



ServiceTrade Follow Up Meeting with Elite Electrical Contracting

Susan Warren with Elite Electrical Contracting
Recorded on 9/20/23 via Zoom, 1 hour 3 min.

Participants

SERVICETRADE

Susan Warren
Territory Manager

Jason Wilson
Tier 1 Manager

ELITE ELECTRICAL CONTRACTING

Bobby Davis
Owner Operator

OTHER

Cooper Hart

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Transcript

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

SUSAN

0:03 Hey, Bobby. How are you?

JASON

0:05 Pretty good. How are you doing?

SUSAN

0:06 Good, good. Nice to meet you. I'm Susan Warren.

BOBBY

0:10 Good to meet you. I got Cooper sitting here next to me.

SUSAN

0:13 Nice. Do you guys have a camera, love to put a face to a name? If not absolutely. No pressure.

SUSAN

0:24 You...

BOBBY

0:27 Normally, I have my video on.

SUSAN

0:30 Hello?

BOBBY

0:32 I've...

SUSAN

0:32 Also, I've also got my manager, Jason on. He just joined us. Want to introduce you to, we've got Bobby here and we've also, you said that was Travis with you?

BOBBY

0:44 You, Cooper?

SUSAN

0:46 Cooper. So we didn't have cameras last time, so I was just like, I can't...

--- *Purchase decision* ---

BOBBY

0:51 So...

SUSAN

0:51 Does he look more like a Cooper or Travis?

BOBBY

0:54 I...

SUSAN

0:55 Could make a game, TAM goal?

BOBBY

0:57 I...

SUSAN

0:58 I really appreciate you all taking the time and hopping on basically, you know, the game plan for today. If it sounds good to you all is kinda wanna start off kind of recapping and level setting from the initial meeting that we had before. And then you just kinda find out where you're at specifically in the process, Bobby, you know, in terms of, you know, what you reviewed, what questions you have, et cetera. I can go over any areas that you wanna see, address all of those questions and then we can talk next steps the end. Does that sound good?

--- *Purchase decision ends* ---

BOBBY

1:32 Yeah. Okay.

SUSAN

1:34 Awesome. So, yeah, to kinda recap my notes and if I say anything that is incorrect, definitely let me know. But, you know, walking through what we talked about last time, some of, the things that we're hoping to solve for that took note of, you know, we're wanting to find an effective accounting integration, you know, finding a way that we can, you know, send out invoices from the field.

--- *Access to information* ---

SUSAN

1:58 You know, currently guys mentioned that, you know, kind of dealing with just using a mobile website as opposed to, you know, not a true mobile app. So, you know, getting ease of use for the technicians is definitely top of mind. You know, it mentioned that there were kind of too many different ways to do the same thing.

--- *Paper process* ---

SUSAN

2:15 And sometimes that leads people down confusing paths with, you know, sometimes incorrect information on things. A lot of things you have to remember when you clock in clock out issues with change orders, just generally getting from point a to point B is kind of an issue. And then in terms of, you know, what you're hoping to achieve with a tool like this, you know, just make it faster for technicians to get their work done in the field.

--- *Customer engagement* ---

SUSAN

2:43 Fewer phone calls in the office, easier training for employees, text is generally more centralized information. I remember customer experience was really top of mind, you know, fewer delays in getting quotes, invoices, work acknowledgements out and making sure the quality and accuracy and information is good on that. And then some other pieces that I had on there be nice to have a pro core integration down the road.

--- *Customer engagement ends* ---

SUSAN

3:12 Of course, you know, ease of use around scheduling is important. We talked about, the customer portal would be really nice. And then basically just addressing all of those pain points from there, what did I miss? Or what did I get? Incorrect?

BOBBY

3:35 I don't know at least from what we discussed last time that pretty much covers it. Bobby may have some additional questions. But yeah, as far as what you travel in, that pretty much covers.

SUSAN

3:50 Very good. Well, I turn it over to you, Bobby, kind of what have you know, what have you reviewed since my conversation with them? And what questions do you have? And what do you need to see?

BOBBY

4:02 So, to be honest, I didn't even get a chance to review it... but... yeah, a lot of it is, you know, pretty consistent with what they were saying, I would say myself personally probably has the best idea as far as how our existing software works in each department because I've been here since the beginning when we started using that and I've done a little bit in every aspect of it where, you know, some of the guys

are, you know, they're just doing quotes or somebody's just doing invoicing, or just, you know, just doing scheduling or whatever. So, I know some of the guys, you know, I probably have a lot more questions and, are a lot more skeptical when I start seeing how things are working because...

SUSAN

4:51 You've seen.

BOBBY

4:51 A lot more through. I counted it up. I've been through like six different management softwares. So not just with this company but other companies I've been with and things like that.

SUSAN

5:06 That definitely, well, you know, I am happy to walk you through whatever components you would like to see today. I mean, I've got a sample job pulled up. You know, I can take you through really whatever parts you want to see. I can walk you through a whole sample job and show you everything if that would be helpful. But you tell me?

--- Paper process ---

BOBBY

5:27 Yeah. I think one of the things I'm usually concerned about the most, is quoting. I know you would talk about other things as far as.

BOBBY

5:36 That was that the same point?

BOBBY

5:38 You had using ServiceTrade for quoting right now?

BOBBY

5:44 Yeah.

BOBBY

5:44 Okay. Yeah. So the big thing is quoting versatility and quoting... because I know like... programs I've had in the past didn't have, you know, they were not very versatile at all with quoting.

--- Paper process ends ---

BOBBY

6:03 The one we have right now, I would say, is pretty decent as far as being able to make adjustments that you want to make because I know there's some that, you

know, you put the pricing in and it kinda locks it in.

--- ST app contracts and pricing ---

BOBBY

6:12 So if people are bidding something they can't make certain adjustments as far as on the margins or labor factors or anything like that.

SUSAN

6:20 Gotcha. So basically, you know, once it's so a lot of flexibility during, the quote creation process, what other pieces are you looking for around that?

BOBBY

6:32 You know, making sure it would have a catalog that integrates with it, things in that catalog. You know, is there assembly prices with that catalog? When you're creating an assembly price? How's that, how are those materials and labor rates or labor factors? You know, how are they flexible? Then, you know, you get onto the catalog. Can we use those assembly prices when we go to Bill out as well? So, if we're doing invoicing fields, can we take that, you know, price that's okay, add a plug. And you just, this is our flat rate for that basically.

--- Tech time tracking ---

BOBBY

7:07 So you build that out versus having to Bill out at an hourly rate because when it comes to doing, you know, residential service or residential work that's usually the most efficient way to do that versus.

BOBBY

7:20 You were only here for an hour while you.

BOBBY

7:22 To a half hour to get your half hour to get back. So.

--- Quote templates ---

SUSAN

7:25 Yeah, I remember us kinda going through that. So in terms of, you know, functionality the way that most folks do that. So, you don't deal with the questions of like, you know, sending over a super item as quotes and invoices of like this says, you know, this includes three hours of labor and I, you know, let me pull up my ring cameras and I like that kind of thing.

BOBBY

7:47 Yeah.

SUSAN

7:49 So, so it's really easy in service trade to set up that. I believe there's 12 different ways you can display items on quotes and invoices to the end customer. So that's kind of the, my recommendation is, you know, you can either have a grand total for example, or you could have here's a total cost for labor here's, a total, you know, for parts, that kind of thing.

--- *Type of work* ---

SUSAN

8:15 So that's how our customers do that. And, and just to kinda clarify just, you know, making sure I've got, my notes correct? Still about 20 percent ish, residential. Is that accurate?

BOBBY

8:31 Yeah. I'd say we're about of that right now we just hired on a residential specific electrician and trying to dive a little bit more back into the residential just because we're looking at it as helping a cash flow a little bit on some of these bigger jobs... for sure.

--- *Quoting* ---

SUSAN

8:52 The end of the day, we're not looking to like flip flop those numbers or anything be like 80?

BOBBY

8:56 No, no, no, no.

SUSAN

8:59 Perfect. So, yeah, happy to go over job high items. How that's kept up with I'm thinking a good way to demonstrate the kind of the quoting process to show you what it would look like for someone to find a quoting opportunity out in the field, report that from the field, have the office review it turned into a quote and send it out so on and so forth anything else that we'd like to be sure to check out?

--- *Invoicing* ---

BOBBY

9:31 Yeah. Maybe the, you know, what you guys would have as a field invoicing process, like what I was talking about, whether it's invoicing for a bid that was already created and they did the work because once again, like I said, we're trying to, you know, help our cash flow a little bit with the residential. So part of that is collecting on site so we can get that money in as quick as possible.

--- *Purchase decision* ---

SUSAN

9:53 Absolutely happy to go through that before we jump into that. I know you'd mentioned, you know, in terms of other options that you're looking at, the only other place you were looking at back then was BuildOps, any other places that you guys have demoed between now and then?

--- Accounting integrations ---

BOBBY

10:14 No build off has been the only one I know prior to you, it was pro core. And then when we got to talking to pro core about service work, they were the ones that really recommended you guys because you integrate with them. But yeah, other than that, it's been you guys pro core.

--- Purchase decision ---

SUSAN

10:31 Gotcha. And, and just in terms of decision making, you know, process and, you know, let's say, hypothetically I walk you through all these various components and you're like, yes, this is addressed. All of my gotta haves and nice to haves, you know, what would happen next on your end?

--- Purchase decision ends ---

SUSAN

10:51 Is there anybody else that you would need to check out? Or how are you planning to come to a decision?

BOBBY

10:58 There's yeah, I mean.

BOBBY

10:59 And there's not really.

BOBBY

11:00 We...

BOBBY

11:02 Be running some of the stuff by like our bookkeeping and basically making sure they're looking, you know, they like the way everything integrates Quickbooks.

--- Purchase decision ---

BOBBY

11:15 But as far as that goes, I mean... we're kind of in a hurry but we're not in a hurry type of thing. So, I mean, I don't know, I picture a decision being made in fourth quarter this year.

SUSAN

11:30 Okay.

BOBBY

11:31 Pretty much right at the tail on the third quarter anyway. So.

SUSAN

11:35 Exactly. No, that certainly makes sense. So, very good there. All right. Well, let's kinda just go ahead and jump into it. So... probably the easiest place to do would be to start off kinda give you a high level overview here. So go ahead and share my screen.

JASON

12:03 Well, she gets set up.

--- *Purchase decision ends* ---

JASON

12:04 I did have a question. Nice to meet you guys. By the way. I had a question, Bobby you mentioned that you have kind of evaluated, you know, a number of different softwares in the past. I guess what, what's kind of been some things, that were things that the softwares didn't have that kinda held you up?

BOBBY

12:25 So, like what?

BOBBY

12:26 We're...

BOBBY

12:26 Using right now, it's, the field stuff isn't really as great as what we would hope, you know, we don't have the capability of being able to do some even just basic residential quotes from the field or even a basic commercial quote from the field for small things as well as we don't really have the capability of being able to invoice from the field very efficiently or easily... the program I used before that, their quoting was a big issue.

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

BOBBY

12:59 As far as it was like, you know, when you're coming up with like, a unit price. Okay? This is the price to add a plug or to replace a plug. It was kind of you put, your price in there. Okay? We wanna charge 50 dollars for that.

BOBBY

13:14 And...

BOBBY

13:16 That there was no way of that, it integrated with anything else as far as. Okay. Now we updated all of our pricing on our materials, you know, receptacles went up and they doubled last year or whatever. You know, there was no way that it automatically adjusted those assembly prices. You would basically have to go in and hand calculate all those assembly prices that happened to potentially, you know, factor that material into it. You know, there was, there wasn't even a material list associated with that assembly price... trying to think what I was using before that.

BOBBY

13:59 Now I'm trying to now, I'm having a hard time. I sat down one day, cap came up with like six of them I do like. But.

--- Accounting integrations ---

BOBBY

14:10 The other one was... some of them were pretty basic... but some of... I was just thinking of quoting. I don't... know, I know whenever I've quoted in like Quickbooks, I've always found their quote or their estimation portion to be pretty good. However, you know, we use Quickbooks desktop.

--- Accounting integrations ends ---

BOBBY

14:40 So it's a little difficult to, you know, integrate that out into the field. And, you know, you start paying per user just to be able to do quotes. Doesn't necessarily make sense as well as it doesn't have a schedule board on it or anything like that. So.

SUSAN

14:56 A little bit limited there, that definitely makes sense.

--- Access to information ---

SUSAN

15:01 But what you're seeing right now, this is the office view of service trade. This is a work order from the offices perspective.

BOBBY

15:10 And...

SUSAN

15:11 We'll kinda walkthrough this as well when we go into the mobile side and we, you know, report that efficiency, but do just want to briefly touch on, you know, how we kind of keep information organized over here.

--- Recurring maintenance ---

SUSAN

15:24 So, this is a location page and service trade. So any time there's an issue internally or externally that's going on at this particular location, this is really your main hub. So you can go right in here and see all, the active services that are going on. You can see, you know, of course, you know, all of the jobs that this location, previous quoting opportunities.

--- Assets ---

SUSAN

15:48 This is really nice because this is available on the mobile app as well. You can see the full asset history for each of these at this location and make any adjustments to that. Any previous quotes, of course, any sort of comments attachments there and it's all just kind of organized, in a central place.

--- Assets ends ---

SUSAN

16:10 And I was getting the impression that this is a little bit more organized than how things are currently with the tool that you all are using.

BOBBY

16:21 Yeah. They don't have anything for assets as far as what we're using right now?

BOBBY

16:26 Now or?

BOBBY

16:27 Anything for it looks like contracts. So, is that service contracts as well? I'm imagining?

--- ST app contracts and pricing ---

SUSAN

16:34 So the, these are pricing contracts. So yeah, so this is all, you know, I've created this special pricing contract. I could use this across whatever customers that I want.

But in this case, this is saying the default pricing contract for the night for all the crispy creams is, you know, Susan's pricing contract. And this, do you wanna speak to this because it gets kinda tie in to... some of the things you were mentioning earlier. So this has a twofold purpose. One, it's going to auto automatically calculate your pricing for you because we go into these rules. You know, you can say, you know, no matter what this gets this percent mark up or this always cost this. But then you can have the tiered pricing rules saying this is the margin that we actually wanna charge. And of course, there's additional, you know, ways that you can have things set up by default so that's half of this purpose. The other half is, this is a great way to track the profitability and the timelines for your plan maintenance agreements. So in this one, you know, this is let's say I'm using this, I could use this, you know, for a specific plan maintenance agreement and it's of course valid until this date and it's going to help me track my actual margin and then, the invoice revenue today there. So that's how we would be generating that. How are you guys calculating pricing now through excel or how's that getting done?

BOBBY

18:09 As far as... what portion of the pricing are you referring to? Are you?

SUSAN

18:16 Like like the markup compared to the cost?

BOBBY

18:20 So, right now, our estimator... has a place where you put the cost in and then put what, you know, you can select like our default margin on it or you can, you know, adjust it to whatever you may want it to be. It calculates it within the program? Okay?

--- *Type of work* ---

SUSAN

18:46 And while we're here, I'd want to talk about and just make sure that this will be in alignment with your goals, the way that we do job items. So, you know, we serve a vast array of, you know, different folks different, you know, industries, it's all folks that, you know, do primarily commercial service.

--- *Quote templates* ---

SUSAN

19:08 But due to that diversity, we philosophically want to put the job items as much in your hands as possible while making it as easy as possible for you guys to make edits to that as you know, of course, prices change. So, the way, that gets done is through our job items area.

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

SUSAN

19:29 So we go in here and go over to items. You can, of course, you know, create items one off... but, you know, let's say all of your let's say all of the acne, parts have increased in cost by, you know, X percent. It's really easy to go in and upload that updated list.

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

SUSAN

19:54 So you don't have to go in one by one and make any sort of changes. So, you know, just wanted to be clear that, that's how that gets managed. This is everything. This is parts, this is equipment, this is labor, you know, where you're providing whether that's in bulk or individually, that code the description, the service line, the cost vendor, all of that as opposed to pulling from some sort of third party vendor. So that's how we would be managing that. Is that something that you feel like would potentially suit your needs?

BOBBY

20:30 Yeah. The only question...

JASON

20:31 I have.

BOBBY

20:32 On this one.

BOBBY

20:32 I guess is.

BOBBY

20:34 Is there a way to do categories on this? Like you say, what do you have one inch black pipe, 90? I'm assuming that's like a.

BOBBY

20:46 Back in 90, you know? So if you had a, you know, okay, this is all of our iron pipe fittings in this section, you know, all your emt and you can click and open each one of those folders versus search each individual item or scroll down through a list?

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

SUSAN

21:03 So a few ways we could handle that, we've got our types. This is a very broad apart material labor et cetera. And then you also can organize by service line. So, you know, this is something that's used for electrical. This is something that's used for this type of refrigeration or this type of hvac blah blah blah.

--- Accounting ---

SUSAN

21:19 So you have all of that. But if there, if you wanted to create some sort of category, you know, that's outside of those parameters, the way most of our customers do that is to use the item code for categorization, well, that's a lot of syllables. And that way, you know, for example, like let's say PL was some sort of category.

--- Parts management (inventory) ---

SUSAN

21:41 You could then just search for PL, and then all of those items would appear there. But yeah, is this feeling like this could work in terms of parts?

BOBBY

21:54 Yeah. I think one of the other programs that I had that I had used previously, we ended up doing that as far as like you're saying put, you know, at the beginning of it. So, you know, like all your emt but emt at the beginning of all of it.

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

SUSAN

22:09 Exactly. So that's how we would do that. And like I said, it's you know, super easy just to, you need to create an item individually. You can do it like this. You can even indicate if it's taxable or not, for whatever reason, put all these parameters in here.

--- Access to information ---

SUSAN

22:26 So that's that. So let's head over and see what this job would look like. From the technicians perspective. We can report a deficiency and walkthrough the quote. And then we can also talk about the capabilities of sending an invoice from the field.

SUSAN

22:48 Stop sharing here... share.

SUSAN

22:57 The screen.

SUSAN

23:13 Here. So this is our mobile app, get myself out of the way here... and give me one second. I had set up a, an alternate count and forgot that I had logged out of that... main one.

SUSAN

23:45 There we go. So this is what it would look like when you log in to, you open up service trade for the day we've got that single appointment on there. Of course, this would have everything that was assigned to that technician for that particular day. So we'll go in and take a look at this job.

--- Assets ---

SUSAN

24:05 Got all your, you know, usual clock in clock out functions, all of that you can access, you know, like I mentioned that all of that asset history from there, go in review, job items... attach, any sort of, you know, photos, videos, etcetera, any sort of comments, anything like that.

--- Tech On-site ---

SUSAN

24:27 Of course, you know, you can go in and review what's expected of you at that visit and you can have multiple services and multiple assets on this particular appointment. And so the first thing you probably wanna do just in terms of process, you clock in as being in route and if you want to, you can send that notification to the customer... just letting them know what time they'll be arriving. And I'll come with a technician headshot and name, but we'll go ahead and clock out of that and clock in as being on site. Again. Another time in GPS stamp is being taken here. But let's talk about what it would look like to report a quoting opportunity from the field.

--- Deficiencies ---

SUSAN

25:14 So to do that, we would just head over to deficiencies... and that's gonna show you all the existing deficiencies, we'll go in and add a new one and let's say it's a broken compressor.

SUSAN

25:34 And we usually found the sweet spot for getting quotes, approves like four to five different media items. Are you guys usually attaching media items like photos videos to quotes right now?

BOBBY

25:45 It depends on the quote. Travis does all the hvac stuff. So I don't know, what he would normally attach necessarily. But... yeah, it depends on the quote. Most time, you know, if we're calling out, I'm getting something with light fixtures. We're calling out a specific light fixture times, we'll attach the cut sheet for that light fixture in that.

SUSAN

26:09 Gotcha. So I'll just go in here and go ahead and take a photo. We'll pretend like my microphone is my broken compressor. Of course, they can add descriptions all of that. There. It's just gonna ask us how bad this is. Let's say it's making it an operable. We wanna keep this nice and organized. So we're going to select, the asset that is experiencing this issue and this is a new deficiency. And if they want, they can add a proposed solution here. This is not required.

SUSAN

26:50 And as soon as I hit that save button, the technician has done everything they need to do from their end to trigger an e-mail that will then be sent to whoever is going to create that quote in the office. So let me show you what that looks like.

SUSAN

27:15 So that... will e-mail will take you to this page, this deficiency page. And the person in the office is just going to review this... look at the attachment, see whatever comments were put in. And from here, after reviewing it, they can just go in and click add to quote. We'll just put an expiration date on there. We're gonna convert this into a quote.

--- Quote templates ---

SUSAN

27:49 And, you know, it's just carried over the information that we had keyed in. But let's say replacing a compressor is something that we do fairly often. We can go in and use a quote template. So this is really nice. And just also know that we have the same type of template available for services as well. And I'll show you what that looks like. So we'll grab that and it's just gonna carry over that description that you have as well as the commonly used parts and labor. Of course, you can go in and make any sort of tweaks to this that you'd like. And then you can go in. And as we talked about, you know, this could be set up for grand total only if this is an stance where we don't want everyone to be picking apart how much labor it was and how much was this, how much versus that? And then googling things, whatnot, but if you did want a lot of detail on there, you can go in there with line items with prices, whatever you would like to do there. It's always gonna show you the gross margin internally only, of course. So we're just gonna review that. We can see our pricing roles, you know, converting the cost into a price here. And we can go ahead and here and click save... before I show you what that final last quote looks like. Is there any other manipulations to the quote that would be helpful for you?

--- ST app contracts and pricing ---

BOBBY

29:16 I don't think so. I think that was...

SUSAN

29:19 Good. I'll keep in mind I've got it set up for line items with prices right now. But just know that all those various categories that we talked about of just having a single

dollar amount for, you know, type or have a grand total that's all possible here.

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

SUSAN

29:32 So we'll go in here and we'll click send a customer. It's got our photo carried over there and I'll show you what that looks like. Another nice piece is if you need that extra layer of accountability for your technicians, you can click require po for approval. They have to key in a po number in order to click approve if you want.

SUSAN

29:59 Let me show you what that would look like. So, this is a quote and service rate. It's got your brand front and center description laid out the way you want, same thing with the parts and labor items laid out the way you want. And perhaps most importantly, we've got photos videos voice, mos documents, whatever it's going to demonstrate the importance of getting this done and approved quickly your TS and CS. And after reviewing all that, of course, you know, they can click in, see a bigger version of that picture. They can just go up and click that nice big green approve button. What do you think your customers would think of getting a quote like this?

BOBBY

30:42 I mean, to be honest, it seems kinda laid out like our existing one. I mean, as it has a clean header on it, your terms and conditions at the bottom? Yeah, I don't know.

BOBBY

30:57 I would assume terms and conditions would just be altered inside like a setting.

SUSAN

31:05 Yeah, you can go in and update those as needed.

BOBBY

31:10 Seems like every time we turn around there, it's just getting more and more verbiage.

--- Quoting ---

SUSAN

31:15 Turns into like a full legal document sometimes.

BOBBY

31:18 Yeah, yeah. So.

SUSAN

31:22 But yeah, you all, you know, the space to play around with that. So all that would be right there. And so from there, they can just go in and click approve. But I guess, you know, outside of what the quote really looks like, you know, thinking about kind of that process of, you know, seeing the issue in the field and turning that into a quote.

--- Quoting ends ---

SUSAN

31:44 Do you feel like this would save a bit of time compared to the way that you're currently doing it just looking at that workflow?

BOBBY

31:50 I think it would help with not dropping the ball because I think right now, you know, it's, we have nothing internally to communicate for a service call that, hey, I need a quote for this?

SUSAN

32:05 Exactly. And the other nice thing is you can go back in here and just review all of your outstanding deficiencies, so you can run like a weekly check to make sure that no deficiencies that were reported got missed. And just know that entire process that I just did, you can absolutely do that same process, you know, apply the template, make adjustments, all of that from the mobile app.

--- Paper process ---

SUSAN

32:38 So, you know, for the, I would say most of our customers, the vast majority of the time are following this workflow. But as you mentioned, sometimes you do need to quote from the field and it's just in a mobile friendly format, to go through all of that. And then the other nice piece with quoting again, you know, thinking about things falling through the cracks is with our premium plan.

--- Quoting ---

SUSAN

33:03 The ones that we were looking at for you, there is automated quote reminders baked in. And then if you just want to run, for example, I don't know a weekly report on quotes that are coming up. Do same thing with invoices. If you want to run that report as well, you can see all the outstanding ones and then just be able to click on whichever ones you want to notify about and send a friendly reminder. Is that something you guys are currently doing like running reports on outstanding quotes and invoices?

BOBBY

33:34 Right now, as far as we can toggle, so we go to our quote or invoice page and we can toggle... and outstanding quotes. You're saying outstanding like we haven't got.

SUSAN

33:50 For someone to approve it. Yeah.

BOBBY

33:53 Yeah. Right now, we haven't been doing a whole lot of that. I would say it's more like we're trying to keep up with the amount of quotes that we have versus following up.

--- Quoting ends ---

BOBBY

34:07 It kinda depends on, you know, how high profile of a project is or how much we want the job. We kinda remember it. And then as far as invoices... we go to our invoice page and we can click a toggle that will separate all of the ones that have not been collected yet.

--- Customer engagement ---

BOBBY

34:26 And you can see which one, you know, when they were all build out. So, you know, anything over 30 days, you start pestering saying, hey, we haven't gotten paid yet.

SUSAN

34:36 Exactly. And going back to your comment that you made about, you know, quoting, is like you kinda remember the big ones but you feel like you're so there's so much work to be done that, you know, it's hard to even think about like, well, let me go ping people about outstanding quotes, like philosophically that's something that, you know, service trade customers are really actively trying to do is, you know, because like skilled labor shortage, everything that's going on just generally in the world, our most successful customers are the ones that are able to get pickier about the types of work, they actually do, you know, like being able to not just, you know, quote out everything, not just, you know, run as soon as the phone rings, but being chooser about the types of customers, the types of work that you're doing just so we can do higher margin work for, you know, kind of a better customer for lack of a phrase.

--- Customer engagement ends ---

SUSAN

35:30 So kind of philosophically that's kind of what we're geared towards is setting you up for success with that. So... but, that was quoting, let's head back to the field and I'll show you what it looks like to finish this job in the field and I can show you what it would look like to send an invoice from the field.

SUSAN

35:59 So back here... share my screen.

--- Deficiencies ---

SUSAN

36:16 So, and from the technicians perspective, we've just, you know, reported that deficiency... and let's say we, you know, we go in, we review those services. We've done everything we need to do. Let's say, you know, we go in and, you know, add some sort of before and after picture. I will pretend like this highlighter... is a photo.

SUSAN

36:52 Reported that efficiency and let's say we were, we're ready to go ahead and send an invoice to the customer. This is an instance where we want to do that from the field. And before I show this roughly how often, you know, in a perfect world, you know, six months from now, what percentage of the time would you be invoicing from the field as opposed to through the office?

--- Type of work ---

BOBBY

37:16 I would say, you know, you're looking at probably 50 percent of any residential work, which obviously, you know, residential work is 20, yeah, yeah.

SUSAN

37:29 Gotcha. Perfect. So let's okay. Let's say that is the situation. So, unsurprisingly, you would be able to go in here and generate an invoice... through here.

--- Access to information ---

SUSAN

37:43 It's just going to ask you which contract do you want to use? A, a, you can click in here and see these are your items. Of course, didn't really dig into that on the mobile app side, but it's super easy to add or edit, the job items from the mobile app.

--- Access to information ends ---

SUSAN

37:59 You can go in, select from that database that we initially saw... and you can indicate where things came from. All with reporting. If you have additional questions that after this, more than happy to do a deep dive on that. And so we've reviewed these items. This is what we want to invoice for. And this is another piece we want to go in and you can set the default for this to be different. But, you know, if this is a residential, we don't want them like bring camera all that kind of stuff. We can go in and change this to grand total only.

--- Invoicing ---

SUSAN

38:34 So all that's looking good. They can add any notes that they like. And from here, they would just click finalized invoice. Are you sure you can't edit it after this or we're trying to do this? Yes, we are. And so the invoice has now been finalized, we can go back to view it and from here, we can just send it out.

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

SUSAN

38:57 I'll send it to myself there. Sure. Yes, I am. And then the invoice is sent... now in terms of kind of what happens from here, this is going to trigger an e-mail and I'll I'm happy to show you what that looks like to the end customer, whoever they selected to receive that. Basically, there's going to be a big green button that indicates pay now. So let me go in and grab kind of a random invoice. I'll show you what that looks like.

SUSAN

39:37 Nope. Don't want that.

SUSAN

39:53 Waiting for my internet. Okay? So let me show you what that invoice looks like.

SUSAN

40:02 That, I grab the incorrect one. I apologize. This is an older one. But if I grab the one from that I just sent, it would just have a single grand total on it. As you can tell, I kind of repeat the same thing over and over again. But, yeah, imagine a grand total and it just, you know, has service total plus tax separated out. So this is an invoice. They can click that big green pay now button to pay. And from there, they can, you know, enter an AC H or credit card... and go go ahead and get that taken care of, you know, while the technician is out in the field. So that's super easy to do. But the other nice thing with our invoices is we go into service details... you can go in and review, and of course, you can have these defaults, some of them turned off. If you don't want them seeing individualized parts, labor, and items that can be set up to be turned off. So they can't see that. And then they could go in and review all of the comments, attachments, etcetera. Yeah. Would that workflow work for field invoicing?

BOBBY

41:13 I'm not 100 percent sure on. Yeah, because that, that's still generally when we submit an invoice, we would itemize everything out.

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

BOBBY

41:24 Or like I was saying, if we did like an assembly price... where it seemed like you were doing an invoice just based off of the labor fact, is that correct?

SUSAN

41:38 So, the only thing that can like, the only thing that can be on an invoice are various job items.

--- Quote templates ---

SUSAN

41:48 And so if you wanted to, you know, you could create a job item that does, you know, whatever you want to do or you could have it set up to just, you know, have all that information and then display grand total only in the description articulating. What that is.

--- ST app contracts and pricing ---

SUSAN

42:04 I do want to be very upfront that there's no way to bake in skews within skews. So, for example, if you had a skew, that is, you know, let's say it is, I don't know a lighting service of, you know, making something up and that lighting service you want to charge the end customer 300 dollars for that. And that has like a separate code. There's no way to have within that code, you know, the four skews, like one for labor, one for the, you know, circuit one for this other part, so on and so forth. So you can't have like nested skews, the way that some flat rate is done, it would have to be through either creating an individual job item or it would have to be through display and grand total only. Does that make sense?

--- Quote templates ---

BOBBY

43:00 A little, a little fuzzy still, but.

SUSAN

43:08 Because, I guess like let's see. I'm trying to find, let me get back here.

SUSAN

43:20 Okay. So like for example, this was set up to line is with prices if I change that to grand total only... and then click save.

SUSAN

43:36 This is how you would hide for example... the individual items and of course, you could go in and add a description of what was actually done on there.

--- ST app contracts and pricing ---

SUSAN

43:50 But, you know, sometimes people, you know, they need to say like when, you know, for like back end reporting that when we go out and have this particular job item on there and it cost 300 dollars, you know, within the back end of the system, it

knows that like that's four hours of labor, a circuit, a widget and a spark plug... is that what you're needing? Or are you just needing to like keep customers from seeing that information?

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

BOBBY

44:25 Well, it's...

BOBBY

44:34 You... yeah, I think so.

BOBBY

44:40 Okay.

--- ST app contracts and pricing ---

BOBBY

44:52 Explain it to me again. And I'll see if I can translate. So basically, like right now, if we had one of our assembly prices, I just not.

BOBBY

45:03 This correctly, we have one of these, one of our assembly prices and the guys out in the field, go and pull that price up, add it to the job or is...

BOBBY

45:15 Something... okay? So then.

BOBBY

45:19 Then it basically displays that as the line item, not necessarily labor hours.

BOBBY

45:25 Material. Yeah, I saying in order to put it on an invoice, it'll either have to be a job item, but that stuff broken down inside of it or it would.

BOBBY

45:43 The whole job?

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

BOBBY

45:44 Yeah. And then you break down everything... but I think.

BOBBY

45:49 By hours?

--- Pricing ---

BOBBY

45:59 10 plugs or whatever, you know, their factors at a half hour piece or 15 minutes piece or whatever your technician that's on site can do them in five minutes piece, that's where you start making money, but you don't wanna, you don't want your customers to see that there is only that you factored 15 minutes piece. I need it only five minutes.

--- ST app contracts and pricing ---

BOBBY

46:20 Piece?

SUSAN

46:22 Yeah. And it would be my recommendation to do this by, you know, only displaying totals for categories or grand totals because if you had like all of this, you know, if you just created a single job item that encompass everything, you would not be able to track how much actual labor you use, how much, you know, in this case, how much refrigerant, how many filters, so on, and so forth. So, this way keeps it reportable in the back end, but you're not running into the challenge of those residential customers wanting to debate you on number of labor hours.

BOBBY

46:58 So, if we were to roll that in job item, can you set like a quantity of job item? We have a job item like replace receptacle, and then we could do a quantity of seven so that it multiplies everything in that job item by seven and contribute that on those jobs?

--- Type of work ---

SUSAN

47:19 Yeah, you can do whatever quantities you would like.

BOBBY

47:25 Okay. Does that kind of make sense to the workaround?

BOBBY

47:31 Yeah, some white?

SUSAN

47:35 Yeah. I mean, in full disclosure. I mean, you're very similar to a lot of our customers that, you know, do have a small segment of residential, you know, we don't offer that, you know, that traditional baked in skews within skews just because, you know, we are more focused on, the commercial side.

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

SUSAN

47:52 So that's how folks that do like, you have that small portion of residential address that need. But yeah. So, so we talked about job items. We talked about quoting. We talked about, you know, the kind of flat rate Ish, pieces sending invoices from the field. Is there anything else you would like to see... addition to that?

BOBBY

48:25 That's a fee like, yeah... or if you want to make time to want to a video, yeah.

BOBBY

48:36 I should watch that regional video, yeah.

SUSAN

48:40 One thing I did want, to show you really quickly that I just thought of that... I remember on the original meeting was pretty helpful... or of interest is our customer portal.

--- *Customer engagement* ---

SUSAN

48:57 So this is something you could add onto your website. And folks as you just saw can go in, put in their credentials, log in and they can see, you know, all their upcoming today's jobs, recently completed jobs by clicking on this job number that would take you to that same surface link page.

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

SUSAN

49:17 And then, you know, click on the invoice at would of course take you to the invoice. You can see outstanding quotes and invoices. But one of my favorite features is the ability for your customers to request service on the asset level, so they can go choose from, you know, if they have three different locations, choose the location.

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

SUSAN

49:37 And then if they have an issue with this back kitchen window, they can request service specifically on that, see all the service history on it already, see any outstanding deficiencies. This is going to create a blank job in service trade and

trigger an e-mail so you can follow up with them with scheduling. Is this something you think, your customers might enjoy using?

BOBBY

50:04 It depends on the customer?

BOBBY

50:12 Yeah, I understand.

SUSAN

50:14 The answer, some folks would love it and some people could care less.

BOBBY

50:17 Yeah.

BOBBY

50:18 I'm from the electrical. So I think electrical, not necessarily the back all the time but, yeah, because I think how many customers we have that are there's some big corporate conglomerate and they're like we're not gonna log onto your little Italy software to view that, you know, because.

JASON

50:36 Or?

SUSAN

50:36 Not, did you send the Bill or not?

BOBBY

50:38 Yeah. Well, a lot of times it's yeah, it's we have to use their platform just to get paid on stuff. And for logging in and logging out on job sites, I mean.

BOBBY

50:55 Yeah. All that.

SUSAN

51:00 And, and the plan is like because I remember, you know, us talking about that.

--- Purchase decision ---

SUSAN

51:04 We were also wanting to kinda generally grow the volume of service particularly on, the hvac side. Is that still the game plan?

BOBBY

51:13 Yeah.

BOBBY

51:13 Yeah.

SUSAN

51:15 Very good. Well, I did kinda wanna ask, you know, just on the, you know, the brief pieces that I've shown you and I know that, you know, you were present for, the BuildOps as well. How are we looking in comparison to them in terms of functionality?

--- *Purchase decision ends* ---

BOBBY

51:36 No know what you mean?

BOBBY

51:42 To be honest, I feel like we're kinda leaning towards BuildOps. I think the biggest thing was service trade is that it integrates with pro core however, you know, so if we, if pro core was, in the budget with all the modules right now, I think we would have been, yeah all on board.

--- *Type of work* ---

BOBBY

52:02 But that's, our biggest thing right now is, you know, we're still a small business that's growing. And, you know, most of the other businesses, I know they're using pro core have hundreds of employees and we're like we're probably what we're getting close to 10 and, but we're doing jobs, you know, that are larger scale jobs at, you know, Miriam over here always says, you know, we're small but mighty because, we're doing it, you know, jobs, people like you're taking on jobs that large. Yeah, we just make it happen. So.

--- *Purchase decision* ---

SUSAN

52:39 So you say you're kind of leaning towards them, what would be, the reason for that? And, and keep in mind, you're never going to hurt my feelings. I didn't write the software. You can be totally honest.

BOBBY

52:49 Well, like I said, I haven't seen, you know, I didn't see the full video but it definitely seems like they have a lot more stuff that's integrated.

--- Type of work ---

BOBBY

52:57 That is also job management for the bigger jobs as well as some of the service work. Whereas with service trade, if it was with pro core, so we have pro core managing our bigger jobs, service trade with smaller jobs, but, you know, just looking at the price points of where we're at right now, the price of, you know, we're looking at, you know, we went with service trade or service trade and pro core, it would be, you know, a significant amount of money.

--- Implementation and ongoing support ---

SUSAN

53:29 I have done you.

BOBBY

53:29 A disservice.

SUSAN

53:30 Because I have not gone over our project management features. So I'm glad that.

BOBBY

53:34 We...

SUSAN

53:34 Talked about that.

BOBBY

53:36 You go over that, I think we did.

SUSAN

53:40 It's real quick. This is, this is kind of a perfectly setup project. This is live and fully functional.

--- ST app contracts and pricing ---

SUSAN

53:47 But basically you can take any job and turn it into a project that can be managed with change orders, works in Progress, managing a budget. So, you know, when we start here with this job... you can see it pretty much looks very similar to that original job. But now we've got this performance tab. So we can see what's been invoiced so far and then how much cost we've actually incurred. So when we go in this, you know, there's a lot of granularity that we can see and we can see so far we're 20 percent of the way through. So not great that we're at 24 percent cost and 20 percent

complete. And then if we want to, you know, for example, go in here. We'll go and view this. So this is gonna take us to that page where we can see a more granular part of the various phases. So, you know, we've broken this out into these three phases. We can see how we're tracking with the original budget, change orders, etcetera by job category. Of course, you know, we've got that same breakdown up there. And then we can see here, you know, there's this unexpected 3,000 dollar part that has been occurred. So when we look at that, we can then say, okay, what, what's going on with that? So when we go over here, we can filter by date when this was actually performed... and we can go down here and see change order needed. We use more parts than expected in phase one. So that's all right there. And then generally, you can see all these clock events seeing who's doing what just generally keep track of the project.

--- *Deficiencies* ---

SUSAN

55:32 And, you know, as folks are going, you know, they're adding comments, they're adding pictures or adding video etcetera. You see all this additional documentation that's been put in any sort of job paperwork. It's all right here. So yeah, that change order was needed. So this is what a change order looks like.

--- *Deficiencies ends* ---

SUSAN

55:54 It's very similar to that quote interface that you saw and you can even do internal only change orders. So with, this is something we did want the customer sign to sign off on because it is a significant cost. However, you know, that's something that you could just do for internal purposes only and not deal with all that. But yeah, so that is our project management functionality. And then, you know, you saw all the graphs, the tracking that you can do to kinda maintain that budget. Any. Other needs in relationship to managing projects that you didn't see here?

BOBBY

56:39 I think so.

BOBBY

56:42 Yeah, I think we're pretty good. We also have a just say, you know, we got a two o'clock meeting as well.

--- *Pricing* ---

SUSAN

56:49 Gotcha. Well, I'm gonna, if you don't mind kinda letting me cut to the Chase briefly. How far off are we price wise from build ups?

BOBBY

57:01 Trying to remember here because you price hold it differently, you guys price per technician, right? Build up prices per office user, if I remember, right?

BOBBY

57:14 Maybe.

SUSAN

57:15 I...

BOBBY

57:19 Don't know, count each technician though, I remember.

BOBBY

57:23 That more than at it, you run it by me real quick, yeah.

SUSAN

57:29 And we would be still looking in terms because, yeah, we're field users, and are we still looking at six for that?

BOBBY

57:36 We might be at a little bit more right now?

BOBBY

57:40 Congratulations.

BOBBY

57:42 We're we're gonna do some hiring. So, it's one, two, three, four, five, six... seven, eight... nine.

BOBBY

57:56 We'll probably have to bring on a tenth field guy if we got Matt and... play started. So probably about 10 field people.

SUSAN

58:11 I mean, Jason, do you, we know we have only have a couple of minutes, but I mean, do you wanna kinda speak to any sort of flexibility that we might have in relation to BuildOps?

--- Purchase decision ---

SUSAN

58:19 Like I'm just trying to figure out like if they're like, of course, you know, charging 30 percent of what we are, we couldn't be able to help you out. But if we're somewhat hanging out in the ballpark, I'm wondering if there might be possibilities.

JASON

58:32 Sure. I mean, so just a respective all time, I mean full disclosure, it's towards the end of our quarter towards the end of our year, right? So we're definitely willing to work with price specifically when you mentioned BuildOps. Just overall, the topic they've got, you know, they've got a pretty good product over there. They're they're doing pretty well. What I would recommend you do is get in touch with them. If that's something you're serious about talking to them with is get in touch with one of their references that they can provide for you.

--- *Purchase decision ends* ---

JASON

59:01 It's in the commercial space doing a similar type of work you guys are doing and speak to them. I can always look, I'm on the sales side, right? So, but I can speak to customers that we've had that have come from BuildOps and they are selling a lot of deals, but they're not getting a whole lot of people up and running.

--- *Purchase decision* ---

JASON

59:19 So I would definitely recommend talking to some reference, see what their experience was like onboarding. We, you know, I'm not sure Susan has gone through with you. We take our onboarding very seriously. We take our vetting process very seriously quite frankly to make sure that you guys are kind of aligned with, you know, what we value and make sure we get you up and running.

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

JASON

59:40 That's. Why we do service windows to make sure that you're not, you know, struggling to get in touch with your project manager to, you know, get set up and things like that. We make sure you have dedicated time. So I just wanted to touch on that. But back to Susan's point.

--- *Purchase decision* ---

JASON

59:53 Yeah, I mean, you know, do your due diligence to your research, but we're definitely willing to, you know, make this work for you because from the sounds of it, the work that you guys are currently doing and the work you guys plan to do in the growth that you guys are clearly experiencing adding technicians, aligns really well, with our ideal customer and who we typically are very successful with.

--- *Purchase decision ends* ---

JASON

1:00:15 So, I'm definitely not in the business of, you know, downplaying our competitors, but, we will certainly do our best to be competitive. But also we take a lot of pride on my team and with Susan of shooting it to you straight and, you know,

we want to be honest with you because at the end of the day, if you end up going with us and it's a bad fit that, that's a bad reflection on us. But at the same point, if you do go with somebody, you know, like BuildOps. Or there are other companies out there. So starting ServiceFusion and you guys have a bad experience. The last thing I want is for us to be sitting here having the same conversation a year from now.

--- Implementation and ongoing support ---

JASON

1:00:47 And so, we, you know, we talk a lot about on our team of making sure we're signing up the right customers because we want it to be a long term partnership, right? Because that's we take pride in is our retention rate. So, and that's another thing I would talk to bio about is, you know, what's your renewal rate, you know, what's your retention rate? And I don't have that information, but I'd be curious to know what it is from them.

--- Implementation and ongoing support ends ---

SUSAN

1:01:08 Yeah, and I know you're we're basically out of time, but in terms of kind of creating a Mutual action plan, I'm wondering, you know, could I'm happy to, you know, send those quick book links and then send, you know, a copy of this as well as, you know, resend all the previous information. Does it make sense? You know, perhaps you could reach out to BuildOps and, you know, ask for that reference, someone that's doing mostly commercial service that's been with them for like over a year. Maybe we, could we get back together same time next week and see where we're at?

BOBBY

1:01:38 I'll be on vacation?

SUSAN

1:01:42 I'm sorry?

BOBBY

1:01:44 I'll be on vacation next week. So I will.

SUSAN

1:01:51 All good. Do we want to push it out just so here?

BOBBY

1:01:57 The following week? Because I, with you on and I'm gonna be gone for half of next week.

SUSAN

1:02:05 You, so, okay, do you wanna do same time next to Wednesdays from now? So, Wednesday the fourth?

BOBBY

1:02:12 Let's go ahead and do that for now. And then I'll let you know as soon as possible, you know?

SUSAN

1:02:17 Perfect.

BOBBY

1:02:18 That...

SUSAN

1:02:20 Thank you so much. I do not want to hold you up from, your two o'clock I appreciate you taking the time. I'll e-mail everything to you and we'll be talking soon.

BOBBY

1:02:28 Okay. Sounds good. Thank you.

SUSAN

1:02:30 Yeah, thank.

JASON

1:02:31 You.

The End