



# **ServiceTrade Account Health Review**

David Teeter with Western Allied Mechanical, Inc.  
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## **Participants**

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# Transcript

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

DAVID

0:00 Good morning, Jeremy.

JEREMY

0:01 How are you?

DAVID

0:02 Hey, doing a lot better than it was a couple of days ago that?

JEREMY

0:05 For sure. You had a challenging start the year.

DAVID

0:08 Yeah, man. I'm Tony. Well, I guess, you know, all in all, you know, am grateful we all got through it. Okay? And now like layer of anxiety that's been running this entire time, it's kind of like not as bad.

*--- Small Talk ---*

JEREMY

0:22 Yeah. Yeah. You get, I guess an out for the next few months, you know?

DAVID

0:26 Yeah.

JEREMY

0:27 I'm here any good for probably at least 90 days?

DAVID

0:30 Yeah, exactly. So.

JEREMY

0:31 Here at?

DAVID

0:33 It just with one right after another, just felt like dominoes but our little list, two year old, she got sick one day with a really high fever and she was fine the next day like nothing here. And then I was the one taking care of her. Okay? I got it. Our son got it and then my wife Jessica on it. So it's just like one ratio.

JEREMY

0:52 Yeah. You guys both feeling better now though?

DAVID

0:55 Yeah. Yeah. I just got lingering congestion and stuff, but other than that should be feel pretty normal wake up like as I'm doing anymore. So that's good.

JEREMY

1:04 Yeah. I was just talking to one of my text yesterday. He tested positive in a week and a half ago or so and it did not come down pretty good even though fully vaccinated and everything. Yep. And then he came back to work this week, tested positive. Three birds.

--- Small Talk ends ---

JEREMY

1:18 I tested negative three different times, not in the system anymore, but he's still got the lingering, yeah, hold symptoms. He's still congested running those kinds of things. So, apparently, I mean, even when you negative, it's still kind of in your system, so.

DAVID

1:32 Yeah. Yeah. Whatever it does and what, whatever it does affect your system takes a while to like he'll.

JEREMY

1:38 Yeah. Yeah. Well, as long as it doesn't turn into long COVID, I guess that's kind of the... the biggest nightmare risk and all of it. So.

DAVID

1:47 Yeah, every day. Yup. Yep, sure. Am. I appreciate your flexibility with that haven't move it to today. So, yeah, typically, yeah, the reach out that I initially did for you, it's just kind of what we do typically with everybody. Like we talked about the account health. I mean, I get the account kickoff with me. Was the review that we do with everybody kind of higher level view of how you're utilizing the service training so you can see top to bottom how things are going.

JEREMY

2:16 Yeah. And I mean, in all honesty, I'm not super interested in that. I am, but I'm not, I... I have a pretty good idea of how we're utilizing it. How we're not where we're effective, where we're not, you know, we're still actively trying to push towards getting better things and tweaking there. So I think if there's anything monumental, you need to share it. Great... great, but I don't necessarily need a health check on our. I wanted to take the opportunity to check in with you. Yeah, mostly, I mean kind of broader picture. How are things going with service trade? What sort of enhancements or, you know, coming in the pipeline here? Yeah. And then also, I would really want to get rolling on some sort of reporting in on. I think we have made a decision on a... a BI tool as a company to go forward with, but it's gonna be several months before it even gets around us and service constructed is going to be implementing it first. Okay? It's probably gonna be summer before you there even launched on it. So we'll be lucky if by end of the year, we're in it and surface up. I want to do something in the meantime and want to look at Amazon quick site and that's what you guys are most familiar with comfortable with and can help us set that up and... and get that integrated. So I wanted to talk that through with you, get... get some thoughts there and... and see really how soon you may be able to help us roll with that once we start paying an Amazon and... and get accounts that.

DAVID

3:48 Yeah, exactly.

JEREMY

3:49 You do there?

DAVID

3:50 Sure. So with the reporting piece with quick site, what we do have like straight out of the gate is a canned dashboard. We can give you guys who called boost revenue wherever continue kind of like how your management efficiencies in your pipeline, kind of the impact of that on the business and revenue perspective stuff. And then really, it's a matter of what you're trying to have visibility around within the account and one auditing the data within your account to make sure that it is possible to have visibility on that, to see if there's any kind of like cleaning up on the back end and things that need to... to be there in order for it to reflect properly and reporting. So that's our professional services team can do that type of stuff. And also, you guys can definitely build this stuff out as well with exciting, you know, all the expertise and knowledge you guys have internally. And then we also have our technical account managers who are available to help with that too. They're basically a subscription base type of resource that can be allocated to you guys on a, you know, an hourly need basis throughout the year. So, a lot of our customers who use the Tam are tapping them to do things like, you know, curating our data to make sure it's going to reflect properly in the data set to building out those reports and helping you guys make sure that they're accurate on the back end as well. That's just one of the things that they knew.

JEREMY

5:16 And that's really what we're looking for. I mean, no doubt if time permitting, we... we could take care of a lot of that stuff on our end. But given that you guys in your team is doing this on a regular basis and can probably guide us through it. Yeah, for... for the assistance will save us a ton of time in the long run.

DAVID

5:35 Yeah.

JEREMY

5:35 That's so, yeah, yeah.

DAVID

5:37 Alrighty. And there, you know, that's just like I said, one of the components that they do, they... they also help with, you know, standardizing best practices, maybe putting together an SRP documentation. So that way as you get new people coming in, they know how to engage with service trade in order for everything to be in alignment. And you can show me everybody is approaching it the second way.

JEREMY

5:56 Yeah, yeah.

DAVID

5:59 Yeah, they're a great resource to have.

JEREMY

6:00 How, how loaded up are they? I mean, is there a substantial delay to get... get their services in place?

DAVID

6:06 No, actually they're not... they're not loaded out are maxed out at this point. Either the... the way it's broken out. Like I said, it's just by like what the time needed and the tier that they're able to... to do the quick site stuff that is kind of in the middle. One currently show you how the pricing and stuff is structured for... for their time. So it's broken up into three different tiers adviser a consultant and strategic in the consultant tier is the one where they're able to be that guide for the quick site and advanced reporting stuff. Good. And that's the annual price. So for four hours per month, it's 60 to 40. Okay. And then have, you know, a lot of times that's a good like goldilocks spot to start with most of the Tam projects because for one, you got access to the quick site building.

--- Pricing ---

DAVID

7:00 But then also like if you find that you need more time consistently, you can always upgrade if you need to. Or if you get to a point where you're maybe or heavy on projects one month, they'll just teen and Bill for those additional hours. If it's just something that's like anomalous and not routine.

JEREMY

7:16 Yeah. And if we don't I mean, it's hard to envision whether we're going to have a need for ongoing consultation or support from... from the Tam. I assume it is given that we call it a project for that initial kind of assistance in getting things set up. Could that be done on a teen M, hourly basis? And then at that point, if we want, if we see the need for recurring support because I mean again four hours a month, ongoing may be sufficient. But for that initial setup piece, I'm sure that's going to be substantially more. So what are your thoughts around that?

DAVID

7:54 Yeah. So what it might be is it might be to where those four hours if it is limited on the front end, just crushing it with the... the extra build. And then that's when you got all of the like big immediate stuff taken care of and out of the way. And then those other additional supplemental value adds that they bring to the table could... could be used for the remainder of that term like the recipes and things that I mentioned are helping... helping even manage like tying in different pieces of software I don't know. Have you guys looked into, you know, adding connectivity to any other type of software within your software stack over there?

JEREMY

8:32 I mean, we're we use spectrum for on the accounting side of things. And so we've piece together some stuff initially during the launch with some stack recipes to get at the data in there. But we're working with Martha Reeves right now and a few other contractors across the country that... contract her services to build some more customized integration. Yep, sure. You're aware of that going on behind the scenes. But, yeah, helping. Yes.

DAVID

9:02 One...

JEREMY

9:04 I, from what I understand, well, I'm not involved at all on that our CFO Jeff peers has been spearheading that. And from what I've seen, they're looking to be done this coming month in February and then be ready to... to launch that. So we'll see, I mean, it's basically gonna cut out a couple of our stack recipes and just...

DAVID

9:23 Yeah.

JEREMY

9:24 Make the purchasing side of hell of a lot easier, you know, with the between parts ledger and... and spectrum because right now, yeah, we... we... we run some staff at the run, a couple of different stacks to get purchase orders in the spectrum correctly, and it's a bit of a hassle.

DAVID

9:41 Yeah.

JEREMY

9:41 So that should help that.

DAVID

9:43 Yeah. Tania was telling me about it and walking me through kind of like the approach that Martha's helping with and stuff. So it's good to hear that's coming close to being done.

JEREMY

9:52 Yeah. I mean, we'll... we'll... we'll see, I got... I got gotta see it in action before I believe it's the.

DAVID

10:00 Well, I mean, that's very smart.

JEREMY

10:03 So I can definitely work through the details on... on... this... this Tam option here. But yeah, just out of curiosity the four hours a month, I mean, if you don't use the forward in the month, is it carry over if you need extra hours? And then at the end of the day saying 48 hours a year, is it very strict with it four hours a month kind of thing?

DAVID

10:25 Yeah. So it's given the fact that their project based time, the four hours don't roll over just because of the way that they have to allocate towards all the other customers that they've got.

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JEREMY

10:34 Okay.

DAVID

10:35 Yeah, it's kinda of a needed... needed consume it. And most of the time we don't see, we see the inverse of that being an issue. A lot of times it's not affect or a matter of it being not used. It's of like we... we needed more time actually monitor. And once we have this rock star super service straight genius in our corner, we realize how many doors that opens for us to... to accomplish things.

JEREMY

10:57 Yeah. Okay. Yeah. And they can assist with, I mean, again, anything from the reporting side to getting clients setup and on our site for access to the customer portal, things like that because that is something we're still, I haven't... haven't even approach it in that.



DAVID

11:16 Management. They'll... they'll even like set it up for customers. If... if they need it set up. Even on the website, they can do bulk data management and things that maybe need some help on the back end from like a data infrastructure point of view. Yeah. I mean, with companies that are growing and acquiring in getting your offices are opening up, they, they're really beneficial and helping getting that new office stood up in service trade. Now here's your entire new customer list. It's almost like you have a project manager like you did in your initial implementation and side by side with you?

JEREMY

11:47 No, that's... that's good to know. And I, it's been a while since at revisiting our contract. I think we're is an enterprise level. Is that kind of the top... top tier?

DAVID

11:56 Yeah. That's where did you get that data set yep?

JEREMY

12:00 Yeah. Is there any sort of, so there isn't any sort of technical support included in that? Not... not at this level?

DAVID

12:08 Yeah. You guys do, I mean, you have access of course, to our support team 24 seven, just base where you are.

JEREMY

12:15 But not to this degree, not.

DAVID

12:17 Yeah. Yeah. That's a little bit heavier... heavier handed type of approach for sure. Yeah. So yeah, that eventually, well, you said quick site mind, it's not going to be the overall BI.

JEREMY

12:32 Yeah... profits.

DAVID

12:36 Profits.

JEREMY

12:37 Yeah, PR, PH ix... I haven't really even having seen it yet, but couple... couple of my peers, partners and... and Jeff and wild by it and fluid, but cool. It's... it's capability. So, you know, how much different it is then a quick site or Power BI, or any of those I don't really know, but it's gonna do wonders for them on the

construction side and sure for what we need on the service side could easily handle it. I don't... I don't want to wait because we want right now, we're manually tweak in CSV files and excel files and extracting some data and trying to get it into a report form that's yeah, it's just not... not ideal. So I want to do something in the meantime and who knows it could end up being long term for us not have to move the prospects. It's just nice to be able to standardize as a company.

DAVID

13:33 Yeah. And this will... this will provide you a little bit more strategic agility to, in a month.

JEREMY

13:39 For sure. So next steps on that would be, I mean essentially, we need to get you our wish list of, hey, this is the, these are the reports. This is the... the data we're looking to have at our fingertips and get our accounts setup with... with Amazon. And then from there in list one of your technical guys to kind of work with us. And, okay.

DAVID

14:03 Yeah, absolutely. And I'll check on the... the large for like their timeframe on projects for new people hopping onto the Tam.

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DAVID

14:12 I think typically it's like two weeks at the moment... because we just pass the fifteenth. So the potential start date would probably be like a February one.

JEREMY

14:24 So, what is their hourly rate? And the can I do with that price is divided by 48? Is that hourly? How does that?

DAVID

14:31 It's actually price for the transcription? It's actually price better than the professional services. We... we wanted it to be more of a like a financial relief for people who needed that type of consistent support from us. And I think that the any kind of like data advanced reporting rate as at our Dev, higher tier, which might be like 175 or something an hour or... one 190. I can't remember. What... what does that now? I think.

JEREMY

14:58 Just hopping in that range. Okay?

DAVID

15:00 Yeah. Alright. Yeah.

JEREMY

15:02 But budgeted a couple of 100 bucks an hour. That would give me an idea of what it would be from what are you, from your past experience? I mean, for that initial setup, let's say there's... 2015 to 20 things that we're looking to... to track and the data is readily available?

DAVID

15:20 And consistent?

JEREMY

15:22 Yeah. I mean, do you see that being again, assuming we're willing to put in some time and effort on our end, we just need some guidance getting... getting things set up and see and have it talks and jobs. I mean, is that a couple of days, he hasn't like a 16 to 20 our effort kind of thing?

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DAVID

15:39 It really depends, you know, like how big is the list, how detailed and specific or these visualizations gonna be? If you're going to require maybe the combination of a couple of different data sets itself? Like are you just gonna need to pull in that data from the jobs and data from the invoices data set together? Okay? Since right now and the data set, those are standalone buckets. So there might be some instances where you need to combined that those tables. Okay? Just depends on the complexity really... you know, and... and I've seen it. I've never seen that be like a simple like here's your stuff. We gotta set up and good to go like, yeah, it's like here's our first pass at it here's, our... our draft making sure that we've got visibility on what you're trying to have your finger on the pulse of looking through that. It's an accurate representation of the data so that when you guys are going to be informed when you're making decisions for the business. But when you look at that correctly?

JEREMY

16:36 Sure. Okay. Alright. Cool. That helps.

DAVID

16:41 Yeah. So, yeah.

JEREMY

16:43 Got a clear understanding on that then. Yeah, I guess moving on to the other topic or topics, I guess what's going on with... with you guys? And.

DAVID

16:56 Yeah.

JEREMY

16:57 You know, I haven't really had much interface with you at all. And then six months probably since we had our recurring meetings with Patrick and the team. So.

DAVID

17:09 Yeah. Yeah. So we've... we've got a lot of excitement around, you know, our... our, for our first round of funding this past couple of months, not sure, but like our... our lightweight.

JEREMY

17:21 Big round.

DAVID

17:22 Yeah.

JEREMY

17:24 Hello?

DAVID

17:26 And, you know, when that will come a lot of big things from the depth side. You know, I think we're gonna try to accelerate the way in which we can bring things to market as opposed to like the way that we used to have to, you know... really go through that slow process of minimum value product to make sure that like we're taking the correct steps, but I think... after we get over this project management implementation, like I don't know if you're aware of that, but we're adding a lot.

JEREMY

17:57 Was actually one of the main things I wanted to ask, where does that stand? What... what all does that include? Because that is one of the biggest... areas it's lacking in service trade for sure.

DAVID

18:08 Well, I won't be... won't be for long. Yeah, actually Reinhardt, our product manager, I always good. When I'm talking to talk about this, I always get them confused because it's our product manager talking about project management and service trade. He is very excited at the pace in what you're gonna be able to release this stuff. So, we've already done the groundwork for the data structure on jobs. And now you can associate, you know, items.

JEREMY

18:39 Your services.

DAVID

18:40 Exactly. So that was kind of the first layer of foundational change that we needed to make in order to pull through that... that data structure to more of a... a time based view of what's going on the project, right? Okay. So all of these long, by

the way, it used to be just long running appointments for this long term thing and it's just everything gets thrown into one bucket. Yeah. So now it's going to be able to be broken out in a way where you can see certain phases or views of that time throughout the project, what was associated without and it's not only the hope is not for that to be just internally focused for you guys but also customer facing as well. So that way if you send out a service link to a customer, you'll be able to show here's what that... that window of time look like for what was done on that project. Okay? And I think next to come up is... budgeting, I think is going to be the next thing to be released in the next couple of months. Like how do you budget... and maintain any kind of like change orders and stuff throughout that entire project?

JEREMY

19:45 Yeah.

DAVID

19:45 As opposed to having to just re quote or something like that right now? Okay? After?

JEREMY

19:49 Yeah. Okay. No, that's good. So, I figured that was the first step, you know, it seemed like a logical want to be able to break out things by service. Yep. I assume a component of that will be pricing by service as well in the sense that if you have one quote to a client, you can have multiple services within that quote, they have the ability to then approve only one or two services rather than the full quote is that I assume it will kinda lend itself to that.

DAVID

20:20 Yeah. So you'll definitely be able to, they're quoting structural definitely changed a little bit. I haven't seen the full blown version of what it's going to land on that. Yet. One thing we could do and what we have been doing, Jeremy is having Reinhard sit down with our customers. Yup, talk through the vision of what this is gonna be because, you know, we're not only we're not producing this in a vacuum. We're wanting to like as we build it, have feedback and get, you know, your take on where we're going with it. So if you want, we could set some time up to where he could meet with us and walk you through exactly what's on the horizon in a more detailed fashion because, you know, since he's got the keys to the kingdom over there, he can open up the door and show the sausage making in the background. Yeah, right.

JEREMY

21:06 Yeah, that's definitely something I may take you up on. We've been getting by but definitely been telling a lot of our project managers that, hey, this is... this is in the works. It's coming. You know, it's... it's something that they're heavily focused on improving.

DAVID

21:19 Anytime, run our talks about it. He's always positioning it as like this is something in the long term. This is something that we're currently actively working

on and it just seemed a released in the coming months. So it's not like a... a long term change that you'll see it's gonna be pretty quick. Like I said, we're... we're excited about our... our rate which we can really stuff to market at this point. Okay?

JEREMY

21:43 I'm kinda curious who you guys seen as your direct competition right now? And... and.

DAVID

21:50 I think it would really.

JEREMY

21:51 Just...

DAVID

21:51 Logging in the industry. To be honest, there's... there's everybody else?

JEREMY

21:56 And to expand significantly and are starting to on the mechanical area and H back, yeah, marking up?

DAVID

22:04 Your tree these days, Jeremy?

JEREMY

22:05 Yeah, yeah.

DAVID

22:06 It was barking up your tree these days, Jeremy.

JEREMY

22:09 No. So I don't know if, you know, we're part of synergy solutions group. It's a group of contractors nationwide, but flavor of us... and we're essentially a peer group. Yeah. So there's been some discussion about different operating systems and I've actually been pushing and encouraging folks to look at service trade. And I've talked to Laura ability about, you know, if you guys want an opportunity to get in front of the group at some point to let me know. And I think Laura had some interfacing with them in the past and I don't know if they ever really got together but I, one of the... there was a message board there. There's a message board with peers and send out noticed everybody, hey anyone here about this or know anything about this and one of the contracts that brought up BuildOps. And... but I also tried to in about service trade. And so he ended up call, I mean, we talked it through because he met with he, they're added, let's say newness Pennsylvania. They're up in Pennsylvania with rough.

DAVID

23:17 Okay. Yeah.

JEREMY

23:19 And they met with the sales team and Billy and kind of the... the dog and pony show... and he wanted my input on service trade and my thoughts around that. The other company your product they're looking at was BuildOps and I wasn't familiar with it. I hadn't really heard of it. Yeah. But he said that he saw... saw service trade initially met with him was wow and forward and was about to, you know, move forward with it was recommending it to the partners and they said, well, it's you should see BuildOps. We met with this group and it's equally as impressive. And so then he saw the BuildOps presentation and he said he was more impressed with what they were bringing into the market, their capabilities. And so I took a look at it. I guess I don't know Siemens is fully acquired them or is just heavily invested in them. But anyway, I, in looking at their site and just in... in what he was explaining to me, they definitely have some advantages on the project management side. So I wasn't sure if that's something you guys are looking at, comparing what your product delivers versus what there's... there's is geared just to the H back industry. I mean, it's... it's meant to be for mechanic mechanical contractors.

DAVID

24:28 And...

JEREMY

24:29 Really kind of hone in on what I felt that our service rates weaknesses and... and where the products lacking. So if it's not already on your radar, and I'd be shocked if it wasn't on... on Billy's radar, right? Arts, you know, as far as the product will look at that, I couldn't commit and they... they sign a BuildOps rooter opted, right? You know, I couldn't stay or otherwise, I said honestly, man, from whatever everything you're telling me it sounds like BuildOps may be the better way to go and say they're young. They're... they're only, I think been on market for a couple of years, two, three years. So there's a risk involved there, right? What Siemens going to do with the product? You know, are they gonna do like they do with their other? Should make it really miserable for anyone that's working with them... hard to say. So there's some risk involved. But yeah, I, I'm not saying I wouldn't go differently. It had had I've been signing on the dotted line now kind of thing versus a year ago, hard to say, but it just, I was curious what your thoughts were.

DAVID

25:28 Hello. Yeah. Yeah. So we definitely we solve the need out there at the marketplace for the project management stuff, you know, the extension of how that overlaps in the service. And sometimes, you know, it's not going to be like a humongous two year long job or something that is outside of the year. So really want to make sure that we provide that space for the management of projects to be a lot more seamless and the data to be way more accessible and throughout that project, allowing you guys to pivot and analyze your performance against a certain budget and the way in which you build towards that budget as well. So it's definitely, it's our highest priority and it should be done and out there ready to go. I would hope I'm pretty soon and Reinhardt when we meet can give us more of an accurate depiction of what that window looks like.

JEREMY

26:20 Okay, good. That's... that's good.

DAVID

26:23 What, from what I've seen and the meetings that have been on with him with other customers, everybody super Jazz and excited about it on the mechanical space to the fire industry. Everybody's like, wow, I can see how this is really gonna change, you know, in relieving a lot of the things that we've been like you said, just getting by with.

JEREMY

26:41 Yeah. Okay. Cool. What's the latest on parts ledger?

DAVID

26:47 Yeah. Billy would probably be the best person to talk to you about that. Have to be honest. I mean, he's the one really managing that entire thing. I know that it's a huge focus for him and that team and we should have some kinds of information soon about, I know it's been, it was like his number one project at the end of last year. So I'm definitely if you want to, maybe since Lawrence is now, you know, she's the director of the west. She might have a closer here closer tied to Bill easier. So you might want to ping her though if you want some... some more accurate insight around that because I don't wanna say anything that's like not true and... put the cart before the horse. So, yeah, I think I'll... I'll delegate that to the... the.

JEREMY

27:40 Yes... I'll... I'll check in with those... those two and see where they're at their, yeah, when we met with Billy, guess late summer, early fall. Yeah, he acknowledged that... that was kind of the one of the biggest pain points and that you guys have just switched partners on... on that side of things and we're going to be investing in improving that and making that a little bit more user friendly. So it's well, welcome that we've... we've found leaps and bounds internally. We went to the point. We're ready to drop it because it's just such a pain, yes. But... we... we stuck through it and our... our purchasing team is getting by now.

DAVID

28:20 Yeah. Exactly. I really appreciate the effort and everything that your team has put into that, you know, just even when I've met with them to walkthrough, you know... you know, just certain specific... specific walkthrough things in service trade, you know, your teams eagerness to understand and execute has really been noticeable. So, I think it's awesome. The team that you guys have put together over there?

JEREMY

28:40 Yep, text and I appreciate that. Yeah... I don't know if there's really much else that I needed to talk through on my end. I do want to probably start interfacing with you more often. Yeah. Yeah, I see obviously busy and... limited availability on short notice. So I, it may be worth getting a recurring meeting on the calendar.



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JEREMY

29:06 Yeah, to... to kinda talk things through and... monthly month flies by now days. So I don't know if we want to do a BI monthly meeting, get that on the calendar.

DAVID

29:16 Yeah, that sounds good to me.

JEREMY

29:18 Okay. Goodbye.

DAVID

29:19 You definitely do that. So do our... our next one in March sometime?

JEREMY

29:23 Yeah, I think that would be worthwhile...

DAVID

29:25 Cool. Let's go ahead and set it up right now. So it's already there and ready to go and not have to worry about it. Let's see here. Let's see Wednesdays and Thursdays really do work best for me. I don't know if this time of day is good at the beginning of your day. So you can just knock it out and then focus on what else you got to focus on?

JEREMY

29:44 Yeah, for sure. Yeah, no, definitely. I do like early morning meetings.

DAVID

29:53 Okay. And do like the seventeenth at seven 30... pacific in March?

JEREMY

30:03 Yeah. Yeah. Is your... your 10 AM taken? We could even bump it a half hour earlier?

DAVID

30:10 That's when my, that's one lead our team meeting. Okay? Yeah.

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JEREMY

30:14 Sounds good. We'll do a seven 30.

DAVID

30:25 Yeah, I'm actually... I'm actually stepped into a new role. I'm... I'm now the... the team lead of account management. So, you know, less accounts under me. So this type of thing is much more in the vein of what I want to be doing. So recurring touch basis and just making sure that the conversation is continuing to go in and edit more consistent pace is definitely what I want as well. And I'm happy to finally have that ability.

JEREMY

30:52 Yeah. Well, congrats on the change in role there. That sounds like a good before it.

DAVID

30:58 Yeah. Yeah. I, you know, I started account management at service trade. I was the first one. So like that, there was no path. You know, I was, it was fun to get able to like sort out how we approach this type of thing with our existing customers and with skipped our VP on board. Now, it's nice to have his support and expertise and insight in... in this space. And I'm excited to be able to... to training and help the... the rest of our team to get.

JEREMY

31:27 How many account managers do you guys have an?

DAVID

31:29 Well, now we've got let's see Dorothy, me three six eight. Okay. Nice. Yeah. Yeah, we've kind of broken it out to where like there's some corporate tier account managers like myself that handle different territories. And then there's some... developmental tier account managers is what we call. And then a new role that we've broken out is just for everybody that's you know, the smaller shops that needle or, you know, not as much a specific project focused attention... that's where they handle. Yeah. Yeah. Yeah, that's good.

JEREMY

32:14 You guys grow.

DAVID

32:15 Yeah.

JEREMY

32:16 Okay. Great. Year. Couple of years or so.

DAVID

32:19 Yeah. Yeah. And like Billy always sets, you know, the... the reward for hard work is more hard work. So.

JEREMY

32:27 It doesn't let up but the reward for the hard work to, tends to get better, which is nice.

DAVID

32:32 Exactly. Good point. Yeah. There you go. That's... that's the good... the good silver lining, you know, that for sure. Yeah, cool. Well, I'm I've got that on the calendar for that date. Let me go ahead and throw you on there. So we've got it lined up.

DAVID

32:51 Okay.

DAVID

32:57 Trying to think there was one.

JEREMY

32:59 Question that just came up yesterday. I was gonna bounce up here.

JEREMY

33:09 Was it... you may or may not have an answer to this? So... Barbara Eldridge in our office was working, I think with one of your general support folks on... on trying to get some info on it. So, what we've noticed over the months with our HR pass, do collections when we're going in and finding out why people haven't paid there's a large percentage of those that haven't been paid. When we go back and look, they didn't actually even the invoice. So, it's like whoever we sent it to is the wrong contact or they went to their spam, and they never got it, but doesn't look like there's a, an easy way to identify those that haven't been huge shortage going. Looking at the invoice and go into history. There's not a reporting function to... say. I mean, even if you export to a CSV file that there's not a column and know that invoice has that viewed, yes or no or something like that from what we could see.

DAVID

34:17 Hey, take a look real quick and see what there's the statuses are. Yeah, there's not like a send you.

JEREMY

34:25 Just shows and history. Yeah. So you... you will know if it's sent that's easy to see. But whether or not the person that we sent it to us, even viewed it... that there's no way of identifying that short going into the invoice and looking at the history, which, but RSOP is gonna be what we're going to assign that to somebody because obviously, if they're not getting the invoicing that seeing it, it's not going to get paid but the problem?

DAVID

34:51 Right.

JEREMY

34:51 Hello?

DAVID

34:52 Yeah, I'm here.

JEREMY

34:53 If there's if that's an enhancement that's fairly easy to implement. If there's a way to pull that in even if it's not within the service trade data that is presented, but if it's something as an export to CSV file where it's... it's looking at history because, you know, how you... how you can show all of the tags on the job, all the comments on the job as a column. Can you also so history?

DAVID

35:16 Yeah.

JEREMY

35:16 Granted, that would get excessive.

DAVID

35:19 Yeah. Yeah. The... the long term history will be nuts. But if... if, you know, on service links, there's the whole aspect of is the service link sent and viewed. You can actually like look that type of stuff up. So that wouldn't be something that I would like to see. You know, with that IP tracking that we've got a test that way or not have the same exact association with.

JEREMY

35:39 The invoice and invoice history is not going to be that expensive. It's the job history where you're going to have. Yeah, yeah, crazy amounts. So even if you could just pull in the invoice history as a column, yeah, I probably wouldn't be that access it. So, yeah, if you could dig into that, save us and some headache for sure.

DAVID

36:00 Yeah, because if... if we had that way of sorting the search on the invoices page by that sent but not viewed, then, yeah. Yeah. Whenever you run that list, then you could like almost bulk resend you the invoice if you wanted to.

JEREMY

36:15 And that is an option, right? I mean, you can do the bulk resend and we saw that, but we don't want to resend it to folks that have already seen it and it's just looking at that point. So, yeah, being able to have like you said a pull down of sent but not yet viewed that's really, that... that would be the ideal solution.

DAVID

36:33 Yeah. Yeah, absolutely. Let me just see real quick here. Make sure, yeah, just needs review. It's just go. It's almost the only status is associated with invoices right now. We're just kind of like the invoicing workflow. Like, okay, draft failed sent.

JEREMY

36:51 Yeah. Yeah. Once it's out, it's kind of like... lost in the, yeah in the wild there, yep.

DAVID

37:01 Okay. Cool. Well, I'll add that as a feature request and get Reinhardt and Shawn's take on that because it makes 100 percent logical sense to me.

JEREMY

37:10 Yep. Okay. Yep. Cool. Thanks may not be easy to implement. Yeah, always seems like it on the surface but not always the case.

DAVID

37:19 Yeah. Alright. Well, between now and March, you know, with the reporting side of things, we did get the... data warehouse setup for you guys. Let me just double check. I wanna make sure that you've got credentials accessible to you because I think I sent them to Jeff at one point in time if you.

JEREMY

37:41 Yeah. If you do, can you send that to me? Because I made that clear on what the data warehouses or with that... that really means.

DAVID

37:48 So it's... it's basically I'm a spin up Redshift data set of all of your information for you guys to basically I into your BI tool. I guess what, what's pointing, what the BI tools pointing to?

JEREMY

38:00 Hello? Alright.

DAVID

38:01 Yeah. Yeah. Yeah. You do have credentials. So we've already set up your dataset so I can give you the user name, schemer and password for that. Perfect. You got it available. And I'll also pass along the setup guide to tied to the quick site. There's an article that talks talk to you through how to set it up.

JEREMY

38:20 Huge. Yes, please. That would be a good... good starting point for sure.

DAVID

38:24 Right. And then I guess just take a look at the Tam information and do a deep dive in that. Whenever you click into each one of those tiers, there's like a button at the bottom with services provided or whatever that's where it will show you that matrix of what they can do it, each one of those different tiers.

JEREMY

38:39 Cool. Okay.

DAVID

38:41 Yeah. Alright. I'll just pass at all along. So do the payment for the quick site support article... and then a quick site user name stuff. I've dataset using stuff. Okay... cool. And the only thing that really stood out to me, Jeremy, from the account now through, you know, data that I pulled together was... let's see... the utilization of service links and work. Acknowledgements. Are you guys not really using that much right now?

DAVID

39:25 Sending those out just looks like it's just low volume.

JEREMY

39:29 Yeah, it's... it's really not... it comes through. So we always have our workflow is when we're completing the job, the account managers setting up the service link to be to share what we want to share with the client so that when we send the invoice out to the client and they do the service link at that point yet, or have the ability to view the service, like at that point, the info is there if the customer, but we don't we're not sending it separately to the clients. So a few require it and it's set by the technicians, you know, when they... when they finish their... their visit, but it's a very... very small percentage like we see.

DAVID

40:09 Okay... cool. So basically making sure the jobs in good shape and the... the data is being shared via service link is what you want to have visible credit customer.

JEREMY

40:19 Right then they complete the job then accounting process as it submits the invoice. And at that point, that service link is available to the clients and... and it's set up. So... are you... are you able to see the percentage of? So this is just if the service link to set... set separately is what you're seeing here. It's not if it's part of the invoice.

DAVID

40:42 Yeah. For the same two part right here, this, the blue column is the manually sent version. But as far as viewed right now and repairs 12 percent of your information is being viewed on a, in the past six months.

JEREMY

40:57 Externally view that's okay. Yep. And that would include anyone viewing it through the invoice links though. Okay. Yeah.

DAVID

41:10 Yeah. So pretty, yeah might be, you know, worth just, you know, a marketing thing to send out the customers just to say, hey, did you know that we've got a vast amount of information readily available to you every time we send out that invoice notice. Yeah... just... just put that extra layer on there because well, we've we have found is really having that available at the time of collecting is a great way to reinforce the why behind this invoice. You know, I get to see God here's everything they did for me, but totally see the value. Now. I'm gonna go ahead and pay their.

JEREMY

41:44 It's a good point. Yeah, I've had a handful of clients reach out and say, you know, can you provide some more info on what this was? I simply click on the... the link to get a little bit deeper into it because all the details there. No, I didn't even catch that. I just looked at the PDF copy of it. Well, it's not going to get you far. So... yeah, that's a good point. We didn't do very good external marketing when we launched as far as the, how twos?

DAVID

42:08 Yeah. Yeah. So just, you know, customer engagement a little bit. There would go a long way to help not just the customer but you guys do from a marketing standpoint.

JEREMY

42:18 Well, that's where we're open to getting the portal setup for... for clients and getting that launched and ready to go is gonna obviously make a huge difference too. It's kind of, yeah, they'll sell to them. Was that you're gonna have all this data at your fingertips whatever you need it. Yeah. So we'll get rolling on that.

DAVID

42:37 Cool. Yeah, that was the only big kinds of things stood out to me. Everything else like that goes wrong, right? Like your quote management efficiency management collection of all that stuff was great.

JEREMY

42:47 Definitely need to get better on the deficiency management side and get quotes out generated from deficiencies. And that's been a heavy focus for us to.

DAVID

42:55 Yeah, actually doing a great job collecting the... the volume that I saw like the count over the past six. Yeah.

JEREMY

43:00 You guys write up a lot that's for sure.

DAVID

43:02 Yeah, I think it was a two, almost 2,500 deficiencies in the past six months. So that's awesome.

JEREMY

43:10 And we had 25 job, 2,500 jobs that stem from those, that would be even better.

DAVID

43:14 Yeah. Yeah. It looks like maybe about a 14, 15 percent of those deficiencies have a completed repair job.

JEREMY

43:22 But definitely want to get that up, so.

DAVID

43:26 Cool.

JEREMY

43:27 Thanks for the time and.

DAVID

43:30 Yeah, you're welcome. I'll send along that information for you. I'll probably also export just the data that I pulled together. So you've got it for your own reference to send it as a PDF. So you can see it on.

JEREMY

43:40 Yeah.

DAVID

43:40 Great. Cool. Alright, Jeremy.

JEREMY

43:42 I take care and I'll talk to you soon. Thanks.

DAVID

43:45 Bye.

*The End*