSEPH

24:25 Hey, this is the location. We have 230 units out there. We're good and just keep it. Keep it high level if you want to.

JASON

24:38 Okay.

JOSEPH

24:40 Go let's see anything else on this job page I need to cover? I don't think so. We'll come back to deficiencies and quotes that will just list out the quotes for that location.

--- Recurring maintenance ---

JOSEPH

24:54 But I built out this PM job for us to look at today at cosco and south Miami. So I have it separated out. So I have three different services, two of which are on RT, use, one is on a refrigeration system and these are recurring so that it'll automate tactically understand the parts and labor that I should have with this service every time I do it.

--- Access to information ---

JOSEPH

25:18 So that will automatically pipe into, the work order itself. And then I will slide over to my phone here and we can walk through a couple of things on the work order. So I'm actually on my phone just got it mirrored to my laptop, but this is what the technician would be seeing for their work order.

--- Tech On-site ---

JOSEPH

25:37 I clocked in that I was in route and sent you a notification straight from the mobile app here. I don't know if you saw that with me and the ski mask...

JASON

25:46 I saw your too. I didn't see the ski... mass.

JOSEPH

25:53 With or mark services as.

JASON

25:55 Yeah, yup. Yup. I see it.

JOSEPH

25:58 That's me. That just be the way your technicians could tell your clients when they're showing up.

JASON

26:03 Okay.

JOSEPH

26:05 Now, when you get on site, you just clock in that you're on site and this will turn green down at the bottom, start tracking on site time. It'll also do a GPS snapshot of wherever they are when those clock events happen so that if they are 20 Miles from where they're supposed to be, it'll flag that for you.

--- Deficiencies ---

JOSEPH

26:20 We did a lot to make this as intuitive as possible. So the services will be, hey, what do we need to do today? You can just click into those tiles and see exactly what it is that we're taking care of. Attachments are self explanatory pictures, videos, audio memos can be put in there.

--- Quote templates ---

JOSEPH

26:37 PDF can be put in there, things like that. So that all that is in one spot. If the technician needs to add parts or labor to the job, they can do that. And I can go in here and add a part. Let's say I'll add a widget to this job.

--- Parts management (inventory) ---

JOSEPH

26:52 To today. I can click on the widget. And then if there's a cost, actually, generally the cost is hidden from technicians. Unless they have the capability, what they are concerned with is where it's coming from. So if it's coming from one of their trucks, they can click on warehouse and then select the warehouse that it came from, trades, truck, main, warehouse, that sort of thing.

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

JOSEPH

27:15 So you can track where these parts are coming from, as well as if it's coming from a vendor. I can then track which vendor it's coming from the po number that's associated with, the status of that part to say, hey, it's ordered or received that sort of thing. So then back in the office, I have good reporting to say, all right, if it's been ordered, not yet received, but it's overdue for delivery. Let me see all those jobs. So I can follow up with my vendor, that sort of thing.

JASON

27:41 Okay.

JOSEPH

27:44 Any questions on that? No... what would really concern I guess you and driving sales is this deficiencies tab in the top, right?

--- Assets ---

JOSEPH

27:55 Actually, I want to touch on assets before I go there assets here in the bottom, that is going to be the equipment that I'm working on site. So this is where the technician would be able to see the history of what they're working on. So if I click on RT number one, I can see my make model serial number, all that. I can see attachments for this specific unit. So if I have a repair manual, PDF or something like that, I can tie it to the asset and it's there forever. Comments. Those get tied to the asset deficiencies are going to be any issues that have been found on this piece of equipment. I can click into that and see, hey, we've had some bad compressors out here recently. I should probably check on that compressor. And then if I just need to look at the service history as a whole, I can click on that and I can go and look at all my old jobs. I've got a couple of unscheduled ones here. But those are all the old work orders or jobs that are specifically for or to number one. They're not looking back at the whole location, they can get to the information they need to generally pretty quick. Any questions there?

JASON

28:59 No recently.

--- Access to information ---

JOSEPH

29:01 Thank you technicians would like that.

JASON

29:03 Yeah. I mean bouncing between field connect and field service. They lost some functionality of some no pads that they could write notes to each other as far as boiler door code, you know... notes on where extra filters are stored, things like that, where when they, when vista rolled out field service and we migrated to that to keep it all. Vista... we didn't know we were gonna lose some functionality that the text really used.

--- Deficiencies ---

JOSEPH

29:39 Yeah. We found that like if I go in here and I wanted to, I could make a comment about those things and type it out. Could use voice to text. Excuse me or I could go in here and just record an audio memo. And as the technician, they generally like this the best because they can just talk it out and tell everybody exactly what they're doing out here. Just, they don't have to slow down and actually type it and then go back and adjust the talk to text because that never gets it 100 percent, right?

JASON

30:12 Yep.

JOSEPH

30:13 All right. So let's go back and we'll take a look at the deficiencies tab. This is where if the technician sees any sort of repair opportunities, this is where they can document that. So if I click on deficiencies, it shows me all the ones that are open at the location and I can add one at the bottom. So I'll do my usual bad compressor. I can add attachments to it and we generally recommend doing that so that you can one share the office. Hey, this is what's going on out here. Two, it's great to show the customer. Hey, this is what it is that you need to fix. You can also take a video and record an audio memo here to say, hey, Jason, I'm out at this location. Take a listen to the way this unit sounding something's not right here. I think we need to replace the compressor.

JASON

31:02 Right.

JOSEPH

31:05 Gets as much information back to the office for the person quoting as we possibly can. So beneath that you have a severity setting. So I can say, hey, this is in operable or, hey, this is just suggested. This will probably be an issue in the next six months, but it's really nothing we need to quote out yet, I just want to communicate it to the customer that way. Eventually you kinda start to train your customers of, hey, we're gonna tell you whenever we see things that are going to be a problem, so that in six months, when we send you a quote, it's not a surprise. I'll say this one's inoperable. I'll tie it to the actual asset that I'm working on. And then I can put a status on it of new, that service line should come in automatically, but I'll just put hvac on there. All right. So when I click save here as a technician, I'm onto my next thing and that triggers an email notification back to the office to whoever you need it routed to say, hey, this problem was found needs to be quoted out, get working on that.

JASON

32:11 So it does that by email or notification within the system?

JOSEPH

32:16 It does it via email, but then you also have not like reporting in the system to where you can run a report to say, hey show me all the deficiencies found today or show me all the ones that were found this week that have not yet been quoted out as a sales manager, I need to figure out why these have not yet been quoted out.

--- Forms ---

JASON

32:35 Right.

JOSEPH

32:37 And if you'll use teams or slack or something like that, you can also route those notifications into a system like that.

JOSEPH

32:50 And the last thing in here is paperwork. You can put fill able PDFS in here with smart rules so that information can automatically fill in from service trade like address, make model serial number, that sort of stuff.

--- Tech On-site ---

JOSEPH

33:02 So, it's a simple check box for your technician to go through a tasking sheet. Do you, I'll capture a customer signature when you're finishing up on a job?

JASON

33:13 We have the capability to, I don't know that they really do, okay.

JOSEPH

33:21 The value of it in service rate is we create a work acknowledgement. So I can just click on a contact, click on you. And then I'll click review. This is where I can talk to the customer through what we did, show them the deficiency that we found. They can acknowledge the work has been completed as described. I'll click next and then sign that will flatten that into a PDF and then send it over to the customer automatically just to say, hey, this is what we did. It's kinda like immediate gratification of, hey, they left. I know they were here and I have the proof that they were here and what they did, the Bill comes later.

JASON

33:57 So that's just the field service report.

JOSEPH

34:01 That's correct?

JASON

34:03 And that happens on service calls, service repair work, PM, contract work, each visit, you get it signed, it'll send the information for that visit.

--- Invoicing ---

JOSEPH

34:15 That's exactly right. And if you don't wanna do it, you don't have to do it, but that's kinda up to you. All it's...

JASON

34:20 Like it, it's just the invoice is tied to it. So a lot of times you either get a real shit document with nothing on it because it's not ready invoice yet or it'll come with the invoice which is after when they want it. So.

--- Tech On-site ---

JOSEPH

34:35 Right. Yeah. So, this is just for the, just for the appointment. And then you say if you have multiple appointments on the same job, multiple visits, you can capture multiple signatures. And then if it does or it can be attached to the invoice when that is sent because it can be really useful if the person paying the Bill is not on site and they need to see a onsite customer signature before they pay the Bill. It's right there for them.

JASON

35:05 Right.

JOSEPH

35:08 All right. So, is there anything else we need to check out in this mobile app? Any functionality you can think of before I clock out, we go back to the office?

JASON

35:16 No.

JOSEPH

35:17 So I'll clock out. It'll say, hey, did you complete the three PMS that you came to do?

--- *Dispatch* ---

JOSEPH

35:23 If you haven't broken down by asset? I'll do three of them if you want. It just compressed altogether. They can just say, yes, I did everything and I'll click next. And I am done with this visit. So I'm clocked out.

JASON

35:35 So, when they say they're done, does it reflect on the dispatch board that they change a different color showing their done checked out or anything like that or?

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

JOSEPH

35:48 Exactly, right. Yes, sir. It'll show that they are clocked out and the appointment is or, the service is complete. So these services and on the office side just updated to show complete here.

JASON

36:03 Okay. So.

JOSEPH

36:04 As I scroll down, you can see my different clock events here. I'm 700 Miles away from the cosco and south Miami and it'll flag that when I say I'm on site, it'll say, no, you're not. And then it'll drop a little pin on exactly where I'm at.

--- Deficiencies ---

JOSEPH

36:23 And then down here underneath efficiency, this is where that bad compressor came in. So it will show up on, the work order in which it was found. But it'll also show up in an email or a report. So I can say, hey, this is that notification that came via email in operable deficiency found at cosco, got a bad compressor. And this can go to the account manager. It can go to a general deficiency inbox that a team works out of. It can go to all sorts of different... destinations. But this will show me, hey, where the problem is found, what piece of equipment it was found on description of the problem, it will show me related efficiencies. So any other issues on this same RT, it will show me that before I quoted out. So if it's something out there, it seems like a bigger issue. I can know that now before I send the quote. And then it'll also show me the attachments the audio memo I took in the picture that I took...

--- Quoting ---

JASON

37:23 Right from.

JOSEPH

37:23 Here, I can just click add to quote and create quote... and it'll throw all this onto a quote that is a separate entity from the deficiency. So I can track from the time that it turns into a quote and becomes it gets approved, becomes a job and gets completed.

--- Deficiencies ---

JOSEPH

37:40 It can then go back and mark that deficiency as fixed. So you can really tell your customer the whole story of the problem that you're saving them from.

JASON

37:48 So, this is your quoting piece within service trade, not Northboundary, so, you just say replace compressor... partly, you list all that out. How does that look when you list it out? Is it just very?

--- Quote templates ---

JOSEPH

38:07 I'll apply a quote template for that generally. So, I think this is what you're asking. So I'll say, hey, have a compressor replacement. And then I'll have my description of what needs to be done and then parts and labor that get added to this.

JOSEPH

38:22 And we generally, if it's a new, if it's a new maintenance contract or like a project, all that gets quoted out of Northboundary, but if it's one of those like pull-through repairs, that gets quoted out of service trade just because it's quick and it's all about just getting as many out there as you can.

--- ST app contracts and pricing ---

JASON

38:37 Right.

JASON

38:42 And, where, what is the estimate look like?

JOSEPH

38:46 About to send you one?

JASON

38:46 Okay.

JOSEPH

38:47 So before I do wanna touch on a couple of things here that contract pricing will automatically apply based on location and type of work. So it'll have my contract mark up rules. And if I change this to 55 dollars, it'll flag that and say, yeah, you can change it if you want, but your contract price should be 60 dollars.

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

JASON

39:07 Got it. And.

JOSEPH

39:08 Then I can also control how I want the pricing display to the customer, whether it's grand total only or line item by type or something like that. And then I can keep a eye on my gross margin down here at the bottom. From here. If everything looks good, I can click send to customer. I'll just make this a new quote. I can toggle the media on or off. So if my technician, I all have these default off and you toggle them on because technicians can say some outrageous things in these audio. And then I can toggle your name on there as my contact. Then as I scroll down, I can also toggle this to require a po for approval. So I don't have to go chasing that down later. So if you got access to your email, that should show up here in just a second. And then you can open it up and click on approve. And I promise I won't send you a Bill for a compressor replacement.

JASON

40:12 So click view, click here to view details pro request.

JOSEPH

40:18 Yep. It'll look a lot like this. What I've got pulled up here.

JASON

40:28 Okay. So there's a ton of work. Well, the blah there's the attachments grant.

JOSEPH

40:37 One thing to note about the attachments. If you click on that picture, it's not a, it's not a grainy little thumbnail picture. It's actually a high quality picture, which is pretty rare for the software programs... Jason amount of this location.

JASON

40:56 Yeah, that's cool. And then right there within that document, they can approve it or request.

JOSEPH

41:02 And we did not put a reject button on there purposefully because if they have a problem with it, we wanna know why we don't want to just hear no.

JASON

41:12 Okay. Is there? Yeah, right there? Yep. If we, if we needed it to be a two page document because we got a page in terms and conditions, you just attach it to this document, be two pages.

JOSEPH

41:25 At the very bottom, there's the terms and conditions, and it's not really a pages thing. It'll just keep going.

--- *Quoting* ---

JASON

41:31 Okay. Yup. Cool. So, did...

JOSEPH

41:35 You click approve on that for me?

JASON

41:39 Enter your purchase number. Checking this, confirms you have read and completed the... proof quote.

JOSEPH

41:54 Then go, so I'll get an email saying, hey, the quotes been approved. It will show up as an improved status in my quote reporting page, and then it'll also just show approved here. And I have two new options. I can either create a job from the quote or I can add it to an existing job if my technician is going to be out there for something else next week, might as well roll one.

JASON

42:13 Right.

JOSEPH

42:16 And then from here, I have a full history of the quote. So I can see when you viewed it when you approved it. No, is your po number? Nice. And this is super useful if you are trying to track down. Hey, who did approve the quote? Where when did they approve of that sort of stuff? But it's also a great sales tool for reporting. Excuse me. So I can say in my quote reporting page here, show me all the quotes that expire at the end of this month that have been sent to the customer and viewed by the customer but not yet approved. It's probably open in their in box, they're not going back to it. I need to find all of these quotes and then just bulk select all of them, resend them to the customer. It's amazing how often it takes two or three times seeing it. And you can, now we just rolled out a thing where you can set up, hey, every week, just send it again, send it again, send it again till it gets approved.

--- *Customer engagement* ---

JOSEPH

43:15 So, this is really what one of the places where our customers see the most immediate return on their investment with service trade. Do you see how this really helps drive repair revenue in a company like yours?

JASON

43:25 Yeah. So question, for most companies you work with on a little repair type stuff. Do they have inside sales guys that just quote that?

--- *Quoting* ---

JOSEPH

43:35 Yep. They have dedicated a lot of companies. They, they have dedicated deficiency quotes... yeah, because it, it's funny. It used to be, everybody would focus on, the big dollar deficiencies. They were the ones you wanted to Chase after. They were the ones everybody wanted to focus on. But those, they require a little more conversation before they can get approved, they might take a week or two to get approved. But those little ones, the 1,000 dollars, 5,000 dollar quotes, if you can crank those out and just kinda stack them up, those will get approved quickly and you can go deliver on that work quickly.

JASON

44:14 You keep your guys going.

JOSEPH

44:17 Exactly.

JASON

44:18 So, we are just...

JOSEPH

44:20 Those approved and then plan it into the next visit. If it's not something that's pressing. Hey, we just have a high margin repair that just got added onto the next PM kinda.

JASON

44:31 We've or I guess band is always utilize salespeople. They just assign every account to a sales person and the salesperson gets notified on, you know, the little repair. Well, then you got your salespeople just processing paper all day long instead of driving big projects. So, I'm trying to change that without having my truck blow up in the park. And when I...

JOSEPH

45:02 I mean still give them a percentage of the pull through revenue, but also, you could give the, give them a slightly lower percentage and then take that off of their plate and then put inside sales person on just quoting anything out of service trade.

--- Quoting ends ---

JOSEPH

45:16 Keep the sales people in Northboundary, get an inside sales person and service trade to just focus on these efficiency quotes. And generally, if you got an older technician that's trying to get out of the field, they can be the best people for this because they know exactly what needs to be on that quote.

JASON

45:31 Right. Yup. Okay.

JOSEPH

45:37 And then all this is really what I was talking about earlier when it comes to the reporting where I can see, hey, these are all the jobs with efficiencies and this is how many of those got quoted out. And I can really dig into these.

--- ST app contracts and pricing ---

JOSEPH

45:51 And while I'm on this reporting page, I'll click on this home button. And then I can also go into let's see, I'll go into margin analysis. So this is where I can see my different contracts. The, these are all anonymized. This is actually from a customer. They gave us permission to just use theirs, but they anonymized all the data.

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

JOSEPH

46:13 So these would be your different contracts. And then you can see which ones are actually doing well and which ones aren't based on color... and then also which one is the other one I wanted to show you this one.

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

JOSEPH

46:43 I've got too many of these in here. Let's see margin breakout. I think... yeah. So these margin breakouts, I can sort this by different by customer or job type or whatever I want. I've got it filtered by job type right now. And so if I wanted to, I could have all of these collapsed. So I could just look at a high level and then I could see my Installation job. Those are bad. I need to open that up and then I can have it go to the individual types of parts or I can have it go to the actual jobs themselves. So from there, I can drill in and kinda see things at a high level and then open it up as I need to drill into things.

JASON

47:26 So that, that's as a whole, the Installation projects are... at a whatever negative 211.

JOSEPH

47:39 The, the fees. So like, the random fees that they pay for permanente and that sorta thing. We're losing a lot of money on that. Somebody in our demo account just probably type that in.

--- *Recurring maintenance* ---

JASON

47:52 So, but that's saying your preventative maintenance contracts as a whole, we're only grossing 19 point nine percent that that's correct 1,000,000 dollar base and they're at 20. So then if you open that up, then does each individual preventative maintenance under that bucket show or no?

JOSEPH

48:12 It can, yeah, the way this is set up, I don't let's see if I can.

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

JASON

48:17 My thought, what, the reporting I was used to see in was like, you go, okay, service calls, contracts, service projects. So you could go to contracts and you'd say, okay as a whole, I'm tracking 38 percent here's. Every active contract. And then, you know, if it's below 40 percent, it'd be red. If it's above, it'd, be green, whatever you have that set up at. But you could quickly in a snapshot drill into where your problem is, instead of typing in 8,000 job numbers, trying to find which one sucks. It would tell you which one sucks. So that's what I want to be able to see for contracts, service extras and special.

JOSEPH

49:03 Projects. Yeah. So you can build these out with whatever levels you want and you can do job type or you can do like contracts, then locations and then job type, and then individual jobs. That sort of thing. I had one in here the other day that actually did a little bit better job of illustrating that maybe it's in this one.

--- *Recurring maintenance* ---

JOSEPH

49:29 Yes, I job profiles. So here I've got my different offices. If I have multiple offices, from there, I can go into the different companies that I'm working for and I can let's say roll up all of solutions. I can see the cost and margin. And then from there, I can go to the location and then the job type, and then the individual jobs and you can create these and whatever sort of progression that you want.

--- *Dispatch* ---

JASON

49:57 Yeah. So we have two regions, we have the west central region, the southwest region. So we have two offices and the customer base between the two offices, you know. So a customer site will be assigned to a region. It's possible to have a customer site in the southwest and in the west central, but they'll be individual sites assigned.

--- *Dispatch ends* ---

JOSEPH

50:19 Region, right?

JASON

50:23 Bottom. And I don't need to know how to do all of that right now. I just need to know that I can quickly go to every service call that we ran this month and see how we're trending as far as gross profit.

JOSEPH

50:36 That's you certainly can.

--- *Recurring maintenance* ---

JOSEPH

50:37 So this is an individual service call or this would be the service call right here. Looks like I've only done one for this location.

JASON

50:46 But can you see it as a whole? Not necessarily like as a broad dashboard, here's, my profitability dashboard. And then on that dashboard, I have service calls, projects and contracts and I can see as a whole. And then I can open contracts, see every individual contract, and just drill down like that. That can be created.

--- Implementation and ongoing support ---

JOSEPH

51:09 Yes, sir. 99 percent. Sure that, that's that can be created. I'll check with our reporting guys and I'll take the exact wording you just did and ask them. But yeah, this is super flexible in the way you can just kinda route it any way you want. And, if you all have people that are pretty technologically inclined to build these out, we can teach you how to do it and you all can run with it yourselves or we have an internal team that can help build all these out and, they work with all sorts of different clients to do it.

JASON

51:37 Do you have an implementation team that gets this all set up for us or is, okay.

JOSEPH

51:43 We, we don't use any third parties for that. That's all internal. We'll work with you to do implementation. And then the especially the reporting side that's generally more of our technical account managers and, they are kind of like you're for lack of a better term, your own dedicated service trainer, that just kinda helps you with reporting.

--- Implementation and ongoing support ends ---

JOSEPH

52:05 And so PS and things like that. And they take what they learn at other companies and they say you're trying to build something to give you this. Well, hey, let's try if you want to try it this way. We can, I saw work with somebody else. So there's a lot of good idea sharing that they do as well.

--- ST app contracts and pricing ---

JASON

52:19 What's the whip look like? I don't know. I don't know if...

JOSEPH

52:24 I've ever clicked on that one.

JOSEPH

52:29 Broken down by project manager, job type, company, location... price, duration. And cost. And then underneath each individual job, I'm gonna jump to here real quick. You also have a performance. So this is kinda like a manager or I can view the whip right here, so you can have individual whip for each project and service trade.

--- Pricing ---

JOSEPH

52:58 And then the reporting side can give you a more holistic view of it if you wanted more of like a report.

JASON

53:05 So I'd say in of the total labor cost estimated 6,440 dollars. We've used 2,160.

JOSEPH

53:13 That's correct?

JOSEPH

53:20 Okay. All right. We got a few minutes left.

--- Dispatch ---

JASON

53:24 What about what's the dispatch board?

JOSEPH

53:28 It's pretty basic. It's simple. It's a dispatch board. It's... each technician has their own swim Lane. You can click and drag from available jobs down onto here.

JASON

53:42 Unscheduled. Do they just reside in a bucket somewhere that's all?

JOSEPH

53:47 Top here. So I can see all my PM jobs to jobs. I can sort those by location or priority, your due date or any other filter here. I can also filter it by office. Then I just click on one and drag it down onto the schedule. Put that on Brook schedule and it will trigger a notification to her to say, hey, this is added to your schedule. And then, so this is more for the day to day like reactive scheduling, filling out the individual schedules. But then we have a map based scheduler as well that's more focused on proactive scheduling of PMS and things like that.

JASON

54:27 And, and do the two, is, we have a regional dispatcher for west central regional dispatcher for southwest and then a PM dispatcher that it's her sole focus to make sure we get the PMS done in the month that we're supposed to get done because the other dispatchers just showed calls and we never got any PMS done. So, I got a full time service agreement. Dispatcher. Would there two boards see each other? Or is it a different board that they wouldn't have visibility?

JOSEPH

55:00 You can, you can limit that visibility. But if you want them to be able to see what other one's doing, they can just kind of... it can update live in the background so they can at least see where all the other technicians are.

JASON

55:13 My thought is you have to have visibility because if she put somebody on a PM and schedules it with a customer and you can't put a call on that guy. So the dispatch to see.

JOSEPH

55:25 Yeah. So I mean, if somebody came to Brook and they were trying to do a service call for right now, they see shoot, she's already scheduled out at costco.

JASON

55:35 Okay.

JASON

55:40 So they enter a call, the call gets populated in this unscheduled. And then you drag it to whatever guy you want it on.

JOSEPH

55:49 That's exactly right?

JASON

55:50 What's all the stuff in the middle there? A plus refrigeration, hard, bark abbot cooling.

JOSEPH

55:55 These are just my different offices and my demo account.

--- Dispatch ends ---

JOSEPH

55:58 Everybody creates their own office. Like I've got... Lauren office and all these different offices. It's just a J 's mechanical as the one I work out of. So nobody messes with my asset.

JASON

56:10 Gotcha. Okay.

JOSEPH

56:20 Well, I could, I mean, I could talk to you about service trade, for hours, but today was kind of a high level overview.

JASON

56:26 I...

JOSEPH

56:26 Send you an example of the invoice feature as well. Kind of what that looks like. I'll send that to you here in a second. Okay, I mean, what are your, what are your thoughts on service trade as a whole? Think it's worthwhile to run up the chain?

--- *Accounting integrations* ---

JASON

56:39 Yeah, I do. I know that my it director will ask much higher level questions on how it all integrates and works because since we have multiple departments and everybody's in vista, so I can't not be in vista and, they wanna make sure that whatever I use, the financials flow through vista.

--- *Accounting integrations ends* ---

JASON

57:07 So that's gonna be a lot of questions from the it guy is how seamless is it? How... you know, what type of interpretation errors have you had in the past where it causes problems in and on the vista side of things because they're gonna build, they have centralized billing.

--- *Accounting integrations* ---

JASON

57:28 So it's gonna get build on it. Vista. It won't be build out of this. So this will be, this will be the management software for service. So I don't know how all that would work if that.

JOSEPH

57:43 Yeah, I'd say about half of our clients Bill out of their accounting system, half do it out of service trade.

--- *Invoicing* ---

JOSEPH

57:50 The real value out of service trade is it's all the same, look the same feel, it's a better customer experience for sure.

JASON

57:56 Yeah.

JOSEPH

57:57 And we don't charge for admin users. So if you wanted them to Bill out a service rate and then push the Ar, invoice to the vista after the fact, you could have your centralized billers, billing out here. It is up to you ultimately, but it is a better customer experience to have it all going out of service trade because you'll see it when I send you the invoice there's, the invoice. And then like LinkedIn there, it says go to service details. So your customer when they're paying the Bill, if they're like man, what is this about?

--- Invoicing ends ---

JOSEPH

58:23 I don't know. I don't I wasn't on site for this, they can click on that. It takes them right to the service report with the pictures and the videos and the onsite customer signature and it's...

JASON

58:31 Okay. Yeah. I just know, I'm not disagreeing with you. I just know from my previous conversations that they have a billing department that the billers Bill for plumbing, for Construction, for sheet metal, for electrical, for service. Everybody's across the board the same. So for me to say, no, I wanna be different that probably.

--- Paper process ---

JOSEPH

58:58 Uphill battle.

JASON

59:00 So...

JOSEPH

59:00 Yeah. I'm fighting that with another fellow right now. He's trying to just pull all the service billing and have his dispatchers do it because the centralized billing is taken two damn long. He's like I can't wait three weeks to get a Bill out that happen the next day.

--- Paper process ends ---

JASON

59:15 I tried to do that last year, and I actually hired one of the billers a way to be my service agreement dispatcher, trying to be slick, thinking that, okay, she's got the billing background. I can utilize her for my service billing. So, I'm not completely over that fight yet, but that's kinda, I got shot down first round, so.

--- Accounting integrations ---

JOSEPH

59:39 Interesting.

JASON

59:41 Okay.

JOSEPH

59:43 Well, you want me to send you some times over the next two weeks, that would?

JASON

59:47 Yeah. I have.

JOSEPH

59:48 And also, Tania is our accounting integrations lady. She used to be the CFO for a contractor here in Raleigh and she sold Sage and Accumatica systems for years. So she's super in TUNE with how these new work, how the integrations work, that's what?

--- Accounting integrations ends ---

JASON

1:00:02 Yeah, definitely. So, I have my managers meeting at one o'clock today where I'm gonna introduce this product in the Northboundary stuff. So if you do a quote in Northboundary, there's just going to be an additional button saying send it, you know, create a work order or something and it'll send it. So there's no double entry there exactly. So, yeah, I'll relay what I saw today and what I'd like to do. And then you send me the dates that are available and I'll be able to see if I can get them to commit to a time, one of the dates that you sent?

JOSEPH

1:00:40 You all still looking at the, you said you're looking at BuildOps as well, right? Or they were.

JASON

1:00:43 Yeah. I table them because I wanted to see this first. So, yeah, those are the, those are the two I've got it down to as BuildOps. And then now, this because I mean, you having Northboundary, puts you in the car seat because I don't wanna lose eight years of data that we have in Northboundary, and have I have some older sales guys that it's taking forever to get them to actually utilize what they do utilize out of Northboundary, I don't want to start over with the new software and I like Northboundary, just in like Vince. Yeah.

JOSEPH

1:01:22 I hear you. I've heard that a lot. He's he's a brilliant engineer and he's still on that side of the house, but we've got actual sales people on it now and actual support people. And, as we build more and more of that out, I'll be sure to share that with you.

JASON

1:01:37 Great. Okay. Well, yeah. Shoot me, shoot me, your dates, show me, shoot me the invoice. And then like I said, one o'clock today, I have my managers meeting. I'll see if I can get them to commit to the next steps.

JOSEPH

1:01:50 Cool. Yeah. Let me know how it goes.

JASON

1:01:51 Will do.

JOSEPH

1:01:53 Appreciate your time, Jason. We'll talk soon.

JASON

1:01:54 Thank you. Bye.

The End