ERA - Renewal Review

Angelo Sharp with Emergency Response Associates
Recorded on 8/9/23 via Zoom, 55 min.

Participants

SERVICETRADE

Angelo Sharp
Account Manager

Skip Mangum
VP of Account Management

EMERGENCY RESPONSE ASSOCIATES

Scott Lipner
Sales and Operations

Topics

Transcript

ANGELO

0:00 How's it going? Angela? Good. How are you?

SCOTT

0:02 Not bad at all.

ANGELO

0:04 Great. It's early morning.

SCOTT

0:07 Jump, let's jump into it.

ANGELO

0:09 Yes, of course.

SCOTT

0:11 Before I retired, right?

ANGELO

0:14 Yeah, we may, our VP may be joining here shortly.

SCOTT

0:19 Cool.

ANGELO

0:20 So, I wanted to go over.

SCOTT

0:22 Renewal...

ANGELO

0:22 I know that... they love to just do stuff in the morning. Wanted to go over. I know we had a conversation back when you switched over. I switched over as your account manager, conversation with Dorothy that you had in the past, and also the

conversation with Anita. I've reviewed that call and also touch base with both of those individuals. So I just wanted to touch base here. I did do some additional reviewing on your account... as far as usage goes, and I wanted to pull that up for you, so we can take a look at it together. Let me remove these real quick.

ANGELO

1:15 I touched base with the... service forms team. It looks like they got everything up and running and supporting your team with the issues that we talked about.

SCOTT

1:26 I believe they're working on it and in my office said that we're moving in the right direction, I guess. So, like I said, I don't typically get involved in the nitty gritty there, but I hear about it when it's not, I hear about it. You know, when, what I need to hear about it?

ANGELO

1:42 Perfect. All right. Let me share my screen here.

ANGELO

1:53 Let me get my screen, think you can. So I knew we went over helpers, and also technicians, what technicians are, what helpers are, and what determines a technician versus a helper. And those big actions are things like reporting deficiencies clocking in and out. Of course, is it because both helpers and technicians have access to clocking in and out. But one thing determines that usage is something like the action of reporting and deficiency. So, right now, you have 13 technicians contracted for tech licenses, but after reviewing your account, it looks like we have more users reporting deficiencies more than that 13. I think it's about 18. So I'm trying to get a better understanding on actions that your technicians are making or if there has been some changes within helpers being upgraded to technicians that we have been aware.

SCOTT

2:53 So, so, I had discussed this, I believe with you or I just see somebody on there. I want to disable.

ANGELO

3:05 Yeah, we had a discussion, right? When I got you as.

SCOTT

3:08 You see the, can you see logging information?

ANGELO

3:12 No, not as far as passwords and stuff, but as far as logging in as a user, we can do that... we have like.

SCOTT

3:20 Like, like you see the last time somebody logged in as a user or somebody went through, like could you see the usage on bogan sis to how... I just deactivated him? But just out of curiosity, what is?

ANGELO

3:34 This is it? It is right here. It doesn't have any efficiencies that were report it. So we...

SCOTT

3:39 How...

ANGELO

3:40 Long is this report? This was in the past 30 days? I just.

SCOTT

3:46 Okay. All right. Whatever. I'm good for now. Okay. All right. So, I try and explain this to you, as to how we work, right, right? I have a... Installation department... and an inspection department and a service department. All right. We try to use service trade for scheduling purposes more than anything else for my installers, right? So my installers are gonna be in service trade, but they are really in there for us to be able to assign the job to them. So they know where they're going in the morning, right? Right? My installers are, AJ, AJ, Ed was an ad as a service guy, right? Hector installer. So, so you also there's a couple of people that aren't on this list, right?

ANGELO

4:48 Yep. And that's fine. But the people that are not on this list don't matter because they're not taking actions they.

SCOTT

4:54 Have. So I also want to get these guys using the guys that aren't on the list. I always want to get them using ServiceTrade more, to a certain degree. But like only for so like I want my installers to be able to clock in. I guess I'll wait for Skip, to jump in also.

ANGELO

5:15 Hey, Skip.

SCOTT

5:16 Hey...

SKIP

5:17 I'm so sorry, I'm late.

SCOTT

5:19 No, it's all good. We, we're just getting started anyway. So you don't probably miss much just me having involved in for a couple of seconds.

SKIP

5:26 How have you been Scott?

SCOTT

5:27 Not bad yourself?

SKIP

5:29 Doing doing well. Thank you.

SCOTT

5:31 So I was just diving in if you can see on the screen is the tech usage. I was trying to explain to Angelo how we typically work. So, so a while back when I was with, I might have been created dart, I don't remember. It might have been dare, but it might have pre dated dart. I kind of explained that, we use ServiceTrade for our installers. And the only thing they're really doing is maybe clocking in and out of jobs right? Seeing where they're going in the morning and adding pictures at the end of the job and marketing your jobs complete. So we can actually see what, you know, what, you know, we can have record of the job being complete. Now we're starting and I'm gonna start pushing my installers to use service forms to a certain degree just to fill out the final paperwork on a job. But that, that's it, these guys are, you know, on jobs for multiple days, you know, I might schedule them for like eight days on a job. They probably never, you know, in reality, they probably never open up service rate after they're on the job for the first day. And we always classified these people as helpers before service rate actually had something going to helper license. So we were getting build at a different rate for my installers than we were from my inspectors because my inspectors are going to be using service rate to the fullest ability of, you know, at least, you know, in, are in our world, of doing that and that's what you're gonna see.

--- *Call Setup* ---

SCOTT

7:03 So Alex is on the ser team, Evan is our quality control guy. So he kinda goes around and Clint some stuff up. Frank is on the search team, Jim's on the service side, John's on the search side, John's on the search side, Lawrence was on the search side, but now he's on the Installation side. So you'll see that activity kind of go down but, mardi is on the search side, Mike shields is our fire extinguisher technician, Mike keys on the search side at Rob and Ryan, Steve, all of these guys. So there's a couple of ones right off the bat that I kinda wanna touch on with Josh. So, yeah, Lawrence is installer.

--- *Call Setup ends* ---

ANGELO

7:43 So...

SCOTT

7:44 So...

SKIP

7:44 Let me ask a distinction here because yeah, no, I totally understand like, you know, got clock in clock in our, there's a comment or two there's. You know, there's things like that. Entering deficiencies and capturing deficiencies is definitely a full tech profile.

SCOTT

8:02 Correct. Our installers wouldn't necessarily be doing that.

SKIP

8:07 So, Angelo explained to me, so on that deficiency column, what does that mean that they've captured those deficiencies, and they are logging them?

ANGELO

8:19 So, yeah, from the report that we pull it distinguish distinguishes which technicians or helpers in of itself, what actions they're taking. So you can see the clock in it as well. But this distinguishes for example, Alex and specific within ServiceTrade within the last 30 days has reported 92 deficiencies. That means that his users physically went in and reported efficiency on some specific jobs and then report those and upload those into ServiceTrade that's what this column.

SKIP

8:50 And that is a full tech that is a full tech attribute.

ANGELO

8:57 The only way that they can do that is because everybody has currently assigned a full tech. So they every single individual have access to do so. And so when they have access to do so, and the action is taken, that action is then report it. When we run a report on that, it tells us exactly how many times they've reported it over a certain period of time.

SKIP

9:17 So, Scott, if you are thinking that there are a couple of people on here that are changing their roles and not going to be capturing deficiencies in the future, totally cool with that, and we can kinda take them off.

SCOTT

9:29 So, so Colby gave and Josh work in the office. So Dave goes on the road every once in a while, but these are office guys. So Josh creating a deficiency or Colby or Dave greeting deficiencies, kind of more of, my guess is Dave or because he's trying to clean stuff up. So, you know, you see 560 deficiencies from him. He's probably deleting and recreating deficiencies to maybe change the wording or clean them up

from what enter in the field. Colby is going to be same and Josh is going to be the same and myself, I mean, I'm not doing it as much as they are. So I'm not touching, you know, like I'm not really touching it as much as they are. And then, and then I'll kind of touch on them and you can make a red by the way. I killed. I activated, okay, if you want if these colors are actually representing something to.

SKIP

10:31 I think the green was what Angelo was saying. These really look like paid technicians.

SCOTT

10:40 So, so Colby, Dave and Josh all the way at the bottom, well, the four at the bottom Dan, Josh, Andy and myself, we're office staff.

SKIP

10:52 Yeah. And.

SCOTT

10:53 We're working, the four of us are working on this in the office and we're really, you know, Andy myself every once in a while will kind of pick up a service call when we're on the road, right? You know, in travels, we might do something. We're on a sales lead. You might enter a deficiency, like if we go out to a sales lead for an existing client, you find something that's efficient. We might enter a deficiency to be able to the quote off the deficiency. And then Josh and Dan above me are also in the office. So they're like Dave and Colby. So they would be Dan. Now, Dan has self assigned a technician license because he's like doing service forms in the office. He needs to be able to dispatch stuff to himself to try and make sure he's able to replicate what we're doing on a, you know, what we're doing on our side?

ANGELO

11:48 To testing?

SCOTT

11:49 Yeah, exactly.

ANGELO

11:51 Yeah.

SCOTT

11:53 Technicians, and, you know, they work pro, so he tries to replicate them, but he needs to have a technicians license to be able to do that.

SKIP

12:00 Okay. Fair enough. So, Angelo, let's count up the greens and let's...

SCOTT

12:05 So, before you count the greens, like, so like the like, I know you had something called help relations Alex, Welsh at the very top and Robin or like our...

ANGELO

12:18 Throw...

SCOTT

12:19 Through 100 percent helpers, except they might like our helpers might be on a job at the search tack and they're entering efficiencies, you know, because the search guys walk around with their following around and they're saying, Alex, this is deficient, enter this, you know, these guys are, you know, these guys don't go to jobs with us, you know, they're a second guy and every job they're on, but obviously, they're still going to be entering like you now, they're going to a efficiency. So I'm not sure that or a helper can't enter efficiencies, but helpers, the guide that's you know, that might be the guy on the phone while, the senior cat, is kind of dictating to him... which I don't think would be that far into anybody.

SKIP

13:06 Yeah.

SCOTT

13:07 You know, the helper on a job, you know, a lot of times our guys might, our helpers might be going around adding assets while our other guys are going around testing.

SKIP

13:14 And they're full text. So, so helpers do not add efficiencies there. There's a, there's a pretty Bright line. And so we're kind of blurring the lines a little bit for you here, on Colby and David and some of these others, but helpers in the fields, if in the field, if they are adding deficiencies, they are full.

SCOTT

13:39 There. So I help her would almost be like, I have a couple of guys on that work for me now that probably have had. So you don't have them on your list. And the only thing they're doing is clocking in and out this. My guy, Paul and Steve coach are going to be their Installation helpers, their own installed jobs to somebody else. But really on an installed job, we're not doing anything except we're really clocking and clocking out, right?

SKIP

14:05 And that's the intent of the helper role is really just that basic functionality to be able to kinda log time and stuff like that.

ANGELO

14:15 Yeah. You won't see them on this list too if they haven't been using specifically or they're not assigned to technician like the actual role. So what this report does is it pulls every single user. And the reason why you're on here is because you're assigned as a technician in within service rate. So it pulls every single user has assigned as a technician. And it pulls a report for their appointment, their clock in events. And then also if they've reported deficiencies or not. So that's the determining factor of giving the access is.

SCOTT

14:44 I understand that as a company, you guys need to figure out... how to differentiate, you know, globally like you can't talk, you know, you guys have 5,000 clients. You guys can't you know, like you gotta be able to try and figure out, you know, window that works for all 5,000 as opposed to something that, you know, so, you know, it is opposed to cater to every individual person. I understand that, you know, so like trying to, you know, we could go through this all day. But, but when push comes to show, I think we're gonna get down to something that's comfortable for all of us in this conversation.

SKIP

15:23 Absolutely. Yes, you're right? You're right about that, and thank you for working with us on it and for understanding. And we're trying to do the same thing for you. So we're not trying to, we're going to be flexible.

SCOTT

15:35 I appreciate that. You know, you know, I have, you know, great things to say about ServiceTrade. I have bad things to say about service trade. I, you know, I have my frustrations. I have my, you know, all moments. So, you know, I can go, in every any direction. I think that we were one of your, you know, we were one of your early adopters. We've been online since 2017. I think, you know, in 2016, we made our commitment to doing service trade in January first 2017. We had went full steam ahead. So, you know, I think, you know, I think, you know, we're approaching what? Six years now? You know, it's almost seven years. So, I, you know, I would believe that we're probably one of your, you know, one of your oldest clients.

SKIP

16:24 Yeah, yeah, we're you're one of the veterans. So we appreciate it. And we hope that we've helped you as a company grow and see that revenue line. Hopefully those, how, when you see the revenue line...

SCOTT

16:37 You know, I, you know, there's times where I say how, you know, how do we ever do it without ServiceTrade? You know, and then there's times where, you know, I debate whether I return the guy from building ops, his phone call. So, you know, I, you know, maybe I'm just like everybody else, you know, back in 2017, there weren't you know, service tight in building ops and in, you know, all these other ones that, you know, workforce and everybody else who's calling me on a regular basis.

ANGELO

17:13 I...

SCOTT

17:14 So, we...

ANGELO

17:17 The goal is.

SKIP

17:19 Loyalty, Scott, and we wanna work with you. So let's figure out, what we need to get put in here. So... you feel good about it.

ANGELO

17:31 Yeah. So you got 13 contracted licenses right now from the green ones. We're at 14. So if we need to dive deep, take a deep dive on how those individuals views, we can do so. And then also, I have some suggestions, I just moving forward as far as users that may be doing testing and are assigned as a technician. This is what I suggest to most of my customers. That way we don't get confused on our end. The best thing to do is if someone's testing something, let's say they're office user and I need to run in and test a form, assign themselves as a technician that's fine, run a test on those forms once those tests are done and they're good to go. And we know that they're good to go remove that technician user, because the only thing that we see is that person is assigned as a technician and they send us a report to say, hey, it looks like they've added five new technicians that just helps us. And it also helps you align on how many technicians specifically you have, and that just that takes like one click to do while they're doing that testing, whether it's two weeks, whatever it may be in that time frame. We normally run these reports every quarter. So that gives us an understanding on who's actually a technician and who is not. Does that make sense?

SCOTT

18:44 It makes sense? Is, it, is it going to happen? I?

SKIP

18:50 It's it's okay.

SCOTT

18:51 We're we're busy just like everybody else, you know, and, you know, I think that we walk into the office at eight o'clock and we hit the ground running until four o'clock right? And, you know, and then, you know, everybody wears many hats and everybody goggles, everybody does this. And, you know, you take phone calls all day and, you know, I mean, you know, can, I expect my development guy to uncheck technician from his box, you know, every time he wants to test something and, you know, I don't know.

ANGELO

19:23 I'm not sure that.

SCOTT

19:24 The, you know, I'm not sure that's the solution to my trial here, right? I can't my goal is not to make this more difficult.

ANGELO

19:34 Yeah, but the beauty of it is, I know now, so regardless if you do it or not, and I see that report and I say who's this Daniel guy? I can go back to this list and say, yeah, Daniel is an individual that's testing, right? I have to have some understanding that way, I'm not letting accounting know and they're like, okay, they have three additional users and they charge you for three additional users long as we have some clarity and I have a list to go back to. If I do see that I can say, okay, that's correct, right? Or if there's another user add it. And as a user that's not on this list, that's when I can have that conversation with you and reach out and say, hey, it looks like you got someone named Billy Bob Joe who's assigned a technician. Tell me more about that user, that way we can assign them properly. Does that make sense?

SCOTT

20:16 I mean, I could go, you know, in, you know, in edit user in, you know, I gotta go edit, you know, I can write a narrative and user details, you know, if I needed to for something like that, but.

ANGELO

20:31 Yeah, I mean either or this conversation is solving it. So we're taking care of the current users that are within the account. So when next quarter we run a report, I see a report, it says that there's four text over. I can go back to this list and say it's these four individuals here that work in the office. And then it's not an issue. So just having that align will help me better understand how you guys are using the account. And then I can forward this and put this in your, on your account details. So for instance, in the future, if we have an account shuffle, it's already there and I can communicate that to the individual that may or may not be taking over your account.

SCOTT

21:10 I cats, right? I mean, we've been through five different sales people. It seems like you guys shuffle territories, or reps on a regular basis.

ANGELO

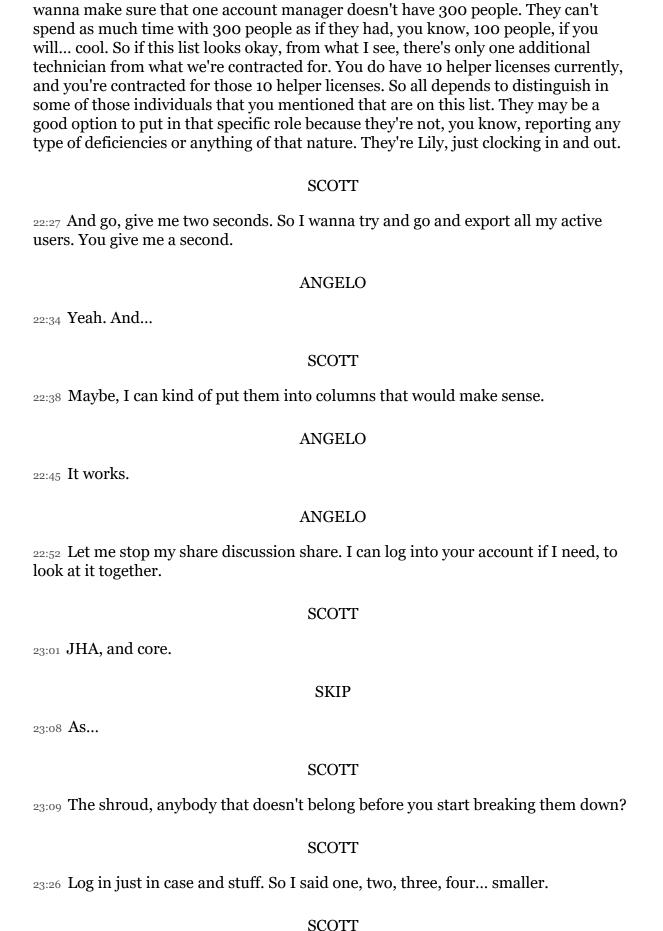21:18 We're just growing. So we wanna make sure that we have the right amount of account managers and representatives to spend time with our customers versus having so many customers and only a couple of account managers.

--- *Pricing* ---

ANGELO

21:32 So it's just because we're growing and that's a good thing. So we've added a couple of additional account managers because our client tail is going up and we

wanna make sure that one account manager doesn't have 300 people. They can't spend as much time with 300 people as if they had, you know, 100 people, if you will... cool. So if this list looks okay, from what I see, there's only one additional technician from what we're contracted for. You do have 10 helper licenses currently, and you're contracted for those 10 helper licenses. So all depends to distinguish in some of those individuals that you mentioned that are on this list. They may be a good option to put in that specific role because they're not, you know, reporting any type of deficiencies or anything of that nature. They're Lily, just clocking in and out.

SCOTT

22:27 And go, give me two seconds. So I wanna try and go and export all my active users. You give me a second.

ANGELO

22:34 Yeah. And...

SCOTT

22:38 Maybe, I can kind of put them into columns that would make sense.

ANGELO

22:45 It works.

ANGELO

22:52 Let me stop my share discussion share. I can log into your account if I need, to look at it together.

SCOTT

23:01 JHA, and core.

SKIP

23:08 As...

SCOTT

23:09 The shroud, anybody that doesn't belong before you start breaking them down?

SCOTT

23:26 Log in just in case and stuff. So I said one, two, three, four... smaller.

SCOTT

23:50 On...

SCOTT

24:27 And doing this so you can actually see that?

SCOTT

24:37 I'm gonna break this down as guys that are kind of like who I think would need a, who I think would need a full license okay?

SCOTT

26:08 For license?

SCOTT

26:21 All right. So.

ANGELO

26:30 These are my.

SCOTT

26:31 Like true and true installers. Okay? Right here are my inspectors or fire alarm extinguishers, and then that's the right number based on what we just came up with. So at least for these guys. And then here are, this is my office staff right here, perfect.

ANGELO

26:53 I help a lot.

SCOTT

27:03 A label and... these are my helpers. So one... for.

SKIP

27:21 Yeah, thanks for putting that together for us.

ANGELO

27:24 Yeah, that'll make it a lot easier. Yeah. So essentially, there's only been one additional tech that's been added. Yeah, I mean...

SCOTT

27:36 It's actually, the number is actually, you know, I have 14 full time guys that I really think you'd use it full time. I have eight followers which you might classify as full time text. But for me, I probably stopped using ServiceTrade before I paid a full time rate for these guys, right? You guys that are true helpers right now?

ANGELO

27:59 Yeah. I think that in total for the installers and the other two helpers is, the 10 helpers that you currently have on the account?

--- *Pricing ends* ---

28:08 Yeah, that would, you know, kind of add up, to the right number. And then, in this... sorry, what is text to?

ANGELO

28:21 You're good... when they call protect, she got to response.

SCOTT

28:32 In, in and like these... I would say these people are in service trade. These, these people are in service trade whether it's scheduling or... non stop, right?

--- *Pricing* ---

SCOTT

28:55 So, you know, people in yellow or, are really scheduling the technicians, closing out jobs, you know, pushing through billing, stuff like that. Every everybody else that's on here, you know, I mean, I schedule I'm in service, right? Pretty frequently, but everybody else is kind of, you know, Andy's really 100 percent sales. Judy, is more administrative collections. Everything like that leases accounts, payable accounts receivable, and she'll create jobs like, you know, after, you know, when somebody accepts a quote, all that job creation typically goes through her, Maryanne, really accounts, you know, our controller and octavios, just or after. So he really goes there to get information in and out of jobs and then uploads, you know, plans permits stuff like that.

SKIP

29:43 Yeah, we...

ANGELO

29:45 Okay. Well, that helps out a lot. I think if you get that list over to me, you can simply just e-mail it. What I can do is add it to your account. That way we can stay aligned on that. It looks like the only thing that I really need to do on my end and I just correct me if I'm wrong. We're contracted for 13. So we just need to add one additional tick. The helpers can stay at 10. And then right now you're contracted for... you got TAM and I'll send this out and.

SCOTT

30:24 Yeah, I'd like to review. Listen, I mean, truth be told.

SCOTT

30:32 I, there's an inherent value in service trade to me, but to me, I still pay a lot of money, right? Because I went from paying nothing in 2017 for any of this to paying, you know, 31,000 dollars a year, for, this service, you know, it's probably helped me grow and, you know, everything along those lines but, you know, is somebody who went from paying zero to paying something, you know, we used to it's funny because in our industry, you know, we pushed repairing revenue that's what we do is an

alarm company. This is the monitoring accounts. Yet. Prior to going on ServiceTrade, we really didn't have anything we were paying on or basis, you know, we bought all of our software, you know, Microsoft acrobat, everything like that we bought, you know, perpetual licenses, and, you know, and now it seems like everything that we do has some type of recurring fee on there. You know, we're paying Microsoft every month to use office. We're paying a ServiceTrade, we're paying, a biller to, our invoicing for recurring revenue. ServiceTrade really doesn't do that well. We're paying Quickbooks for hosting. We're paying, you know, it all adds up and... you know, for me, I like to say, hey guys, you know, do something about my pricing because, you know, I feel like it's expensive and people are chasing me down. You know, I just asked you guys, you know, are fair.

SKIP

31:55 Well, how do you feel like we have been?

SCOTT

31:59 I think you have, you know, when I first started here, I was paying, you know, 7,000 dollars a year, you know, and I can't remember what we were getting, you know, when we signed on, I think, you know, like 1,800 bucks a month before tax, no tax. You guys didn't charge sales tax back end, which was nice. Well.

SKIP

32:18 Ally, you know, as a percentage of your, you know, revenue, the cost of service trade is, has actually gone down because, the idea is you get some economy of scale of a critical piece of, your text, you know, stack, I mean, you know, they have a truck but they have to use. They have, you know, all these sorts of things and the software becomes sort of a critical piece of, you know, critical tool of the trade, right? And, and hopefully that piece, is as important as a truck to them, right? It's it's what they carry into, their jobs. It's what they use to find repair opportunities is what they use to perform those recurring services, and hopefully it's generating more profit for you because there's an economy of scale to using service trade. So as a percentage of revenue, hopefully the service trade investment, is going down, you know, and you're getting some, you know, some benefit over time of it. So that's the hope at least is that you're seeing growth outpace.

SCOTT

33:28 Lost. It is, you know, I really believe that it's a, you know, it's an asset for us and... you know, would say it's a big, you know, it's been a big help and it helped us for over the years.

--- Pricing ends ---

SCOTT

33:42 And, you know, one of one of the things that's coming up for me. One of the things that's coming up from me, is that there's going to be a transition ownership of the company. So now we're going to be adding on some that we've never had before in terms of in terms of the transition and financing the company and everything like that. So, you know, we're going to become a little more... observant, as to, you know, as to the money going in and going out because everything is going to get tighter

right off the bat. But, you know, that's coming up. And hopefully, you guys can, you know, add that into your consideration, you know, and all of this and, you know, help me get through the next couple of years.

SKIP

34:31 Well, that's good, congratulations when is that happening?

SCOTT

34:36 Soon, hopefully within, you know, a couple of days, I think at this point, very near future.

SKIP

34:43 Is it a private equity type play or is it somebody coming in merging? Is it, is it?

SCOTT

34:51 No, I mean, myself and Josh are going to be assuming control of the company over a period of time. You know, we are, we are a large, you know, we have almost 40 employees at this point. We're still a small family on business funded by ourselves. And, you know, no, and nobody else, you know, there's no, you know, there's no big equity firm sitting over us watching us. This is, this is, you know, what we make of it, so.

SKIP

35:25 Cool. Well, obviously, you've been sorta running it, you know, for a while. So you get to be, you know, transition to that ownership role is fantastic. And, and so we're sensitive to this kind of stuff. We work with owner operators all day long that's one of the benefits of service trade, is in the DNA that Billy is inserted in. This, is helping owner operators, you know, build their companies and grow and understanding the business aspect of things from a cost and profit perspective. And so that's something that is rather unique to us in the industry is our sensitivity to that. So we'll continue.

SCOTT

36:09 One thing just out of so curiosity, do you have anything to share about what's coming down the pipeline in terms of, you know, in terms of service trade in general? You know, I mean, there's no, you know, I think one of the biggest... things that's mission the service trade is that, you know, a good accounting integration, you know, where, you know, and you know, a lot of the companies, that reach out on a regular basis, use that, as a, you know, as a hit on ServiceTrade. Is that, hey, you know, they don't have to account, you know, like, you know, they're you know, you're using Quickbooks, and, you know, it's kind of, you know, something that I don't necessarily disagree with, is that it's kind of clunky in that regard. Is there any, you know, is there any road map that is, hey, this is where, you know, this is what we're trying to do. This is where we want to go. You know, anything along those lines?

ANGELO

37:06 Well, we...

SKIP

37:07 Certainly recognize. I mean, we have probably 60 percent of our customer base using, some flavor of Quickbooks we've got. We, we are hiring subject matter experts on Quickbooks to help bolster our integrations. Are you all on desktop online? What are you on?

SCOTT

37:25 We're on desktop enterprise.

SKIP

37:27 Yeah.

SCOTT

37:28 We use the web connector and let's just make, you know, I have... sat in meetings with...

SCOTT

37:42 Intact. You know, I really like the connection between intact and service trade but, you know, they're showing me a good thing. Bad face. I've talked to, forgive me, I'm drawing a blank, but his last name is Scott from guardian. I, Scott... I, yeah, Scott aggie. I've talked to Scott aggie outside of, you know, not connected through ServiceTrade, actually connected through an insurance broker. I've had conversations with Scott and my last conversation that I had with Scott which is probably almost a year ago at this point was the fact that they were transitioning into impact at that point and they had paid a lot of money to a consulting firm to free that architecture. You know, it's very cool except intact another, you know, I, you know, I think ServiceTrade is expensive. Impact is like 70 grand a year or something like that.

SKIP

38:36 Expensive. And, and there there there's some other costs associated with intact that you know, you gotta kinda look into like API connection costs and things like that. They're coming out with and stuff. So, you know, you have to consider those things. And usually, when I talk to people about accounting integration, I ask, you know, what are you missing? What are you missing? That is sorta critical to your business operations that you need an accounting integration? Some of our competitors use that... and say, well, we got this or that, but I always ask the question, what is it that you need? That's that would be better having a good?

SCOTT

39:15 We don't have, you know, Quickbooks to ServiceTrade. Quickbooks is a one way one way path. So I would love to be able to see within ServiceTrade, you know, when stuff paid or, you know, like, you know, I would love to be able to be able to have that all in one place and not have to pay like, hey, you know, we want to go schedule this job. They put a deposit down on the job, you know, but we'll check the comments. You know, somebody had to take a check in Quickbooks. You know, why to the invoice, go, to the job in service, make a comment on the job and say, hey, you know, we received money on this where mark the job is paid or paid partial or, you know,

there's a lot of there's a lot of stuff going on behind the scenes to kind of make it all, you know, it's what we've been doing for seven years, you know, it's chaos except as.

SKIP

40:07 Well, the challenge with quick Quickbooks. Everybody has a set up differently, you know. So it's not a one size fits offer, for accounting integrations. But some of the themes that you mentioned are probably pretty ubiquitous when it comes to needs of our customer base. What would be really cool is if you could take the time 15, 20 minutes and just jot down your top five or 10 things that you would love to see as functionality in a, in an integration and send that over to Angelo. We can bubble that up to we, we've just hired a couple of people that are Quickbooks kinda experts. And, you know, there is a repository for, I'm sure you probably asked for these things before.

SCOTT

40:57 But I've asked for a lot of things before. I think the most important things that I've asked for that I made clear that I thought were important and still haven't happened. So, you know, I think my vision, and you know, I think you guys used to be able to do text messaging or something like, you know, like I think there's two things, that are really missing to me. And in one, is that we should be able to send a text message to somebody when we're in the room, easily, right? Except that doesn't happen, and, you know, and I think I had the conversation. I think Tim was part of the conversation at some point. He made it seem like text messaging is more of a residential service contractor.

SKIP

41:38 Not anymore.

SCOTT

41:38 Seeing, you know, like, do you wanna know what we don't deal with? We deal with maintenance guys on a regular basis, we deal with facilities managers, right?

ANGELO

41:47 Who, who...

SCOTT

41:48 Don't know how to use their smartphones. And if my tech could say, hey, you know, here's a text message as opposed to sending an e-mail that says, you know, here's a service link I'm in the route. You know, my Gmail is set up in terms of categories, you know, so like you could have inboxes for primary social updates for, and stuff like that and Gmail and all of my service rating emails go into updates, right? And just like everybody else, you don't get, you know, I only get notifications on things that end up in my primary inbox, not in my updates or not in my social or anything along those lines. So, I would actually just like to go look for this service line or be sitting in front of a computer to see this thing come through. And then the other thing is that, you know, with the ability to track the like, hey, I'm in click here to follow me, right? And I talked to uga and I know that there are some type of integration between azuga and service rate, except, you know, every time I talk to

against frustration on their side because it seems like, they want to make the integration deeper but they're not getting the assistance from ServiceTrade. You know, it's almost like ServiceTrade. Like here's, our API do what you want as you just like, well, you know, it doesn't necessarily work like that. You know, we would need, you know, some coordination in this process. And, you know, we would want you guys to tell your system, to somehow accommodate this. And we like, you know, maybe have them as for a GPS partner where whereas that integration is there and you guys are somehow reaping a benefit, you know, that, you know, they're paying you a fee to be able to provide that service. And they're paying and we're paying them a fee to be able to provide that service. But, you know, those two things in terms of the service aspect of it, not even talking about accounting or the things that I think are the, you know, are two huge missing pieces.

ANGELO

43:43 Say.

SKIP

43:43 That I was talking to Tim spin yesterday about azuga specifically and, he mentioned that he mentioned that, you know, he was going to be asking for a deeper integration within our product for azuga. Now, I don't know how long that will take but know that they have willingness to kinda work with us to make that sort of a part of the native product is a white labeled kind of thing. And, and it'd be nice to see something like that because there is a need and I agree with, your assessment there.

SCOTT

44:16 Yeah, we integrated telematics probably four years ago, you know, at this point and, you know, we never use GPS track and we have 20 trucks on the road. You know, now, you know, we use it regularly. It's always up in our office and we're always trying to figure out where our are, who's on the move and who's close to what, you know, and just to be able just to be able to, you know, somehow make that work with service trade as opposed to just having two tabs open, you know, bouncing from one to the other is fine because that's what, you know, bill's book was kind of like, you know, don't look for a one stop shop, you know, look for eight people who do eight things individually, well, right? You know, ServiceTrade is really good at tracking service, is our telematics or whoever is really good at doing GPS tracking, Quickbooks is really good at doing accounting. So, you know, instead of looking for one, you know, NetSuite or whatever it is called, you know, at all, you know, don't be hesitant to go out to eight different people to do individual things except it just gets funky, you know, it gets, very clunky.

SKIP

45:18 Yeah, no, I agree with what you're saying and, you know, it is challenging. Every customer has things that are hot buttons for them, but that is something that we hear all the time text messaging, making it a little bit more.

ANGELO

45:34 They're working.

SKIP

45:36 They're working on. The, one of the big projects over the next six months is schedule and dispatch improvement. So that's on our road map where schedule and dispatch, you know, the UI is going to be vastly improved. And so Angelo can probably get you teed up with a little bit of an overview on that as well as getting you some road maps. We don't send those out typically, to folks, but we could probably get you a peek into what's coming so that you can see what's happening. And then we can relay stuff. If if you do have time to jot down just a few things on the accounting front while we're getting these people up to speed, on, you know, stuff I'd love to relay that.

SCOTT

46:23 I'd love to talk about it. You know, I think that, you know, I think some of your competitors listen. I've never gone to market. I've never price anybody. I have no idea whether or not service tighten is cheaper than you guys are more expensive than you guys are exactly the same as you guys, right? But I've had farmers come to my house to use service site and I was like, wow, you know, ServiceTrade doesn't do that. It's very cool. You know. And, and, my only other thing that I think would be really good is that you guys are kind of... you know, I'm not a I'm not a working guy, right? I didn't you know, I'm not a mda guy or anything like that. And... you know, I think if service trade, you guys put people there to answer our questions, but we don't necessarily ask the right questions. So, if there was a, you know, sort of like a business coaching side or consulting side that went along with this, you know, somebody who said, hey, this is higher using service trading. This we should be doing or this is, you know, these are alternate things that you could be doing or, you know, we think that, you know, this would be a real big value add to your business. You know, having that resource somehow through service trading, maybe it's not through ServiceTrade. Maybe it's just find a consultant but, you know, I think having a consultant that is, you know, familiar with service trading on service trades team as opposed to, you know, as opposed to a free agent, you know, come in and look at it and know what they're looking at right away. It, would be really cool. And, you know, I think that would be something that would be, you know, that could be an investment worth justifying.

SKIP

48:04 I love that idea. I think that's a great idea. I've pitched something similar inside we've got, you know, obviously being able to have the business mind but also, the in the weeds mind. So here's how you use ServiceTrade but not too much in the weeds. More on the high level strategic front that set of people, is small and either it's like a Billy or it's an owner operator, that has graduated per SE, that has seen the movie, and can go and coach other people.

SCOTT

48:49 You guys have guys, that are that you're aware of? You know, you know, similar to somebody like a Scott age, who is out of the business now that they want to do consulting. You know, you know, I think, you know, I think you guys could probably place that pretty easily. You know, I guess my biggest that if you had that, I'd probably, you know, all the guys ahead probably be using it. You know, like Scott, you know, you can have, you know, you can have Ricki because this guy is now moved on to the offer to your clients as my TAM before I.

--- Next Steps ---

SKIP

49:26 Wow, west or Chris or Andrew?

SCOTT

49:33 It was west?

SKIP

49:34 West? Yeah.

SCOTT

49:35 I just got that as a shot on Ricky, but a little west came out to Philadelphia when we joined service rate to come to demos, you know, our office. So I've known west for a long time... and, you know, and losing less as TAM, was disappointing. But, you know, I think Rick's been great. But like I said, the TAM are there to answer your questions, you know, whether or not there to say, hey, you know, let's you know, this is what we should work on with you and, you know, this will be beneficial to you guys as a business.

--- *Next Steps ends* ---

SCOTT

50:07 Hey, you know, what do you need us to do? And it's you know, I, you know, like, you know, trove of data and, you know, I'm not quite sure what to do with it except for just continuing, to get by every day, and make sure that we, you know, out here doing the right thing and making our clients happy and... stuff like that. It's a text message really quick. I'm sorry.

--- *Pricing* ---

SKIP

50:34 No worries. Get run in a couple of minutes, but this is really useful.

ANGELO

50:42 There's only one other thing that we need to cover and that service forms, we have 10 contracted license, but we have 16 licenses and of itself, if I send you that list, is there a way that you can sorta kinda do what you did... earlier? Scott?

SCOTT

50:59 So, so I'm sorry, I just wanted to text one of my technicians. Can you say, man? I have 16 service license?

ANGELO

51:07 You got contract it, you have 10 service forms, licenses. Let me try to pull this up but we have 16 devices on here. I don't know if some of them are duplicates some.

SCOTT

51:23 On a phone on a tablet, I would tell you that... I'll have to get with Dan and Colby on who exactly is using service forms. I would think that I would think that I need to start. So like Lawrence probably isn't using it to a certain degree anymore. I don't use it at all. So, you know, but... you know, I'm not using it at all, but.

SKIP

51:57 We'll we'll send you the list and you just tell us, you just tell us and remove anybody.

SCOTT

52:03 I like to purchase a couple more of those, you know, that would be, that wouldn't surprise me, but testing game joins and Colby, all they do is, you know, is create forms and work from the office side. So in terms of one, two three, you know, if you take Dan and Colby off the list, you know, that's down to 13.

ANGELO

52:23 Yeah. Do you want me to? I'll send you a list. I wanna make sure it's accurate. And then you just tell me, hey, it's 13 and then I'll add those. And then I'll send you, the renewal numbers and we should be set. Everything else is good to go. We should be set on that and this is the last thing we need. And then we should be set. We'll get you those numbers, get your renewal done, and then bubble up that feedback that Skip talked about to me in any type of form of e-mail or if you want to get on another call, we can do that and we'll go from there.

SCOTT

52:52 Yeah, I'll review what you guys send over, and, you know, absolutely we'll you know, we'll have that follow up conversation.

SKIP

53:01 Thanks for the feedback Scott on TAM and stuff by the way the TAM team, is now reporting to me through, Chris, Asia the director on that team but they roll up to me. So I love the feedback on business consulting and kind of a kind of an Uber level, of consulting this beyond, you know, just, you know, hey, what do you wanna work on, you know, more insightful actionable. You know, type things where people can look at the business and make suggestions.

SCOTT

53:35 Like, you know, like, I mean, probably, you know, hundreds of people like me that don't have dashboards because they don't know what they would even be like. Like listen, I know what I'd be looking at, but like, you know, in reality, you know, I always say that, you know, we've been doing this. I've been doing this for 15 years now. I just have my finger on the pole. I can tell by the type of jobs that are coming in deposits that are coming in and, you know, and the leads that are coming in whether we're healthy or not. Yeah, you know, and that's really the extent of the analytics that

we've taken in the past. You know, you know, we go back and, we dive in a little, but, you know, we really say, all right, you know, we dove in. Now, we gotta get back to work and make sure that we can continue to stay... you know, on this path because, you know, we stopped doing what we're doing or even a second, you know, really screw everything up absolutely.

SKIP

54:25 Yeah. So, good. You know, given me a lot to think about. So, thank you.

SCOTT

54:31 Alright. Thank you guys. Okay.

ANGELO

54:33 Well, have a great rest of your morning. I'll get you.

SCOTT

54:35 E-mail thank you so much.

SKIP

54:37 I see you bye.

The End