ServiceTrade Demo with Techmasters

Rick Abbott with Techmasters
Recorded on 3/16/23 via Zoom, 1 hour 52 min.

Participants

SERVICETRADE

Rick Abbott
Field Manager

Lauren Rice
Director of Enterprise Sales

Sean Jenkins
SDR

TECHMASTERS

Nick Buresh
Owner

Jesse Krause
Office Manager

Sam Krause

OTHER

Topics

Transcript

RICK

0:00 Good morning, Nick.

NICK

0:01 Morning.

RICK

0:01 How are you doing this morning?

NICK

0:03 I'm good. How are you?

RICK

0:05 Very good, sir. Very good. Hello, Jesse. Can you hear me okay? Jesse?

RICK

0:16 There's Lauren... and I think that's where you, will Sam be joining us as well?

JESSE

0:25 Yeah, Sam is.

RICK

0:27 Okay. Well, you all, I would like to introduce you to my director of sales in the northwest senior director, Lauren rice, she's with us this morning.

NICK

0:36 Hey, Lauren. Good.

JESSE

0:37 Morning?

RICK

0:38 I think she's out your way, right? You're but North Dakota south?

LAUREN

0:42 You, no?

RICK

0:45 I thought you were out that way this morning. I'm sorry, read your calendar, wrong?

NICK

0:49 That'll...

LAUREN

0:49 Be next week?

RICK

0:50 Gotcha. I have a week ahead. Well, good morning. Well, I sent the agenda to you all last evening. Did you catch that?

JESSE

1:01 Yeah, yeah.

RICK

1:02 Okay. That all look good or any changes you'd like to?

LAUREN

1:07 Yeah.

NICK

1:08 It's a good start.

RICK

1:09 Yeah, good. Okay. Well, we can always on the fly address your needs, of course, as well, Nick... excellent.

JESSE

1:17 Good.

RICK

1:19 Well, we'll give Sam here a minute or two and...

NICK

1:25 Was deal?

SAM

1:26 I...

NICK

1:27 Was Dan point this one too? Jesse?

JESSE

1:30 Well, I thought he was Rick. Did you get my, does Dean have an invite for this?

RICK

1:38 You know, I might have missed inviting him. I could share.

JESSE

1:42 Do you have, I don't know if you guys email or not? I shot? I sent an email off maybe 15, 20 minutes to you. It's in there's a link for his email address in there, but I can tell it to, I don't know if you got it or not.

RICK

1:54 You know what? I apologize? I missed that? I didn't check that.

JESSE

1:58 That's okay. I only said it like 15, it was like 15, 20 minutes ago or something like that. So... okay, let me...

RICK

2:06 If you want you could.

LAUREN

2:08 I can add him really quickly. It looks like we have an N brash.

NICK

2:14 That's me.

LAUREN

2:15 Okay. Then I will add Dane and he has been invited and if you don't mind seeing him that would also be good measure. Thanks.

RICK

2:24 I go go ahead.

JESSE

2:27 I'll send back. I'll send you send him a.

NICK

2:29 Say, go ahead, you go, if you're on.

JESSE

2:32 Sounds good.

RICK

2:34 And again, Dane, is he in the service manager role in the...

NICK

2:39 Yeah, action takes care, almost.

RICK

2:42 Okay. Gotcha. Excellent. Okay. I'll make sure to add him to the recap site that we have too.

--- Purchase decision ---

RICK

2:50 Awesome. Okay. Well, good. I think we're have some exciting stuff for you today. We've added some new things as well just recently that we might touch on. We'll see how that pans out in what your needs are and key goals. So, I know we were talking a little bit about the time line and I revealed to Jesse a conversation I had with Lauren regarding your current solution service tighten and the time line there sounds like September first, I think was your renewal date for?

--- Purchase decision ends ---

JESSE

3:26 Yeah, actually, I think it's September 20 third.

RICK

3:29 September 20 third. Okay?

JESSE

3:31 Yeah, that's what I have on my calendar. I haven't pulled up my contract yet, but I have that on my calendar. So I feel pretty good about that date.

RICK

3:39 Okay.

JESSE

3:40 And then you mentioned Rick, maybe you had talked with Lauren and they don't go month to month.

--- *Pricing* ---

JESSE

3:46 Usually, I'm wondering, I can see, not doing that. I wonder if they would ever do something where we gave them like a hard date like we'll be with you until January one or December one or something like that. Like they don't go month to month. But like we just don't renew on the year.

--- *Pricing ends* ---

JESSE

4:00 I don't know that's something I may always propose to them too. I don't know if you've run into that Lauren at all?

LAUREN

4:06 Haven't, in the conversations I've had with folks that are using service tighten, that may want to make a switch. I generally give the advice I find out when your date is, and then figure out when you need to be off because what, from what I understand, they're pretty rigid in their terms. Of course, it's worth asking your account manager if you could give them a hard date. I simply don't know if that's something they do, but from what I understand, they're not super flexible terms and things like that.

JESSE

4:47 Yeah, I, I'm assuming they won't ever, they wouldn't help us much on go anything before September 20 third.

--- *Pricing* ---

JESSE

4:53 And then, yeah, it's just for me. It's unknown whether we, our options are September 20 third, 2023 or September 20 third, 2024 you know what I mean?

SAM

5:01 Yeah.

JESSE

5:02 I'll have to have that conversation with them. So.

NICK

5:05 Let me ask you this. How do you guys handle a situation like that? Well?

LAUREN

5:11 We require 30 days notice... to non renew, and we try not to be as rigid because we know things happen.

NICK

5:24 But.

LAUREN

5:25 We, we tend to do annual or two year terms.

JESSE

5:29 And...

LAUREN

5:31 I'll re, negotiations happen before the renewal date and not after. I can't think of many situations where we've actually extended... term that wasn't annual. There's a few one off situations, but that's pretty standard in the SaaS world.

--- Pricing ends ---

NICK

5:54 Huh...

JESSE

5:55 Okay. I got, I think Dan, Sam should be jumping in here. And then I think Dane says he's coming into the shop, so, okay. But I'm Nick, I'm probably fine with jumping into stuff here and then they'll...

NICK

6:14 Have to...

JESSE

6:14 Jump in when they get here.

NICK

6:16 Yep...

RICK

6:17 Okay. And I will be recording this too. So worst case, just think of things that they might wanna ask or whatever we can address that too. Okay. Sounds good. So you can see my main screen right there, that like a welcome screen service trade, some of that piping inventing and stuff, right? Okay. Good. Well, I wanted to start just by introducing myself for a cab. It, I've been the service trade since November of

last year and worked on looks like who's joining us? Now? That might be Sam. Hi, Sam. We're just starting off Sam from the backflow testing world, automating some of that. So worked a lot with the fire safety kind of folks in the area and then joined on with service trade just recently. And so what I wanted to start off with just kinda getting giving an idea of our whole mantra and that is to make Techmasters as a commercial service contractor more valuable to your customers... and to grow your business through the use of ServiceTrade that's our whole mantra.

--- Customer engagement ---

RICK

7:23 And that's our focus is mechanical contracting business and that whole workflow process with your clients. Okay? And so we wanna help you to turn more of your repair opportunities into revenue opportunities. And part of that is a display where you're showing the information clearly to your clients so that they can see the work that you're doing and understand that you're a professional company that they can really appreciate what you do and not give you so much hassle on the pricing because they understand the quality of your work clearly presented to them in quotes like you see here's, for example, we'll kinda get into that in the meeting here.

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

RICK

8:05 And the idea what that quote is there's a service link right in the quote so that you can get some details about what type of work is being done, the files and pictures that might be attached to that work, and some alerts about some of the efficiency severity, some emergency issues, et cetera, and to have all that available to your clients if you'd like, you know, and also to give them and you the opportunity to communicate with the least amount of phone calls and back and forth in chaos involved sometimes understanding what's going on.

--- Invoicing ---

RICK

8:39 Okay? So that service link helps to get those that quote information across. And then as well, once the quotes approved, then the invoice can be sent right through service trade. So that your clients can see the detail of that and your billing people that pay the invoices can actually click a button and pay it off right from this screen and get that quickly taking care of for your accounts receivable folks.

--- Customer engagement ---

RICK

9:04 To be happy. Okay. And as well, there's a service portal that's presented to your clients that you can utilize within service trade services. So that allows them to kinda get information about equipment, locations, the equipment on site deficiencies, quotes. All of that information is available to them to kinda alleviate some of those phone calls to your office about these kinds of problems and such.

RICK

9:31 So they can have as much of that information available to them if you'd like to present that to them. And then as well, the importance of guys like Nick out in the field, right? You're mostly out in the field, Nick, working out there with the field tech. And you know, to be able to make sure to manage their extremely important time with an easy way to get the details of the types of jobs that are out there, the information at the job.

--- *Access to information* ---

RICK

9:58 And we'll kinda cover some of that dispatching and scheduling. And then as well, well, how do you get that information from the field back in the office? But we have a really nice mobile app gives your technicians an easy way to get the most information from the client to your office.

--- *Deficiencies* ---

RICK

10:18 In terms of recording the assets, recording the history, or seeing the history details, and being able to record as much information as clearly as possible and easily as possible from the field back to the office, present it to the client as a quote and get that information approved on an invoice.

--- *Customer engagement* ---

RICK

10:36 Okay? And so we call that additional identification of work and the ease of work in the field, the identifying that work, pull through work and the deficiency loop, the idea that you're getting that information in the field onto a quote as easily and clearly as possible presented to your clients, get that approval, get that invoice out, get the approval to pay just to make that whole process streamlined and easy.

--- *Pricing* ---

RICK

11:07 Okay. And with that, the idea is how do you pay for a solution like service trade with that kind of pull through efficiency? Well, if you have 25 text, you create one additional job for pull through work a week at a minimum, conservatively, four weeks a month, maybe 500 dollar service job.

--- *Customer engagement* ---

RICK

11:29 On average, 35 percent margin. You can receive a significant amount of additional revenue just by that extra pull through work. And we've done a real report on our over a 1,000 customers. And I have a nice industry report that I'll put into your recap after this meeting, kind of details all the criteria that we use to come up with this type of calculation from our real customer data.

--- *Pricing* ---

RICK

11:55 And the average is about 23 percent additional revenue. So if you're looking at a 1,000,000 dollars, that's 230,000 dollars. So, I'll get that to you so you can look into the details of that. But that's the kind of experience our customers find. So, any questions on that quick introduction? So.

--- *Purchase decision* ---

NICK

12:16 Yeah.

RICK

12:17 There's a lot there but the idea is will show you in service trade, what that kinda looks like in process. And this is casual. So if you guys have any questions, interrupt me any time you'd need and glad to address that for you. Okay. So with that, let's go ahead and pull up what service trade looks like.

--- *Purchase decision ends* ---

RICK

12:37 So this is the solution you're looking at from the dashboard review. Okay. I just logged in. I'm starting my day and I wanna look, I'm sorry, I pulled up a different look here. Let me pull up a different look here. Okay. I had it. So here we go. This is what I was trying to reveal here. I first logged on into service trade and I have a look at my daily schedule, the jobs, let's say for the day, overdue jobs without appointments, past jobs to be completed, you know, reviewed before I complete them and then completed jobs to be invoiced. So presented right here. And I have one of my tax. But AB, it looks like me a little bit at least last name wise, just as an example of a technician and it kinda shows a map of some of the locations. And then as well what I can do is go ahead and pull up one of the locations.

--- *Recurring maintenance* ---

RICK

13:34 And I'll kinda walkthrough the general look and feel of what the, your customers would be stored in service trade. There's a billing address which we have set up in this example as company, abbot paper mill. And then you probably have some customers that have multiple locations. So in this case, I have a location, abbot paper mill, I use that paper mill because in Oregon city, there's a big paper mill on the river right down here.

--- Assets ---

RICK

14:03 So I use them as an example here, but they have a lot of equipment, you know. Okay. And so some of the services at this location that I've set up are I have some AC work. I have provided maintenance contract on a filtration system. I have a AC unit boiler, just some general ideas I put in for this example.

--- Recurring maintenance ---

RICK

14:24 You'll of course have some unique equipment as well. But this is scheduled, you can do it annually quarterly, weekly, daily or, you know, just set up a job on the fly here. And of course, there's other areas you can set up a job for your dispatchers and schedules. But I just wanted to give you an example of what a location looks like in the services to start off with and then to continue on with some of the terminology of a location. We have jobs or work orders for this location. And the history is easily presentable.

--- Assets ---

RICK

14:58 You pull this up and take a look and drill down into some of these past jobs to see that work if you like at this location level. And then we have assets at this location, which is just the equipment that you work on AC unit, boiler, group, cooling, tower, et cetera. Okay, would be listed under the assets.

JESSE

15:19 Can you click on an asset and then see what work has been done on that specific asset?

RICK

15:25 Sure. Let's do that, pull up AC unit. And what I can do is go ahead and look at the services there. I can see any deficiencies in the past that have been fixed. Maybe I wanna look at the actual job as to the details of that job that's the kind of thing you're thinking of, right? To look at some of those.

JESSE

15:49 Like like work history, lot of times like. And actually it's most lot of it's the tech out in the field, but in the office too, they'll be one, okay.

--- Type of work ---

JESSE

15:58 Who was out here last? What did they do on it? What, what's been done on this over the past year, kind of that sort of stuff?

RICK

16:05 Gotcha.

LAUREN

16:07 About that, Jesse.

JESSE

16:09 That's what we, the vast majority of our work is we get is customers are calling us saying our AC isn't working.

--- Assets ---

JESSE

16:19 Our friar is down. Our grill is down. The vast majority is on the service work that's most of what we do. And so our technician is gonna wanna know. Have we done anything on this? Who is out here last? Because we have a lot of recurring customers. We're like we like there might be a, runs a store or that's a fast the chain here in Nebraska there 10 times in the past two months, you know, and, you know, so we just need to kinda quickly be able to figure out what have we done on this piece of equipment, you know? And sometimes it goes back years, you know, might wanna know what was done now. Obviously, if we start on new software, we might not have that long history or whatever, but we're always really interested in what's been done on this specific asset in the past. So.

LAUREN

17:12 Gotcha. Thank you. Rick will show you that out in the field, what the text as well.

RICK

17:17 Okay. Yeah. There you go. So, yeah, I just wanted to kinda give you an idea. I mean, I know that's an important part of what you're looking for is the asset history and the asset detail because from what I understand you don't really have a lot of that right now, right?

--- Assets ends ---

JESSE

17:31 Yeah, it will. It's there, but it's kind of like hard to get to and it doesn't anyway, yeah, it doesn't show up on the, for the customers. A lot of times they want on the invoice, they want to see what was done on this specific piece of equipment on with service trying. Right now, it's kinda hard for our customers to see that looking at the invoice. So.

--- Assets ---

RICK

17:51 Okay. Gotcha. Well on this location, I was gonna pull up a job to kinda give you an idea. I set up a job for today for a rooftop hvac unit and added the scheduled. I took it from the scheduled maintenance and added that to this job, put in some general parts of labor et cetera, and you're gonna see clock events pop in here. As I go to the field, look at this. You can see the asset that I'm working on the AC unit, and I might have some attachments there like maybe a mill map or some information as well. So, this is a job that I've set up and what I'm gonna do then is, well, any questions on this look in the office? Kind of you? So far? All good so far guys?

--- Access to information ---

NICK

18:41 Yeah.

RICK

18:42 Okay. All right. So, God, well, what I'm gonna do now is go ahead and... move to... the field view and I'm gonna share my screen there... of what the mobile the field technician will be able to see. So you're gonna see that here in a second, and this will pop up and give you an idea of what you're gonna see in the field.

RICK

19:17 And what I'm doing now is looking at my cell phone out in the field. I'm gonna move my picture over here so we can take a look at that. There we go. And what I'm looking at is the job that I was looking at in the office just pulling up the job here. Maybe I wanna see some details here of unscheduled work. Maybe I want to see some completed work. I could see that. But today, I'm looking at my screen, just pops up the jobs that I have to work on right? On the front page of my cell phone. This is a small little iPhone that I have, I can pull up the job, and then the mobile app presents the location, the address, I can hit directions if I want to.

--- Assets ---

RICK

20:08 And it shows some nice windows where I can get some details of this job. I can look at the services that I'm gonna perform. This is an H back unit. I can look at comments. Maybe I might need the security code. If I need to get in on the site and save some time with some notes there.

--- Assets ends ---

RICK

20:25 I can look at the contacts at this location. You know, I see Jesse, I see Sam, I see, you know, Nick there, and that will help us in terms of communicating. I'll show you that in a little bit. I can see some job items that might be included on this.

--- Assets ---

RICK

20:44 And I also have the asset which is the AC unit. And if I wanted to go ahead and look at some details, I can see the service history right here on this particular unit. So there might be some work here, a lot of repairs in the past. Maybe I wanna recommend that we replace it today. We'll see, I'm gonna take a look at that unit and get some more details.

NICK

21:07 So go to that screen there. Like the deficiencies, is that just for that unit or is that for that whole location?

RICK

21:15 This particular presentation is about this particular unit. You can.

SAM

21:22 Wait, wait.

LAUREN

21:22 Wait, wait. So, so the deficiencies are gonna be for all the assets at that site. And then if Rick were to click into a specific asset then?

JESSE

21:36 He'd be able?

LAUREN

21:36 To see the deficiencies associated with only that asset?

NICK

21:42 So there's only one, those 42 divisions for the whole site, the whole location?

JESSE

21:51 Yeah.

SAM

21:52 Is this location only have one asset on it? Is that why we're seeing the same? Same? The job only has one asset. So, how did the asset get on the job here for the equipment? Does the office need to connect the asset for the job? Or can the technician add the asset onto the job?

RICK

22:12 So, if I wanted to add an asset, I could add an asset and select an asset from a group such which I'll kinda show you here in a second. What I'm gonna do because as I look at this at unit, in this example, I'm gonna find that.

SAM

22:28 You're saying in a new asset, I guess I'm trying to ask, I didn't see, does this location that you picked this place that we went to? Does it have multiple assets on it already has one asset like 30?

LAUREN

22:40 I'll answer this. I think, Sam, I understand your question. I can tell by looking at the app that there's only one asset currently at this site. If there were more than one asset regardless if this work order were tied to it or not, it would have this multiple asset.

SAM

23:01 And I...

LAUREN

23:03 I were to click into that asset tile there, we'd be able to see all of them at the location, and then you can filter that down to just the assets for that.

NICK

23:15 Say it.

LAUREN

23:17 Work order?

SAM

23:19 Your question?

JESSE

23:20 Was, and...

LAUREN

23:22 The asset, can the technician pick the asset that's broken when they're out there? Because the dispatchers or coordinators may not know the answer is.

SAM

23:33 Okay. Yes. Sorry. I guess my Jesse telling me that you guys can't hear me very well on my thing. So, I'll work on my microphone, but yes, that's a.

--- Tech On-site ---

RICK

23:42 All good. Yes, sad it's yeah, it's a little scratchy but we can hear you.

SAM

23:47 All right.

RICK

23:49 Any other questions so far? Okay? So this is the presentation at the field. I'm kinda looking at this job that I'm going to be heading out to. Now, I can go ahead and clock in and start tracking some time from my company such as job preparation if I wanted to. In this case, I'm just gonna head on out there. I'm gonna just go ahead and clock in and route. And what I might wanna do is go ahead and notify the customer that I'm coming out there. And so I'm just gonna send, let's say, Nick, I'm just gonna send you a notification that I'm coming out here in a couple of minutes and then show up in your email. Okay? And you should see that in your email inbox. And so now I'm in route, let's say I end up on site and no problems and traffic. I'm gonna go ahead and clock out of that activity and we automatically clock in on site at the location. So I'm clocked in now on site and I'm determining where the equipment is.

--- Assets ---

RICK

24:52 I might want to go to an attachment and look at a mill map of, you know, exactly where that equipment might be. I could do that or receive any other information that we set up for this job to save time from my field tech, right? The whole idea is the most efficient work experience you can have for your field tech and try to make that easy.

--- Deficiencies ---

RICK

25:12 And so now, you know, I go up to the AC unit and I find darn it, you know, one of those darned weather balloons was shot down out of the sky and my compressor has broken on this AC unit. So I'm gonna go ahead and add a job item which is adding the compressor that I need to fix. So I'm gonna go ahead and put in a compressor.

RICK

25:36 And add that into this job. Okay? And we'll see that come up in here compressor. And then I'm gonna go ahead and add this deficiency issue. I found an issue, the compressors broken. I need to replace it. So we're gonna add an efficiency real quick and my, what I can normally do is just hit my microphone and go ahead and add that information. But I'm just gonna type it in... replace... the compressor.

RICK

26:14 And put that in. And what I can do now is maybe take a picture, add a verbal record of, you know, hey, found that this compressor was damaged, need to replace it. I can put it in a video if I wanted to. I'm just gonna take a photo and add a photo of my destroyed compressor.

NICK

26:34 Which happens to be the...

RICK

26:35 Service trade up and use that photo and drop it into the job. Maybe I wanna add another picture of say some other issues such as this that I found and put that in next to that. And we found that if you have at least three or four of these impressions, it's going to really help your client to understand what's going on and then get that quote approved quicker and get that invoice approved quicker. So that kinda helps as well. So we're gonna go ahead and.

NICK

27:06 Can you take a picture with your phone before you do this? And then add that picture later like just on your camera on your phone? Yeah, you on your head, yes. So.

SAM

27:16 I...

RICK

27:18 I didn't have that set up but I think you Lauren for that. And so I put that in and then I'm gonna go ahead and say that this system is inoperable. It's not functioning and there's the AC unit that I'm working on and this is a new item and save it. Okay? So now what I can do as well, now that part has been set up, I can go ahead and... go ahead and go back to the office view and kinda look at that.

--- Tech On-site ---

RICK

27:49 Now you guys can see the screen back in the office, right? Okay. What we can do here is, you know, I'm back in the office trying to understand what's going on. I can take a look at this and I can see the clock events from the field occur.

--- Deficiencies ---

RICK

28:04 So I got my technician out there. He's clocked in and what's happening. Well, it looks like we have to replace the compressor. So instantly that information is available back in the office... and I'm gonna click on the details there and kinda find out what's happening. Well, it looks like I need to replace the compressor.

--- Quote templates ---

RICK

28:23 Maybe I need to go ahead and order the part for my supplier, call them up and get that situation taken care of. But maybe I want to get this approved from the client

first. Well, all I need to do then is go ahead and create a quote and we'll go ahead and pick a standard pricing contract there for that for replacing that... and putting it on the quote.

--- Deficiencies ---

RICK

28:50 So I have a new quote and the details from the field dropped right into the quote took a couple of steps and I have it right here. I have the attachments from the field there's. My picture, my verbal record, my video, maybe two or three other pictures that I've added put in.

--- Quote templates ---

RICK

29:07 And the nice thing about this is I can quickly get this out to the customer. So I'm gonna go ahead and send that out.

LAUREN

29:13 It before you do that, add a template.

RICK

29:17 Yeah, you're right? Yes. So what I wanted to do as well as kinda show you folks a nice way to drop in information into the quote. So in terms of applying a quote template, it saves your group some time because you can have preset up templates for various situations. And in this case, I have a compressor issue. So I'm gonna hit compressor replacement and drop in all of that data about that situation right into the quote. And you can have these setup for all sorts of different situations. You know, once you do it once you can benefit ongoing from that information rather than having to retype this in every time. So I'm gonna add that in to this quote. Thank you, Lauren for that reminder. And the idea is to save you time as you create these. So now that's added in, we have some information, we have some put in this quote. So now I'm gonna send that out to the customer and I can kinda choose some things. Maybe I don't want to include that attachment or maybe I want to add some comments.

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

RICK

30:19 I can do that. I'm gonna go ahead and send this to all three of you, Jesse, Nick, and Sam, and as well as myself just to have a copy. And what I can do is have that quote sent out. Maybe I wanna require a purchase order, you know, when they approve this to make sure that that's added to help your folks in accounting. And I'm gonna go ahead and send that out. So now all three of you should have that in your email inbox, so you can take a look at that and let's say, Nick, if you see that in your inbox, if you could maybe pull that up. And if everything, let's just say everything looks good, go ahead and approve that.

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

RICK

31:07 Did that come through? I...

                                NICK

31:08 Don't have it in my inbox. I didn't get that other one either.

                                JESSE

31:13 I got mine came through here.

                                RICK

31:16 Okay.

                                LAUREN

31:19 I have a question for you all while Jesse is pulling that up and approving it. How much quoted work are you all doing?

                                NICK

31:27 Yeah.

                        --- Paper process ---

                                LAUREN

31:30 We do a lot of demand work. We generally have to go and go back to repair whatever you find is wrong?

                                NICK

31:37 Yeah, a lot of that quoted stuff we do is through a facility companies like a service channel or something like that. We have to enter the same information. We have to enter that into their system a lot of times, got it.

                    --- Customer engagement ---

                                LAUREN

31:53 Even help you if you're using service channel to do all that.

                                NICK

31:57 I like the quote thing. Yeah, from what I've seen, it looks pretty slick.

                                SAM

32:00 Okay. Yeah.

                                RICK

32:03 The idea is to help you totally maximize that experience with those clients so you can develop that relationship, right? And that relationship adds to more revenue.

--- Accounting integrations ---

NICK

32:13 Right.

JESSE

32:14 Yeah. And I think...

RICK

32:15 Sounds...

JESSE

32:15 Like service channel, and some of those also like we have to enter the quote information in, but we can attach PDF. We could attach this, you know, a PDF of this upload to their site too and stuff like that. So.

SAM

32:27 And would these things be able to, do you have any sort of integrations with any of those like service channel or eco track or cargo or any of those?

LAUREN

32:39 Service channel? Yes... it is a little bit costly. We do not currently have integrations with eco track or CEO or verse or insert portal here. Not for lack of effort, if the portal has API... we can integrate with it. The truth of the matter is that we don't spend a lot of development into making third party or national account work easier because we find that work is generally less profitable than going direct to consumer.

--- Customer engagement ---

LAUREN

33:20 So, so we try to prioritize features and functionality that helps you earn more revenue versus a fraction of what you would get.

SAM

33:32 Otherwise, so, and that's what probably what like five to 10 customers use those different third party things. Most of them don't okay. But some of them are bigger customers. One of them is.

--- Quoting ---

JESSE

33:47 It's...

SAM

33:47 Our biggest customer that use eco track. So it eats up not, you know, I wouldn't say that it's therefore like, you know, more than it's not even close to 50 percent of our work. But then the quoting stuff and we're definitely quoting but I would say, I mean, don't you think, Jesse, Nick, that probably quotes represent like we don't count the third party apps, quotes represent maybe like 15 percent of our work.

--- *Type of work* ---

SAM

34:14 It's got, I'd say probably five percent least is breaking it's. Breaking fix. A lot of it is when these calls us, my frier's down, we show up, the guy looks at, it needs a new thermo couple. He changes up the thermo couple or we don't have one. He puts one on order and he comes back, changes at thermo couple. You know, maybe hopefully he talks to the manager and the manager says, sure, go ahead and do it. But if it's low enough below it not to exceed, we'll just change it. Do it, send an invoice that's probably a significant majority of our work?

NICK

34:45 Yeah. If it's usually a, you know, I guess the companies that some of them have those facility places, but even then they need quotes on that bigger stuff.

--- *Pricing* ---

NICK

34:55 But if it's usually emergency like a walk in cooler, I mean, it's you throw them a number, but it's usually we got to have it, go ahead and do it.

LAUREN

35:06 And so, so 75 percent break 15 percent quoted, would the other 10 percent be like planned maintenance?

--- *Pricing ends* ---

NICK

35:15 Yeah, probably.

LAUREN

35:16 All right. Thank you. Thank you for indulging me.

SAM

35:23 Yeah.

RICK

35:25 Okay. Well, then to continue on with that, Nick or Jesse, did you see that come through on your inbox?

JESSE

35:33 Yep. Yep.

NICK

35:34 I never did. I'm just looking on my phone, but I never did see it come through. It's not in the it's not in either the other or the junk or anything. So.

RICK

35:43 Okay. The.

SAM

35:44 Email address is the type on your email address?

NICK

35:46 It looked like it was right?

RICK

35:50 I did lean.

NICK

35:51 In there?

RICK

35:53 That's what happened? My bad, Nick. Sorry about that. Let's see if I can change that real quick that way in the future. When I do this, you'll see stuff.

--- Quoting ---

RICK

36:03 There you go. I think that looks good. Okay, there we go. All right. So, and did you approve that Jesse by any chance? Yeah. Okay. Go ahead that's cool. There you go. See. Now, I have the history of that too, which will help your office kinda see who approved what went. So that will be helpful too when they open that and do that. So that's great that you have approved that. And as I refresh my screen, you're gonna see that approval show up back in the office that Jesse has approved it. And then what I can also do then is create a job from this quote, get that out because it has been approved.

--- Quoting ends ---

RICK

36:46 Let's say the due dates tomorrow. I can go ahead and copy all that information to this and go ahead and get a job out. Now. One of the things that we might be able to set up for you is some of the project type of look within service trade? I could create a project, right? From this quote, if it's a longer or job. Do you have jobs that might be, say three to six months or are they typically kinda... one one week kind of jobs?

NICK

37:18 We got some installs that can take that long, not, we have some that will take, you know, four or five trips sometimes or more.

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

RICK

37:26 Okay. Where you might want to manage it more like a project ongoing kind of thing, right?

NICK

37:30 And, and if you do make a project like that, can you Bill within that in different increments without closing that project?

LAUREN

37:37 Yeah. So you can do Progress billing?

NICK

37:39 Okay.

RICK

37:42 Yeah. I just wanted to bring that up. I'm not necessarily prepared to kinda show that all to you today.

--- *Quoting* ---

NICK

37:46 I just had a question back doable. Let me go back with when Jesse approve that. And it comes back. Is there an alert that is set onto the screen who's ever looking at it that says something's been approved? Or do they have to go look at the job to see?

JESSE

38:04 Or do I get or does, yeah, someone Techmasters get like an email that says, you know, this customer approved. It, is that what you're asking I?

NICK

38:13 Yeah, I...

NICK

JESSE

38:14 You...

NICK

38:15 To go look if that customer approves it four days later and you kinda, it kinda, you know, you kinda forgetting about it now and all of a sudden is something gonna pop up on your screen that says this quote was approved. So the dispatcher whoever needs to see it is gonna see that. So we can schedule something, get parts ordered for it.

RICK

38:34 I thought on that was to go to the screen here where you can easily see all of that activity bulk by pulling up approved quotes here and looking at them submitted and viewed submitted but not viewed, rejected, submitted all of that. And, you know, get a whole listing of all those at once. So this.

LAUREN

38:56 I'll add some color to that. Rick is right there's a great like reporting functionality specific to quotes or jobs where you can run quotes of the approved status that don't have a job associated with it. So the coordinators can know I need to order this part. I need to schedule this out. You can also set up your account to receive notifications for the following milestones. When a deficiency is reported, you can get an email notification. When a quote has been viewed by the customer, you can get a notification. When a quote has been approved by the customer, you can get a notification. When a customer's requested changes to a quote, you can get a notification and then your customer will also get notifications like, hey, thank you for approving this quote. So, yes, there's a lot of notifications that you'll be able to get to.

NICK

39:54 What about if a quote has been out there for a week and they haven't viewed it... or anything? Can we, will that pop up to where we can resubmit it? Maybe?

LAUREN

40:04 A great use case for this report that work showing?

NICK

40:08 Know, because if everybody's like me, I get tens, thousands of emails every day and are pretty quick.

LAUREN

40:15 Yeah, you can actually like by those parameters, you could say show me all the quotes I sent last week that haven't been viewed by the customer and there's a way to bulk resend those quotes.

NICK

40:26 Nice.

LAUREN

40:27 So, so, yeah. How would that help you? Do you struggle with your quote follow-up process?

NICK

40:33 Yeah, I would say we struggle but there's some that get left out there or there's some to get approved that get kinda missed or, you know, so, so just those notifications I think would be nice.

--- Tech On-site ---

LAUREN

40:44 Okay. Cool.

NICK

40:46 I bet you guys go look at them too. That's a nice option too. So.

LAUREN

40:49 Yeah... yeah.

RICK

40:52 So now, you know, I could go ahead and schedule this job and get it set up to go and let's say if I wanted to complete it, I can complete it and go ahead and create an invoice if I wanted to as well.

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

RICK

41:11 So, the idea then is we have the information from the field, we have the quote went out to the customer approved it and the job was done, I can go ahead and look at some details on the invoice and then go ahead and send that invoice link out to the client and have them take a look at it. And so I'm gonna go ahead and send an invoice link. And that's went to Jesse. So I'll add now that I have the correct address here for you, Nick, let's put you on there and Sam, so you can kinda get an idea what that looks like and send that out. And that should also be in your inbox here in a few seconds. And if I'd like to take a look at the history, I can take a look at that. I send that invoice link out.

NICK

42:00 Now, I got it.

RICK

42:02 And then you can see in that presentation as well a little bit about the I'm gonna pull it up here. It should look very similar to this, has tech masters on there, sees the details of items you could do totals if you just didn't want to show all the details of the itemization as well and kinda gives you some ideas of what that look and feel would be. Your client has the ability to go ahead and click on go to service details. And this is kinda nice because then they can see what kind of work you've done, see some of the parts. If you'd like see some of the files like that picture I took and see some that I have to replace the compressor so that work was done. And so let's go ahead and get that invoice approved and paid. So when you click pay now, you can go ahead and pay that off a CH or what or whatever you'd like to approve there. They can print it off, take a look at it. So that's the process, the work order workflow, from the field to the office to the client quote approval, and even invoice all within, you know, minutes it.

--- Tech time tracking ---

NICK

43:15 Let me ask you this real quick on the labor line. What if there's more than one technician on the job? Well, I have two different labor lines, one for each technician and we'll have their names on there.

LAUREN

43:26 How do you do it? How do you do it now?

--- Tech time tracking ends ---

NICK

43:28 Well, how we do it now? I don't like it... how we did it before with our original. I like that a lot better. Like... how the invoice looked and how it broke down the labor to parts and who did what, and everything... like.

JESSE

43:46 Yeah. How I think, Nick, how you'd like it, right?

--- Assets ---

JESSE

43:48 Is where it breaks out, what piece of equipment they worked on. You know, a description of what they did on that piece of equipment, and how many labor, what labor is charged for that piece of equipment. And then because a lot of, we work on multiple pieces of equipment on each job. So then, and then, okay, you know, the fryer, two hours of labor, you know, replaced fry filter pump, you know, the next one, you know, rooftop unit, you know, clean rooftop unit, two hours of labor or whatever like that. I think, Nick, anyway, I think that's kinda the setup that he's looking for.

--- ST app contracts and pricing ---

LAUREN

44:25 I understand your question. And by the way that's a great question since service trade or work orders can be comprised of one or multiple services, technicians... can document which parts labor and material goes with which service. And if Rick were to click the detail level for customer, drop down up there right above those job items.

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

RICK

44:59 Got you.

LAUREN

45:00 The option to present to the customer where it says group by service. If we had more than one service here, you could show exactly to your customer how much time was allocated for the friar, how much time was allocated towards the walk in. So, so you absolutely can do that.

--- Assets ---

LAUREN

45:22 The customer won't see which technician that labor is assigned to. You may delineate the types of labor to like... hot equipment, labor and cold equipment labor, however, whatever naming conventions you have, but you certainly will be able to see which technicians worked on which piece of equipment and which service in the office.

--- Tech On-site ---

NICK

45:45 But the customer won't see the name of it.

LAUREN

45:47 Yeah, correct. Got you.

SAM

45:51 I might have missed it earlier to, when you add, how do you add multiple services? Was that part of those part of the process? The technician, they can add multiple services when they arrive on the job.

--- Dispatch ---

LAUREN

46:03 Yeah. So, I think the easiest way to show you would be from the office, Rick, go to the tab one two to the right of where you are now.

RICK

46:16 Pardon me?

LAUREN

46:16 Go to the tab that's too. To the right of your current.

RICK

46:21 Gotcha.

LAUREN

46:23 Scroll down... and in order to add another service to the appointment, you would simply click add service to this appointment.

--- *Assets* ---

NICK

46:34 And that shows up on the, that shows up on the mobile app also.

LAUREN

46:37 That's correct?

NICK

46:38 Okay.

JESSE

46:38 And is it possible for the technicians to add a service?

LAUREN

46:42 Yeah.

SAM

46:43 Yeah.

JESSE

46:43 Okay.

SAM

46:44 Cause that's what we probably would do is the technician would show up when he's working on the friar add service, do all the friar stuff. And then when he goes over the walk in, he'd have to add service, again, do all the walking stuff.

JESSE

46:54 It looks like they can add the asset to the specific service.

NICK

46:58 It's very rare that the office is going to put an asset in there because they don't know which, you know, we go to place, we go to raising canes that has eight friars, you know, they don't know which prior it's gonna be. So that's up to the technician to pick out which one he's working on then.

--- *Assets ends* ---

LAUREN

47:14 Nick, you could have said it restaurant now, I want raising cans.

NICK

47:18 Sorry, then.

JESSE

47:21 Pretty good. I had it Virginia last night so.

LAUREN

47:23 I'm staring at a bubble on the panel up now?

NICK

47:27 I want something fry.

LAUREN

47:31 Yeah, absolutely. I know with Rick phone app being kinda connected differently to this demo, it's probably not easy to show you that, but text can absolutely go in and create services when they're out in the field, like because the customers like, hey, you're already here, look at this fryer that's our.

--- *Access to information* ---

NICK

47:50 Yeah. We get that all the time. We usually get that after we've taken our tools out to our truck while you're here.

LAUREN

47:56 Yeah, everyone loves the scope creep, right?

JESSE

47:59 So...

NICK

47:59 The, and you work with android and apple on the side, right?

48:03 Correct. That's. Correct?

RICK

48:05 If you want, I could share my mobile app real quick.

NICK

48:09 I thought you did, or is that just pictures?

RICK

48:11 I was just gonna pull it up again if you wanted to learn. Sounds like we're...

NICK

48:16 I think we're okay. I think I saw enough. Okay, it looks pretty easy. You know, the one with service type we have now, the screen is not, it's more made for a tablet than it is a phone.

--- Access to information ends ---

NICK

48:28 And so you have to really squeeze it together or make it bigger smaller a lot in when you to hit the button you want to.

RICK

48:36 Yeah, it's pretty tiny, you know, if you wanted this is the one I was showing you guys... but it's kinda nice. Some technicians probably like to have it handy and small, you know, so.

--- Access to information ---

NICK

48:47 I'd rather use my phone than a tablet just because it's with me all the time. I get the pictures. I can do everything right there while I'm working on it now. I know some guys use tablets now and they'll stick to doing that. That's why I ask, can they take a picture with their phone and add that picture to?

--- Access to information ends ---

RICK

49:02 Yeah. Everything I did was right on this little, you know, 300 dollar iPhone, so.

NICK

49:07 300.

RICK

49:07 Yeah.

JESSE

49:09 Literally, a...

NICK

49:13 Okay. Where are we do next then?

RICK

49:15 I just wanted to kinda give you an idea of that. One thing that's kinda nice is well, let's look at the agenda here.

--- Dispatch ---

RICK

49:22 We're looking at technician view, admin view. One thing we didn't show as a client view. And so what I wanted to kinda do is pull up how well I had this logged in. So let's go ahead and log in real quick. You can have this set up for your customer so that they can look at while you're looking at today's, jobs that are on the site, the upcoming jobs at location.

--- Assets ---

RICK

49:48 I can kinda see some information about the admin paper mill. I can see, you know, some information about the jobs there, the service history. So just wanted to get kinda give you folks some idea of how that could be presented to your client and give them some information about what's happening there. So let's see if I... just wanted to kinda give you a, you know, some idea of how your clients could see the services that have been performed and take a look at things that way. I think this is the job we were working on. So if you wanted to click on it, you can kinda take a look about those particular, you know, jobs that have been performed.

--- Dispatch ---

JESSE

50:37 Can the client jump in? Are they looking at showing them only jobs that are finished and done in build? Or can they look at both jobs that are finished and build and ones that are in Progress? And then do we have any control over that over whether they can see, you know?

--- Invoicing ---

JESSE

Cause I'm just always thinking sometimes someone types in something that we don't want to. It's kinda nice. We like kind of like having a backstop sometimes in the office like in the office reviews all the invoices and finalizes them before they go out. Because sometimes I'll send customer might look and say, like you try and pay a Bill before it's been finalized and stuff like that anyway.

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

LAUREN

51:17 Yeah. So I'll answer that. So they will be able to see ongoing work as well as completed work. You can set up account default settings to limit what your customer sees by default. So like comments, maybe one thing that you don't wanna share with your customer because this may be more internal or, you know, the risk of the technicians like misspelling something or using colorful language, maybe higher than like maybe just pictures and stuff.

--- Customer engagement ---

LAUREN

51:49 So, so there's like ways to get around that your customers won't be able to see the invoices until someone actually goes in and creates them. So there is a little bit of checks and balances there, but I will say giving the customer access to the portal will give them visibility to all of the sites and what's going on like currently and in the past. So do with that, what you will?

--- Customer engagement ends ---

JESSE

52:22 Yeah. I mean... I think that's in general for most of our customers. I don't know for us, we probably, I don't know your thoughts or Nick and Sam and Dane, but, you know, we probably like them to be able to jump on and look at, you know, rather than having to call the office and us sort quizzing the technicians and stuff like that where they can just pull up and look at how many times we've been out working on their AC.

--- Paper process ---

NICK

52:45 I think the only thing they really need to see his invoices, I need to look at jobs.

JESSE

52:50 On current in Progress. Yeah. Well, because sometimes one of our issues are like we'll have a part that is on order and we don't maybe we're too busy. It actually is here in the shop, but we don't want the customer to know that because we're too darn busy. But if they find out that things in then they're blowing us up to come to it and stuff like that. So.

LAUREN

53:10 Yeah... it raises an interesting philosophical question, right? Like what's the best way to communicate that to the customer? And especially like it's not as prevalent now but when... the supply chain issues were going.

--- Paper process ends ---

JESSE

53:26 Yeah. I still having problems with that.

LAUREN

53:29 How do you convey to the customer? Like what's going on?

NICK

53:34 No, it's amazing the customer very understanding they understood there was issues that we out of hand. So most of our customers were pretty good about understanding. We can't get the part. And there, there's still some here. And there we just, we've gone. I've gone to Amazon or eBay parts and I swear, you know, I hate doing it but I'm trying to get the customer going and knock on Wood. We haven't had big issues with those parts we've gotten from.

--- Customer engagement ---

LAUREN

54:01 Probably says a little bit, a little bit of something about how you communicate with your customers because like you could easily just like, all right, well, I'm just gonna wait and not ever update your customers. So they're probably more okay with it because you've addressed the idea of the time to value you're cutting down the amount of time it's taking you to deliver that value to your customer.

--- Customer engagement ends ---

LAUREN

54:22 Like look, we don't have the park but here's the update and I'm trying to find it on Amazon, eBay and you will be the first to know as soon as we know.

NICK

54:31 I know to where I'm trying, I don't want them to go look or any.

LAUREN

54:33 Well, sure. You get the idea. I've caught every supplier.

--- Dispatch ---

NICK

54:38 Correct. So, I think I got the gist of I wanna see a dispatch board, what it looks like.

RICK

54:47 Sure. So here you're looking at a dispatch board with jobs at the top. We have some preventive maintenance jobs, some H back jobs, compressed air, equipment, jobs, filter, cleaning jobs. And what I can do is you see two of my technicians under the abbot office that we've been using for this demonstration and what we call like two rows or swim lines. And I can see that paper mill work is right here and I can drill into that and take a look at the details if I want about that job. But in terms of scheduling, I can just drag and drop this into one of these times for my technicians, okay? And put that in there based on the time that they're available and drop it in.

JESSE

55:37 So...

RICK

55:38 This is just one view.

JESSE

55:40 You know, I see. So you have like abbot office, like right now we kind of one person dispatches LinkedIn, and then that same person dispatches Omaha, but we, it looks like you can actually pull up. So like abbot office for us might be LinkedIn. Is that a way of understanding what this would be? And then, and then you could have a different view with different technicians if you pick a different, that top left corner where it says abbot office is that?

RICK

56:04 Yeah, right. Lauren, I mean, the idea with the office is to separate your different business units and to easily address...

--- *Dispatch ends* ---

LAUREN

56:12 That's correct?

RICK

56:14 So, with that, you know, I'm just picking up AB, it office so you can see the two reps there. But then there's also this other business entity a plus refrigeration. And then there's this third business entity architect solutions and the text there. So you can kinda see them in their various swim lanes and groupings.

--- *Assets* ---

NICK

56:33 How many different categories can you have on top for calls that are not yet distributed to a technician? You see, you got four columns up there. How many different ones can you have?

LAUREN

56:45 As many as you have in your account?

RICK

56:48 Yeah, you might.

NICK

56:49 So you go make up. You could have one B, kitchen equipment. You could have one be cooler as you could have. So, okay.

LAUREN

56:56 Yeah, you can filter it by type of job, whether it's service, quoted, maintenance, you can filter it by like the service that you're providing, like you just said, like refrigeration, kitchen equipment, H, fac, et cetera.

NICK

57:11 I'm assuming when the person makes up the call, the job there, they're going to be a category you pick and it will automatically put it underneath that category then.

--- Dispatch ---

LAUREN

57:20 Yeah. So, Rick, why don't you add a job?

RICK

57:23 Sure. So this might be... service call as probably provide a maintenance call, maybe.

JESSE

57:33 Let's do a service call because that's probably most of what we do.

NICK

57:38 I even know she had priority service call, Matt. So I'm assuming you can have a category for that rather than color it, you could put it under a category.

--- Dispatch ends ---

RICK

57:50 To go ahead and just go ahead and set something up here Lauren?

SAM

57:57 Maybe I'll to see.

                              JESSE

57:57 I'll...

                              RICK

57:58 See.

                              RICK

58:07 And put some information in there. Assets of service. We'll say.

                              NICK

58:13 You can leave that. Can you leave that blank? Yeah. Okay. Because a lot of times they're not gonna know. So I'm in the office making it up?

                              RICK

58:22 And create another service or just go ahead.

                              LAUREN

58:24 Hey, this service line, Rick?

                        --- Dispatch ---

                              RICK

58:27 Okay. Just say.

                              JESSE

58:29 Yeah.

                              NICK

58:33 That service line is those categories you had above the dispatch board, right?

                              LAUREN

58:38 Correct. Yeah.

                              RICK

58:44 Let's just say that. So it's a setup for today, yes.

                              SAM

58:52 Okay.

RICK

58:56 And I think this might be the one we just set up.

LAUREN

59:00 I don't think so. If you go to where it says abbot office below that, in your swim Lane, like right above your swim Lane... and then go to the unassigned section over all the way on the right side... click where it says two unassigned?

RICK

59:24 Gotcha. That's probably all right? The right?

LAUREN

59:27 Is it, yep.

SAM

59:30 You said it for a time? So, did we have to set it for a time?

LAUREN

59:35 Do most people do that based on the time the call comes in so they can prioritize it? And then Rick will drag it to like one PM, anything to the left of that red line as in the past, so you don't want to schedule anything for that, but then he can drag and drop it to the time.

NICK

59:57 Why did it go down to the unassigned? Why didn't it go up to the, up to the boxes up above or the columns up above?

JESSE

1:00:05 I...

LAUREN

1:00:05 Should have gone up there. I think if Rick had toggled that available jobs off and then back on, again, it just that's just sorta the way it works for the day calls that come in.

NICK

1:00:17 Okay. Now, when we get busy in the summer, some calls take two or three, maybe a week to get to.

LAUREN

1:00:24 Yeah.

NICK

1:00:25 How do you move? Do these calls? And those columns automatically move to the next day if they haven't been assigned to anybody.

LAUREN

1:00:31 Automatically, but you can like bulk move unassigned work to the, I don't remember how to do it, but there, there's a way.

NICK

1:00:39 We will have to do that.

LAUREN

1:00:41 Yeah.

RICK

1:00:42 We also have a scheduled jobs tab too that, you know, might be easier from a calendar kind of view where you can, you know, pull up things and look at details.

LAUREN

1:00:52 I don't see them using this as much. That map schedule is great for pre planning work, you know, is upcoming like your quoted work or your maintenances. The dispatch board is probably where you're gonna live most.

--- Dispatch ends ---

NICK

1:01:04 We are a very fly by the seat of our pants. But when the calls come in, you know, we might go into a day where I'm looking for something for somebody to do. And all of a sudden we're backed up and we can't get to everything today. I mean, we can get that many calls in a day, you know, it's just.

SAM

1:01:25 Okay.

NICK

1:01:26 That's how our biggest thing planned ahead. Maybe if some installs on like refrigeration or rooftop or something and then maybe putting a part on that has to be done first thing morning. Otherwise, it's kind of like here's. Okay, you're available for this and I'll do that. So.

SAM

1:01:42 One.

RICK

1:01:44 Of our goals will be to help you with that. Do you think you might be able to set up, you know, contracts more for that kind of customer or what do you think?

NICK

1:01:54 You know, it's more, a lot of it is just how busy we get and can we get to that, you know, that maintenance is supposed to be due this day, but it might be, we set it up for that week, try to get it done that week, you know? And when it's 100 degrees out, we maybe they don't even get to it that week, sometimes we get a little behind unfortunately, but... I don't know for sure yet, right?

LAUREN

1:02:18 One of our customers in salt lake city is the, they were known as core refrigeration. They're now part of CMS next tech. They've got about 150 technicians and they're doing exactly what you all do. They do the hot and cold side of things. They do some age back. And I think at their peak, they were running like 3,500 service calls like in the July August. And they actually use a central dispatch to dispatch for all of their locations across the mountain west.

--- Dispatch ---

NICK

1:02:55 It's pretty easy to do that really. I mean, if you got the, with the technology today, it's easy to dispatch as long as you have enough dispatchers that know your technicians well enough in that.

LAUREN

1:03:07 You can filter by the technicians like qualifications as well.

NICK

1:03:11 Sure. Sure. Let me ask you this on a let's say we do have a part that's back order. We don't know if it's coming in and it's under somebody's name. Where does that call? Where does that job go? Sitting? Waiting for that part? Where does it? How do you see that on the board? If you wanted to look at a bunch of?

LAUREN

1:03:34 I see Rick moving his mouse, Rick.

--- Dispatch ends ---

RICK

1:03:37 Yeah, I can, I'll repeat that again. I'm sorry.

NICK

1:03:42 So I got me, I always have a lot of things to do. And so if you look at my name on ours, now, I got a lot of stuff under my name. How does that stuff? Where does that go?

NICK

1:03:52 How do you keep track of it? Like let's say I got three parts that are coming in. Couple of them are back ordered. One might be in three days. Where does that service call? Where does that job go on the dispatch board? So we can see it or where it's gonna show up?

RICK

1:04:09 So pulling up the dispatch board.

LAUREN

1:04:11 So what I would do, I wouldn't go to the dispatch board for that. What I would do is I would go to the job search, so jobs and jobs. So there's a way to run a report for... let's search for type is service call. This might be too. No don't put a technician there and then put under jobs with sort of the second on the left from the bottom. You can search for jobs that have, that are unscheduled that have parts that have been ordered but not received. So you'll be able to run reports for things like that. When all of those parts have been received, your coordinators can basically run this report and then you'll have your bucket of jobs that are ready to be scheduled.

NICK

1:05:13 There's really no place to see it on a dispatch board.

SAM

1:05:15 Anywhere though, that would be convenient.

LAUREN

1:05:18 I can't think of a way you'd be able to do that on the dispatch board itself.

--- Dispatch ends ---

LAUREN

1:05:23 I can do some research and let you know like what best practices are, because just realistically, I'm not a dispatcher and I don't do it every day. Sure. But we'll do some, we'll do some research and get back to you. I think it can be done through either like tags or something like that, but I don't remember how to do it.

--- Dispatch ---

JESSE

1:05:43 We, we do have a lot of like return trip jobs because we're waiting for parts to come in or technician needs to come back. Like Nick was saying. So for our dispatcher to be able to quickly easily keep track of like how many, what are Fred's return trip jobs?

JESSE

1:06:00 What are, you know, Nick's return trip jobs, and like being able to take a look at that and compare case, should I send Nick to this new service call came in? And should I send him to one of his return trip jobs? That parts just came in like make decisions like that quick that's important for us?

NICK

1:06:17 Nice to be able to see that without running a report.

JESSE

1:06:20 Yeah.

NICK

1:06:20 I guess.

LAUREN

1:06:22 We'll just let you know what we learn.

SAM

1:06:24 Okay. If you think of you're talking about best practices if there's whether the CMS texts customer or if you have another customer that operates kinda like us. And if there's a way we could chat with them, just kinda see how they do it, that would be super helpful, something like that. If they like, they'll know how they do it. If they have the same type of workflow as us, a lot of break, fix and return and stuff.

--- *Type of work* ---

LAUREN

1:06:49 Yeah. Do you know, the folks down in Texas refrigeration specialists... they may be someone good to talk to. They do a ton of kitchen work like just a ton so much. So, they've got like four separate business entities. One for the hot one for the cold one, for the hood planning and one for the H vac. So, so they may be good folks to connect to you.

NICK

1:07:18 I said refrigeration, what?

LAUREN

1:07:20 Refrigeration specialists?

NICK

1:07:21 Specialist, I think.

LAUREN

1:07:23 That's the name of one of their companies, but well, I'll find you a reference.

NICK

1:07:28 Email that to me that'll be great.

SAM

1:07:30 For a...

RICK

1:07:36 So, that was kinda the dispatch kinda area that we were kinda talking about. But any other questions there?

--- Purchase decision ---

LAUREN

1:07:41 Yeah.

NICK

1:07:44 I don't think so.

RICK

1:07:45 Okay. Well, I was thinking and correct me if I'm wrong, Lauren, but I was thinking it might be helpful towards as we kind of finish things up here in a little bit to just kinda make sure that we understand the needs that you have for your technicians and a solution so that we can put some pricing together, put that in front of you for review and kinda get an idea if that's in your bracket range and kinda prepare for the timing of, you know, do you wanna go with a different solution? And if so here's, how service trade can really work within that scenario? So.

--- Purchase decision ends ---

NICK

1:08:21 I think one thing that Jesse and Sam would like to see is some of your reports?

RICK

1:08:26 So...

NICK

1:08:27 That's a big deal. I mean, we covered a lot of stuff that's a big deal for me, but there's a lot of reporting stuff they would like to.

SAM

1:08:35 Or, or how it works at.

JESSE

1:08:37 That, yeah. And then how the whole quick book integrations, processing, payments, figuring out how many customers owe us collections like those are all.

NICK

1:08:51 The technician efficiency.

SAM

1:08:56 Yeah, job costing profitability for areas that's the report stuff that I'm interested in... like being able to run reports to see profitability for the different areas.

SAM

1:09:10 So, how is our H back? How is our food equipment? How is our refrigeration? And then, how like how profitable is Omaha versus Lincoln? How profitable is this tech versus another tech? Being able to kinda see reports to know what areas are performing and where areas for improvement?

LAUREN

1:09:28 Sure. I can pull that up. If you wanna see some examples. I just need to log in really quick. Give me one second. Let's see. We have one of these. It's one of those passwords that's like a bazillion letters in. Is that I don't have to look at the.

RICK

1:09:59 Come on, rain, man, Lauren.

LAUREN

1:10:01 It's literally like 24 characters. Okay. Hold us over. Here we go. And where did you guys go? All right?

LAUREN

1:10:22 Okay. All right. Can you see my screen there?

NICK

1:10:26 Huh. Yeah. Yeah.

LAUREN

1:10:28 So, this is just one example dashboard that we have for reporting.

--- *Assets* ---

LAUREN

1:10:33 We call it our boost, revenue dashboard and margin dashboard, and it shows a lot of what you just asked instead of breaking out the revenue by type of service, like you just listed H back, refrigeration, kitchen equipment, etcetera. This report breaks it out by type, by work order type, but you can filter by service line as well or by office at.

--- *Quoting* ---

SAM

1:10:58 Actually.

LAUREN

1:10:59 This report filtered to all the offices. But if I had more than one office associated with this account, I'd be able to kind of filter by an individual office there. You can see things like see things like revenue by month, the biggest open quotes, your quote approval rate, things like that, your quote pipeline.

--- *Assets* ---

LAUREN

1:11:21 So we have a lot of quotes specific reporting since that's a huge piece of our data model out of repair opportunities by reporter. This is actually the concept of the deficiency in service trade. So the user would be the technician. And then the quantity of efficiencies kinda reflects in this bar column here.

--- *Quoting* ---

LAUREN

1:11:44 So you can see which technicians are identifying the most opportunities... to quote work out. You can also see the status of those deficiencies and where they are in the quote life. Cycle. And then from like a profitability standpoint, again, I don't have exactly the profitability report that you just asked for, but you're able to run reports like that.

--- *Customer engagement* ---

LAUREN

1:12:11 This actually shows the revenue distribution by customer and the margin for that customer. So this is a good indicator of which are more valuable to you. I'm

guessing your big customers, you're having to perform more work and you have lower margin for maybe like the service channel eco track users of the world.

--- *Quoting* ---

LAUREN

1:12:33 But you may have someone like this who you're doing less service calls and your margins are higher. So you can drill into that one specific customer and see just the metrics for them. You can see our quote approval rate for all of the customers. It's about 70 percent, but this customer is about 80 percent.

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

LAUREN

1:12:54 So maybe we go all in on this customer, make them a P1 or whatnot. So you're gonna have the ability to see a lot of different reports like that?

SAM

1:13:04 And creating these dashboards, is this something that you have to have special technical knowledge to do? Or is it something that if, you know, have kind of basic technical knowledge or even modern technical knowledge, you get figured out putting together.

LAUREN

1:13:18 So this just kinda comes with the enterprise subscription of service trade. If you wanted to create your own reports, it does require a little bit of technical, know how we also have internal technical account managers that can help you do that. It's basically like a service trade expert on retainer for X amount of hours a month and they can build custom reports for you too. So little column be depending on your tech, sophistication and needs and budget and things like that.

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

RICK

1:13:54 Now, if you wanted to, Lauren, I did have an example maybe of a project that kinda shows it just for one specific project with that kind a price break down or we can just set up a separate meeting if that might be important too, rather than just looking for a holistic view of all your customers and these charts like this, you know?

LAUREN

1:14:11 Well, I'll just hear to them and what they wanna see.

SAM

1:14:16 Yeah. This has been helpful to see the overall thing. If you have one set up for just like one job rack already, I'll be happy to see that. And then we can move on to some of Jesse stuff.

RICK

1:14:25 Yeah. So this is very rudimentary because we, I just saw this the other day, but we added some new features that kinda get into, you know, and you can turn a quote or a job into a project. And we showed a little bit about that the other day and I just wanted to kinda turn one of these into a project to kinda give you an idea what that might look like. And so I can take a look at some details of project and see some of the information like this for one specific project. You know, the estimated margin, the all value where I'm at... using this kind of donut look, you can kinda get an idea as you're familiar with these jobs and the types of numbers you're trying to see. You can kinda see how things go. So again, I'm very, this is kind of just an introduction to something that might be helpful and we can get into the details of this if it's important to.

JESSE

1:15:25 Is there a way you can look at a finished job to see what your margin was on a particular job and then see, okay, this much of our cost was labor, this much of our cost was materials?

LAUREN

1:15:37 Every single job in service trade, you'll be able to see that?

JESSE

1:15:41 Okay. What if you have multiple technicians? Can I break down? This technician had this much labor cost? This technician had this much labor cost? Is there, can you do that in particular jobs?

LAUREN

1:15:55 You can, that requires some pretty diligent data capture by you and your team.

--- *Pricing* ---

LAUREN

1:16:06 You can assign labor to specific technicians when it comes to running some reports on service trade like revenue per tech, like per week or something?

JESSE

1:16:20 I...

LAUREN

1:16:21 I know what it does, is... it'll just split it in two or three or four depending on how many technicians are on that job. So, yes, but no, depending on what you're looking at, it's not.

--- *Pricing ends* ---

NICK

1:16:39 So that...

SAM

1:16:39 Split just happens automatically based off of how the number because you can't adjust that split?

LAUREN

1:16:46 No, no.

NICK

1:16:49 Okay. One question going back a little bit on making up a call, say, so we have guys that are on call after hour 24 seven. So the guys on the weekend need to make up their own work orders. Can you do that on the mobile app?

--- Access to information ---

LAUREN

1:17:03 Yes, that is a per user permission based setting. So.

NICK

1:17:08 Now, can that, let's say that technician needs help? Nobody in the office to add the other guy to that job? Can the technician that made up the work order add somebody else to it?

LAUREN

1:17:19 Let me test that out really quick. Let's see.

--- Access to information ends ---

NICK

1:17:24 We can't do that now. And another one we looked at can do that. I was just question.

LAUREN

1:17:31 Are you looking at?

NICK

1:17:34 What other one?

JESSE

1:17:34 BuildOps and Davis?

SAM

1:17:38 Where?

LAUREN

1:17:39 Okay. Let's see. I'm pulling up my... I'm gonna create a job. I think I can add another tech to it but I might not be able to... how would they know? How would they know who to add to it?

JESSE

1:17:59 Because they're standing?

SAM

1:18:01 Yeah, I will be out.

JESSE

1:18:04 I was joking to.

SAM

1:18:08 The technician will be out working on it, and then he'll say I need a second set of hands. He'll call the, one of the other guys and the guy will drive out there and help them. So that's all the weekend.

NICK

1:18:18 Not very often that happens but it does.

LAUREN

1:18:22 I'll have to check. I can't see a way write the second to do it, but I'll check with the folks that are smarter than me. I haven't I don't think I've been asked that before. Why would that be important? Just so you can, so they can both be working on the same work.

--- Tech time tracking ---

NICK

1:18:40 Just that way the office doesn't have to do it on Monday. It's already under his name and he can put his time in. Otherwise, the office has to do it and then their person to keeping track of the time cards has to go in there and put his time in and all that.

--- Invoicing ---

LAUREN

1:18:54 Yeah, yeah.

NICK

I jumped back there backwards.

LAUREN

1:18:59 No worries. No worries. What other questions do you have that we can help answer?

JESSE

1:19:05 What a payment processing? Can, you know, most of the time we process payments in the office, maybe five percent, the technician does out in the field, it's nice if they have that opportunity to run a credit card or say they got a check for this dollar amount, but most of it's in the office. Yeah. So how does pay, how do payments get processed through service tighten? Or we have Quickbooks right now, we process all our payments through sorry service trade. We process them through service tighten right now anyway.

LAUREN

1:19:37 Yeah. So because we were designed for commercial, that was never like a part of our application like out of the box, if you want to do credit card swipes in the fields like you would need like square or stripe or something like that. That's not to say the tech can't create an invoice in the field, like they could create an invoice and email it to the customer, and they simply have to go through the same process that you all did when Rick sent you the invoice. And actually just like open the invoice and click pay.

--- Invoicing ends ---

LAUREN

1:20:09 Now. So, so it's just like you said, it's not super common for our customers. But since you're working in restaurants, you don't know if they're gonna be open in four months like get the payment, you know?

NICK

1:20:20 A lot of times a new customer we demand there soon.

LAUREN

1:20:23 Yes.

NICK

1:20:24 It's a big company that doesn't I can't do that, but a lot of small mom pop places we say that or some of them are just the COD anyway, you know?

LAUREN

1:20:32 Yeah, there, there's certainly a way you can do it. And just like the field scheduling like the on call scheduling, creating invoices in the field is a per user permission based setting. You've got newer. You don't want to do that, then they don't even need to know that they can.

JESSE

1:20:52 Is, is there a way I can look up and see which customers are? Because most of our customers are net 30. Is there a way I can do an accounts receivable report or something like that to see who owes us and then is there an ability to flag customers? Like we have something called the do not schedule list, which is that customer needs to pay their past due before we'll go out and do any more work?

LAUREN

1:21:14 Yeah, you can run reports for invoices of different statuses. If they're past do, etcetera. You can also tag customers as like nonpayment or COD or whatnot, you.

NICK

1:21:29 When you type them up to do a job, it'll flag it saying, hey, this customer owes us money. Don't go to whatever.

LAUREN

1:21:35 Yeah, it'll you can absolutely do that. You can also use tags for things like the job status is like we talked about waiting for parts like.

NICK

1:21:44 Right.

LAUREN

1:21:45 You...

NICK

1:21:46 Just, are those tags color coded? They can?

LAUREN

1:21:51 Yeah. There's actually a.

SAM

1:21:53 They are.

NICK

1:21:54 Now, and the girls like that. And the last war we looked at, they're not because they're just black and white.

LAUREN

1:21:59 I don't know why we did this, but our VP of customer solutions made this thing where the tags like can like change colors and be like rainbows and like dance around. I do not know why we needed to do that, but that's a choice account.

--- Invoicing ---

JESSE

1:22:18 What is there a way? Because I, you know, doing collections with customers and I say collections, I don't mean sending them to a collection company. I mean, just like trying to click past, you, can you send out like bulk statements to customers or if we have their email address, stuff like that?

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

LAUREN

1:22:36 Yeah. So what Rick has pulled up on the screen here is the invoice report. He just clicked, he selected all. And if you click that to the right of that thing, he's not gonna send all of this to the customer. But if you click send to customer, click send to customer and then he'd have the ability to bulk resend those quotes to the customer. Do not do that, please, Rick.

--- Invoicing ---

RICK

1:23:02 Right.

LAUREN

1:23:05 But that's how he would do it. You also noticed there was a there's the option to bulk, send all those invoices to your accounting system. I can set up a call with our Quickbooks integration expert to kinda go more into depth into how that works. Do you have online or desktop?

--- Accounting integrations ---

JESSE

1:23:24 It's it's desktop. We did that because with service tighten to actually keep track of if we wanted to do, we're not, we don't really do inventory tracking, but some day we do want to, and they said desktop was better for that. So that's why we ended pick an Quickbooks desktop, but.

LAUREN

1:23:43 ServiceTitan send that Quickbooks desktop was better than Quickbooks online.

JESSE

1:23:49 For inventory tracking, but we're not even doing inventory tracking yet. So.

LAUREN

1:23:55 Yeah, service take can do inventory tracking for what it's worth. I'm sorry, they told you that because desktop has limitations for almost everything else related to pushing information from point a to point B, but that's not just say it's impossible. So, maybe what we'll do is connect you with Diane. She's actually a controller at a mechanical contractor in Texas and she's really super knowledgeable on Quickbooks.

JESSE

1:24:31 Okay. Well, and I don't know how a transition would hap, if we ever, I don't know how that would work if we've changed our mind sometimes and want to do Quickbooks online. How Quickbooks is about transitioning over and stuff like that. I mean, I'm always open to that sort of stuff. I just don't know anything about what that transition would be like. I have to look into it. So.

LAUREN

1:24:48 Yeah, I personally don't know cause but that'll be a great question for Diane.

--- Accounting integrations ends ---

RICK

1:24:53 Yes.

SAM

1:24:54 Okay. And Lauren, you've done transitions for other customers from service side to ServiceTrade.

LAUREN

1:25:02 We have, yeah.

SAM

1:25:04 What is the, is there, how much of the data can we, could we pull out of service tight and be able to get into service, right? Is that possible? Or do we have to start fresh or is there certain things that we won't be able to pull over? Have you had experience with that before?

--- Assets ---

LAUREN

1:25:19 Have, yeah. So we have import templates for things like your customer list, your parts, list, your recurring services, which would be like your plan maintenances, and then your assets. I know the service tightened data model is slightly different from the service trade data model and that they added assets later since commercial was sort of an afterthought to the residential that they did so assets is something that can be pulled out.

LAUREN

1:25:51 It does need to be reformatted before you import it into service trade. So, so we've certainly done it before. The, probably the only limitation would be like historical information, like actual past work orders. When we set up your account, we don't actually create work orders that represent something that happened in the past that's not to say that you can't get that information out of service tighten and put it in some sort of format, maybe like a, on each site as an attachment. But we certainly have experience with moving folks from service tighten to service trade.

--- Implementation and ongoing support ---

NICK

1:26:30 How long the process is that usually?

LAUREN

1:26:32 The implementation process for companies your size that are implementing service trade and have Quickbooks and are already using a system that we can export information to and import into service trade probably about 90 days.

RICK

1:26:53 Okay. So September, August, July, you're probably looking by end of June, right? Or maybe beginning of June, we'd wanna start implementing?

JESSE

1:27:08 Yeah. Yeah. Because we'd be, we'd have to, we'd have to flip over before September 20 third. Probably. So whether it on September first or something like that. So, so start the 90 stay. So what the end of may or something like that? So, so, yeah, and for us, you know, ideally if we could pick the time we would like to flip over, it would be like this time next year, cause like, you know, February, March, stuff like that, those two months are our slowest but, you know, with our contract with service tighten, you know, not sure if that's possible.

--- Purchase decision ---

JESSE

1:27:50 So, so we're looking at, yeah, I mean, I don't know, we'll have to, we'll have to see. Yeah, I mean, ideally, I don't know. Is that what we're looking at guys? Do you think like we can talk about this internally a little bit too about what our move date is, but.

RICK

1:28:08 If you need any reassurance on our onboarding process and the steps, you know, we can certainly work with you to make sure you understand how that process would fit into your business, you know, as you're working into the busy season, you know?

NICK

1:28:23 Other than that Quickbooks, just so you same, do you guys need to see anything else you think?

--- Purchase decision ends ---

JESSE

1:28:31 Probably, I'd probably like to see a little bit about how we have different customers, we have different pricing for on labor and then interested to see how I'm assuming, you know, how we can mark up like the way our default our system is now is anything that we order on a purchase order?

--- Pricing ---

JESSE

1:28:52 We have a markup table for that where we, you know, if it's zero to 25 dollars, we mark it up 270 percent. If it's 26 dollars to 75 dollars, we market up, you know, 220 percent whatever. And then, but then for inventory items that guys carry on their truck or we have in stock in the shop, we have a flat price for those.

--- ST app contracts and pricing ---

JESSE

1:29:15 So like for, if we always stock... a third step, we just charge 220 dollars for this type of thermostat. So if those two ways of doing pricing can fit.

LAUREN

1:29:28 Yeah. We have a really sophisticated pricing model look and see Rick if the standard pricing agreement you can pull up.

--- Pricing ---

RICK

1:29:43 I probably clicked on their own thing just right there... that.

LAUREN

1:29:48 You can do it based on like a sliding scale. Like anything between zero and 25 dollars, is a 50 percent markup. Anything from 26 to 50 is a 40 percent markup. You do that. You can just do straight mark ups.

--- ST app contracts and pricing ---

LAUREN

1:30:01 You can have customer specific pricing to default for like that one site for instance, and maybe their labor rates differ... from your standard labor rates. You

can save that. So, so our contract pricing is pretty sophisticated.

JESSE

1:30:21 Can I, can I do something where if it's been purchased through as a purchase order that it has a mark up, you know, like let's say it's some part we've never purchased.

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

JESSE

1:30:34 We have a lot, we purchased a lot of parts that we've never purchased before. That happens all the time. So we don't have this part like pre entered into our system. You know, we just always have a default anything or through a purchase order automatically marks it up. Like according to this scale, do you have something like that in your?

--- ST app contracts and pricing ---

LAUREN

1:30:55 Like, let me clarify what I think you mean. So if I bought an ad hog part and it cost me, it cost the company 50 dollars based on your mark up scale, it would market up X amount. Is that what you're asking?

JESSE

1:31:09 Yeah. Yeah.

LAUREN

1:31:10 That's how it works.

JESSE

1:31:12 Okay. Okay. That's how we do for all of our ad hog parts or we call them purchase order parts. But then any of our items that we carry in our inventory, we don't use a markup scale. We just have a like a flat markup for those things, not even a mark price, a flat price for all of them. And service tighten has had some trouble figuring that out for us like it's like either it's like either everything needs to be marked up or everything needs to be set as a flat price that we can't have, you know, both, we have to do some crazy workarounds to get it to get it to somewhat work right now, so.

--- Parts management (inventory) ---

LAUREN

1:31:52 What you're describing is not a process that I, I'm familiar with where you have different markups or different... like pricing models. I don't know exactly what to call it or differently purchased things. What we wanna do when we talk about Quickbooks is also talk a little bit about our parts of inventory management on.

LAUREN

1:32:17 So you can understand how that works with service trade, how it might work with Quickbooks, and then get some of your, some of your markup and costing questions. That does a lot of that.

JESSE

1:32:31 That be that'd be great.

LAUREN

1:32:33 Yeah. I think that would be a good exercise to go through when we talk through the Quickbooks stuff since there's a lot of overlap there.

--- Recurring maintenance ---

JESSE

1:32:39 Yeah. The other one, Sam, I know you're kind of working in maintenance right now. Do you want to get a feel more for... how maintenance is scheduled?

SAM

1:32:52 I guess, yeah, not just scheduled, but then.

JESSE

1:32:55 Like a new customer, how we set up work sorry?

SAM

1:32:58 Well, yeah. Yeah. Yeah.

--- Type of work ---

SAM

1:33:01 Scheduling maintenance S for reoccurring maintenance or certain times like we'll have we'll do we'll go to the same customer multiple times but do like different services? Basically, the way you guys talk about services in that will do a service for just refrigeration, reaching coolers and stuff which is different than when we do the H fac ones.

--- Type of work ends ---

SAM

1:33:21 Sometimes the timing works that they overlap. Sometimes the timing works that they don't overlap because if we go and change out filters on rooftop unit, four

times a year, we might go instead for changing working on reaching or six times a year. So sometimes they do, I schedule.

--- Assets ---

SAM

1:33:39 So we're trying to figure out a method to be able to schedule things. So they organize as well as possible. So kind of seeing how the scheduling works. And then when guys go and do the maintenance... is there an ability to have sort of task list of specific things they need to accomplish when they're doing the maintenance and like uploading photos like I, I'm gonna go clean this ice machine.

--- Deficiencies ---

SAM

1:34:01 They go, they take a picture before they start to take a picture of the ice machine before it started cleaning. So dirty is then they take a picture afterwards. When they're done... different things like that. They have to go through in order before they can finish the maintenance?

--- Deficiencies ends ---

LAUREN

1:34:13 Yeah, we certainly have workflows like that for context. I don't know if this was clear at the start of the call. But... as Rick mentioned, we were designed specifically for commercial. We've been doing the same thing for the last 10 years. And one of the reasons that distinguish us from like service tighten who kinda got their start and residential, for instance, is our data model supports the idea of going to the same customer over and over again instead of just one customer.

--- Recurring maintenance ---

LAUREN

1:34:50 And then you try to upsell them in the driveway. So, so our data model is very much centered around the assets and then a recurring service related to those assets or pieces of equipment. And then the tasking associated with those services. So you certainly input all that information into service trade, create templates for the different types of services you provide, and then run reports that say, show me all the services due this month for this customer.

--- Recurring maintenance ends ---

LAUREN

1:35:23 And then you can put all these services on one work order to try to reduce the amount of trips to that one cost, get everything done exactly.

SAM

1:35:32 That.

LAUREN

1:35:34 Is literally the raise on Dutch for service trade.

SAM

1:35:36 Okay. That's I got the sense of that. That's why I wasn't pushing it earlier because as Rick was going through his demos, it looked very preventative maintenance heavy, which is an area that we see a lot of potential in, but we've just never had a software that made it really easy for us. And so that's part of our transition of figuring out. And it looks like you guys, it seems that you guys are built that way just by looking at.

LAUREN

1:36:01 Yeah. Yep. That's next.

NICK

1:36:07 Cool. And the last thing is how much?

LAUREN

1:36:12 Right.

RICK

1:36:12 I was gonna ask, you know, in terms of a number of field technicians and all just to clarify some of the details.

--- Pricing ---

NICK

1:36:18 Yeah. Right now, we get what? 20 sixth?

JESSE

1:36:21 Yeah... yep.

NICK

1:36:24 With, with plans to grow, you know, a technician here and there as we go. So, you know, we might see in a year, we might have 30?

SAM

1:36:33 Or, yeah, I mean, because you...

NICK

1:36:36 Go back.

SAM

1:36:36 If he accepted or not, but I know Nick, you had, you have a couple of guys out there right now... that you have job, right? So we could be at 28.

--- Pricing ends ---

NICK

1:36:47 I have a guy that start in a few weeks. There's another guy. I got a call and talk to you yet, but a little bit, but moving.

SAM

1:36:54 So I'd say, yeah, we'll losing some guys just how it goes but we're easily. We could be at 30 by the end of the year.

--- Pricing ---

RICK

1:37:02 So, we should probably quote 30 just to give you that kind of understanding sounds like.

JESSE

1:37:08 I definitely don't want to pay for 30 right now if we don't...

SAM

1:37:10 Yeah. And I guess how your pricing model works like is.

NICK

1:37:14 Everybody coming.

SAM

1:37:15 Number that we're stuck at, but then we can add hock up and down above that or.

LAUREN

1:37:19 Yeah. So from what we're talking about today, I see you all being on either our premium plan or our enterprise plan. So using the amount of technicians that you have now, we only charge for the text or the folks that need the mobile app. Everybody else is free because you guys are overhead depending on the features and functionalities and sort of the rollout plan. I imagine you all are gonna be somewhere in the 50 to 80 K range for your first years investment of that number, about 10 K. I'm allocating for like one time implementation services, but that we're as a SaaS company, we are subscription based either annual or multiple years. We have more flexibility on the pricing. The more years you're willing to commit. I know that may be a source subject considering what's going on with you all in service tighten... but it does the 50 to 80 K range sort of align with where you were imagining you would be?

NICK

1:38:34 I don't know it's...

JESSE

1:38:36 Not...

NICK

1:38:37 Exactly sure what we're paying now.

JESSE

1:38:38 Yeah. Let me...

NICK

1:38:40 That seems.

LAUREN

1:38:44 Okay. I know we are more expensive than the other applications you're considering. So, but we've got 10 years of research and development in our product... and there's inflation. So we've gotta make sure we're paying our Bill.

--- Pricing ends ---

RICK

1:39:04 And plus that industry report I'll give you, I'd advise you to take a look at that, that's actual service trade customers over the 1,000 we had and what their experience has been, and they're proven results of that investment. I think that's going to be critical too. We have a 96 percent retention rate of customers that decided to go with us rather than customers that are saying, hey, something's wrong with ServiceTrade, I mean, 96 percent is huge. So just something to consider in your decision. You know, we're solid.

--- Pricing ---

JESSE

1:39:34 Where, when you 96 percent retention rate... is that after one year or two years or do you know?

RICK

1:39:44 I guess what I can do is work with you, Lauren on that and get the details from our side, but.

LAUREN

1:39:50 It's it's just our, it's our net retention. It's not broken out by year.

JESSE

1:39:55 Okay.

NICK

1:39:57 What is your lowest entry or your lowest package? What's it called?

LAUREN

1:40:02 The select plan? I believe it is 89 a month attach... what you?

JESSE

1:40:13 Go ahead. No, no, you're fine. I'm interrupting you. You're fine. Go.

LAUREN

1:40:17 What I was gonna say, what you don't get with that plan that you all expressed interest in was the contract pricing, like the customer specific pricing rates. Some of the project management functionality that we have is available on premium and up. And then if the parts in inventory management was something you eventually wanted to explore, you would need to be on our premium plan at.

NICK

1:40:45 The premium, the next one up from that one. Yeah. And how much is that protect?

LAUREN

1:40:50 That's one 39 per tech per month.

NICK

1:40:53 Gotcha.

JESSE

1:40:54 And then what's the difference between? And I got your website pulled up here so I can see kind of what I listed. But what would be the advantage to go into to enterprise? It sounds like maybe we're kind of the way our size is, I see, you know, it says premium best for 10 to 20 enterprise best for 20 plus and we're you know, 26, 25 27. So we're probably kind of like in this in between stage, but that's my guess.

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

LAUREN

1:41:20 Biggest advantage to enterprise is this reporting dashboards, a lot of folks your size will opt to start on premium because if you think about it, you're not going to be getting all of the necessary data to populate those reports from day one anyway. So you can start on premium and then upgrade your service trade account to enterprise

when you see fit either at your renewal or you can do early renewals as well if you're like we need this reporting now. So there's flexibility there.

--- Pricing ---

NICK

1:41:55 That enterprises, how much protect?

LAUREN

1:41:58 189 per tech per month?

JESSE

1:42:01 It says geographical regions is one of the things that's added in enterprise. What, the reason, what I'm thinking because we do kinda separate Lincoln from Omaha. And then we have one technician that's kinda out west Nebraska. What's...

--- Dispatch ---

LAUREN

1:42:16 Honestly, that's kinda one of those features that I think they just put there to make it seem like more stuff you can do your LinkedIn office, your Omaha office, and then your other office like you can delineate that without needing enterprise. The idea of geographical regions is actually, you take a little tool and you draw like a blob on your map to represent X region. I don't think that's the reason to go with enterprise.

--- Recurring maintenance ---

JESSE

1:42:49 Yeah, we might tie into the report. Like right now, we do like to run report. You know, we'd like to run reports that show how did Lincoln sales go compared to a sales? How did Lincoln?

LAUREN

1:43:02 You'll still?

JESSE

1:43:02 Be able?

LAUREN

1:43:03 To do that. If you're break your company, your service trade account into your different offices.

--- Pricing ---

JESSE

1:43:10 Okay. Okay.

LAUREN

1:43:11 It's a slightly different thing. It's just something different.

JESSE

1:43:17 And then I'm trying to remember Rick you may have mentioned this last time. I can't remember. So I say, I know we pay per technician. Is there a like an, on an initial like onboarding payment we have to make or a lump payment upfront? Or is it all just per technician?

LAUREN

1:43:33 There is an... onboarding fee? So I'm guessing for a company your size, about 10 K would be the onboarding. This is just kind of me doing quick math, some firmer numbers, so sort of a basis of.

RICK

1:43:51 I can also detail, you know, what's involved in that. So, you understand because it's a pretty, you know, involved process.

--- Implementation and ongoing support ---

RICK

1:43:57 If you go like with enterprise, you get a project manager. We have steps that we work with you and agree upon to make sure we're in line with your time line. So we really do get involved.

LAUREN

1:44:08 I'll get a project manager regardless. So you'll have dedicated service trade resources to guide you through the implementation process.

NICK

1:44:18 Okay. Cool.

SAM

1:44:19 So, Lauren, you're saying the reporting is on the enterprise, is it, is there no reporting on premium or is it just deal with the fancy dashboards or what's the?

LAUREN

1:44:30 Just the fancy dashboards?

SAM

1:44:33 It's just the fancy dashboards. Okay? So I can still at least get like excel reports and stuff like that of like what? And like be able to get some numbers of like what job profitability is and stuff like that?

--- *Pricing* ---

LAUREN

1:44:48 Yeah. 100 percent.

RICK

1:44:57 Any other questions there on the pricing I think that we need? I think we're probably looking at, would you say the premium just to quote that out, say for 30 to give you an idea? Would that range be acceptable?

NICK

1:45:10 Can, can you add, if we just have 25 technicians? Can we go there and add as you go and say, hey, we got two more technicians and then you just charge appropriately, yeah, this, right? And then you lose technicians, you take away too.

LAUREN

1:45:25 No, start with the minimum of what you need. So I think Rick we should price them for the exact number that they have right now. And, you know, if you go over that, we can prorate them but just sign up for the minimum of what you need.

NICK

1:45:42 And then, and then after your year to your contract whatever, then you look at that number again and then you go up. That. Is that how that works? Okay?

LAUREN

1:45:50 Yeah.

RICK

1:45:52 And right now you go, again, that was 26, I think, right?

NICK

1:45:54 I, something like that?

JESSE

1:45:57 Yeah, I think, yeah, I think we're at 26 is how many we're at right now. I mean, I can actually tell.

LAUREN

1:46:03 We'll pull pricing together for 26 and if it's different, just let us know.

RICK

1:46:08 Yeah. There you go.

                                    JESSE

1:46:09 It's a.

                                    NICK

1:46:10 Little one sided where you have to charge more for, no, but if we lose some,
you, we, you still charge for the other ones isn't it?

                                    LAUREN

1:46:17 I know that's a fast thing, but, you know, if you're running your business the
way we believe you're running your business, you're going to be paying us more next
year because you're going to be consuming more of our product. You're going to be
growing your business. Our customers are fine paying us more because they're
seeing a return on their investment. I think on average about 25 percent growth is
what people see after implementing service trade. So, so, yeah, I see what I see what
you're saying. But generally speaking, that's why I recommend just start with the
minimum of what you need.

                              --- Pricing ends ---

                                    NICK

1:46:50 Right, right.

                                    JESSE

1:46:51 So, for technicians, when this new guy comes on board, Nick, we'll have 26
technicians. So that's our exact number that.

                                    NICK

1:47:02 Dan's interviewing somebody right now too. I think.

                                    JESSE

1:47:06 Okay.

                                    NICK

1:47:07 We're been talking. I mean, that's those are none of those are in that guy that
I'm talking to in Utah, they, that's not for sure. Did you take Warren offer there
Jesse?

                                    JESSE

1:47:19 Well, not yet, but the new guide at starting will take his place.

                                    NICK

1:47:22 Okay. Okay. Yeah. So yeah, you say, so you say your customers when they implement service trade, the 25 percent increase, is that coming from another, that they came from another like a service tighten or something or is that not having anything in implementing your stuff?

--- Pricing ---

LAUREN

1:47:41 Generally, if you'd asked me this question seven years ago, when I started a service trade, I'd say they just came from using paper and so, but nowadays it's rare that we work with people that are coming off of paper.

NICK

1:47:54 Right. And that are really.

LAUREN

1:47:56 Yeah, that 25 percent is across all of our 1,000 customers.

--- Pricing ends ---

LAUREN

1:48:01 With some exceptions. We kinda took some outliers out of our sample size, like if they were growing crazy through like acquisitions or whatever. But most often people are using something whether it's another best of breed application or like an accounting plugin. And the reason most people are seeing that growth is the pull through is documenting the problems, better, quoting those out to the customer and then getting that subsequent follow up work schedule that's the biggest difference maker.

NICK

1:48:34 Yeah. If you could give me some, you know, a referral, like, you know, that refrigeration specialist, or if you got a couple of users that I wouldn't mind talking to, just asking them of some of the processes they're going through. And on my end, I'm more on the service tech side, on the mobile side or I do billing or even the desktop, I'll you know, look at that, but I'll have questions there and I'm sure Jesse would have questions on the other stuff. Just it's nice to know somebody that's had experience with it. Just see what they say.

LAUREN

1:49:02 For sure, we work with plenty of customers that do exactly what you do. So I'll work on getting a couple for you to talk to. I'll help you coordinate a conversation with them.

NICK

1:49:15 I appreciate it.

RICK

JESSE

1:49:36 Yeah. Well, I think, yeah, we were gonna go over a bit more of the Quickbooks integration and the parts and inventory stuff too. So.

NICK

1:49:43 And I have to be in on that one. I think that just you and probably you and Sam or maybe.

JESSE

1:49:49 That's fine.

RICK

1:49:51 Okay. Sounds good. And if you're thinking, you know, maybe I can work on our side check with Diane, maybe set up something for next week, you think? Or? Okay, gotcha. I'll see if I can schedule something. I'll chat with you on a date. How's that Jesse?

JESSE

1:50:04 Yeah, that sounds great.

RICK

1:50:07 Okay. Well, Sam, Nick, Jesse, anything else that we can address for you? Any other questions?

JESSE

1:50:15 Good. I appreciate that already, you all show.

NICK

1:50:19 I appreciate getting up at six out there too.

RICK

1:50:22 Normally start at six 30, but Lauren doesn't like me doing that, but luckily, she's okay with us a.

LAUREN

1:50:28 Get up extra early to walk my dogs because my partner is not here this week.

NICK

1:50:32 Where are you? Where are you from? Lauren?

LAUREN

1:50:35 I'm in Huntington Beach, California.

NICK

1:50:37 Okay. And what is that at?

LAUREN

1:50:39 That's in orange county. So, I'm just south of la.

NICK

1:50:42 Okay. My daughter's actually in san Clement right now. No, why three friends drove out there from Nebraska.

LAUREN

1:50:53 My goodness. What a fun road trip. I'm sure that was.

NICK

1:50:56 Yeah, she said it was fun. Go see a lot, you know, sometimes driving across country is a lot of fun, you see?

RICK

1:51:02 Yeah, yes, to be in Chicago, so, I made that trip often coming down here to see my wife.

JESSE

1:51:09 I don't like.

NICK

1:51:10 Diago.

RICK

1:51:13 Yeah. Stay away from there. Now. Those tools will kill you.

JESSE

1:51:15 Yeah.

LAUREN

1:51:18 Get to work on these action items. We'll follow up for some times for Quickbooks parts management conversation, and then get some pricing... and there's other references and resources area to.

NICK

1:51:34 Perfect. Appreciate your time. Thank you.

                              JESSE

1:51:36 Thank you.

                              RICK

1:51:36 Thank you. Have a great day.

                              NICK

1:51:38 You too.

                              RICK

1:51:39 Talk to you soon.

                         The End