Followup ServiceTrade Demo with Bee Clean Specialties, LLC

Daniel Geary with Bee Clean Specialties, LLC
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Participants

ServiceTrade

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General Manager

Scott McAbery
Position In Finance, Information Technology, Customer Service

Other

Topics

Transcript

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MICHAEL

0:00 Hey, Bruce. How you doing?

DANIEL

0:02 Good, good. I'm... waiting for the rest of them to join off sites.

MICHAEL

0:10 Yeah.

DANIEL

0:10 It looks like we've got everybody joining now. So I'm just admitting everybody in.

MICHAEL

0:18 Bruce, you said you're off site today?

MICHAEL

0:25 Are you out in the heat?

DANIEL

0:27 I'm in Detroit?

MICHAEL

0:29 You're in Detroit? Are they getting the same heat? We are... it's like 100 here.

DANIEL

0:45 Hey, Scott, can you guys hear us?

DANIEL

0:51 Yeah.

MICHAEL

0:51 We can do, I... appreciate...

DANIEL

0:58 Everybody joining. Do we have everybody Scott?

SCOTT

1:02 Yeah, everybody, I can make a mark over here.

DANIEL

1:05 Mark. Awesome. So I put a little bit of an agenda together for us today. Minimize my star myself here, put an agenda today together so that way we can kinda finalize everything that we've been reviewing.

--- Tech time tracking ---

DANIEL

1:25 Think the first thing that we'll discuss today would be finalized Northboundary. Any questions that we have need to be answered? We'll certainly do that for you guys. We'll follow that with time card process. So we have a time card tool that allows you guys to track technician hours that are pulled right off the jobs so that way they can go in at the end of the week, review their time card, make sure everything is sync up and then submit that to the office for approval.

--- Pricing ---

DANIEL

1:50 The last two things that we'll talk about that Scott and I spoke about this week was helper licenses, right? What is the advantage of a helper license service trade? How do customers utilize that versus a full-fledged license? And then last, but not least we'll cover onboarding and pricing, right?

--- Purchase decision ---

DANIEL

2:07 What does it look like to onboard with service trade? And then, you know, we'll look at the pricing based on whether we think Northboundary and service trade or are a good fit together service trade so low, you know, that's something that I wanna definitely answer for you guys, and go from there, sound good?

--- Purchase decision ends ---

DANIEL

2:28 So, as it relates to Northboundary, you know, Michael and I did some talking over the last week and a half about functionality and where we felt Northboundary fit with the clean specialties. So, first and foremost, you know, our CRM is going to give you all the functionality that you guys have desired minus a few things. I think the big one was the e-mail option. So in Northboundary, there's no way to communicate with the customer via e-mail. You'd have to go into your own e-mail domain, whether it's Gmail outlook and communicate that way. The second thing that, I finalized today is like a Zoom info update. So there's no way to integrate ZoomInfo with Northboundary. But what you can do is export all of your contacts through a CSV file that's what our customers do today. Instead of hitting that nice little widget button, you would just have to import that via CSV. So, I wanted your thoughts Scott you guys really seemed, to like Northboundary when I spoke with you earlier this week and I wanted to see, you know, what questions, what maybe concerns did you have? And why do you feel like Northboundary, maybe a more optimal option then than Salesforce?

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

SCOTT

3:46 Well, I like the quoting functionality of it, but the e-mail thing is gonna be a bit of a thing to overcome.

DANIEL

3:55 So...

SCOTT

3:55 There's no way of attaching sent emails to it either than like if you send them from Gmail... like right now with Salesforce, we just send, the e-mail thing, pops up and click a button and attaches it to the account. Yeah.

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

MICHAEL

4:13 Yeah. There's not anything equivalent to like the Salesforce capabilities on that because again, you know, Salesforce is a dedicated CRM and that's what it's focused on. Whereas ours is what I would consider, a light CRM with those proposal building tools. So, you're not gonna get that e-mail communication I was looking into, you know, what the options there are that you're really not going to get that level of e-mail you know, automatic attaching type stuff like you would do with Salesforce that being said, you know, can you copy an e-mail over, you know, manually paste the e-mail body into an activity history? Yeah. And so you have that, but that's a much more manual process. It's it's you know, it's not automatic. You're having to manually go, hey here, I'm gonna copy the body of, this e-mail and paste it in here as an activity that I logged... so that, you know, that is going to be a deficit relative to what you're doing today. And the reason, you know, Danny and I have been talking about Northboundary for you guys is because while Northboundary is cool, you're using some capabilities in Salesforce that Northboundary can't necessarily replicate. And then even on the proposal side, while the proposal tool is very robust, some of the benefits of that proposal tool are going to be less relevant for you because you're using fixed rate pricing, right? So that calculating based on tasking and things like that aren't gonna be as beneficial because you're doing a fixed rate based on the number of sales, does that make sense Scott?

SCOTT

5:44 Yeah.

MICHAEL

5:45 So, so we just wanted to, you know, really talk through Northboundary because as Danny and I talked about it, could Northboundary be very helpful to you guys? Absolutely? We think it could.

DANIEL

5:57 We think it's gonna be after, you know, once that proposal has been generated. So I met with my Northboundary team today where people are finding... that they're leveraging the software is now that proposal is created. Now, there's a much better way to track that, get that proposal to your customer.

--- *Recurring maintenance* ---

DANIEL

6:15 But then once that agreement is signed, now you're gonna take all that data that you've recorded and push it right into service trade. And what that will do for you is it will create the customer. It will automatically create the asset. It will create the follow up task, whatever can contract or agreement you've created as far as frequency of going out there, all those items automatically create an account for you.

--- *Customer engagement* ---

DANIEL

6:36 So you're not then going into service rate, entering that in. So while there may be a little bit of double data entry on the front end, you know, the back end is where customers are seeing that. And, and one thing I do want to maybe object to is, even though you guys aren't maybe tracking the time and material necessarily like our customers at the end of the day, if you are tracking, that gives you better insight to revenue, right?

--- *Quote templates* ---

DANIEL

7:00 Like how are we controlling our cost? How are we performing overall as you guys are growing? So I just wanna make sure that I'm setting the right precedent for you guys. Because when you guys on board, what you'll have to do is create your assets and then you should be able from there, it will all about be re tuning and refiguring, we can get your templates into Northboundary and build out your different templates, but you will be required to enter your assets from scratch.

--- *Quote templates ends* ---

MICHAEL

7:29 Clarify that, Danny. We're referring to the asset types, right? So you're various air cleaners that you work with that aren't already in here as stock asset types, we'd want to create, you know, here's a two cell one here's. A for cell one here's. That big 18 cell one we looked at, right? You'll want to create those different asset types, and, you know, the logic associated with them so that they're in here. So I think what Danny is saying and, I tend to agree with it is we think Northboundary could be very beneficial to you, but there are trade offs, right? Whether you know, where you'd lose some things from Salesforce but gain other advantages and we just wanna make sure we're transparent about those.

DANIEL

8:07 Yep.

SCOTT

8:11 Okay. The Northboundary, I, the part I liked about it was more for the quoting of the installed jobs, I.

MICHAEL

8:21 The projects?

SCOTT

8:22 Yeah, the projects then the service, but...

--- *Type of work* ---

MICHAEL

8:27 Okay. And, and one thing that stood out to me, Scott that I just made note of when I was on site with you guys was that it sounded like even the quoting within service trade was a pretty significant step up from the current quoting process. So, you know, we've got a variety of options there. But, yeah, and Northboundary as the maintenance proposals or, the, you know, installed projects, things like that?

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

DANIEL

8:49 So... is there anything specific that you guys wanted to re, examine in Northboundary? Do you need to pull that up and re, review any workflows or segments of the platform?

SCOTT

9:13 Yeah, I mean, we kinda had a brief overview as trying to remember what all we did go on but.

SCOTT

9:23 I don't know. Was there a?

SCOTT

9:31 Say.

DANIEL

9:44 Michael, is there anything you ran that meeting was, I felt like you were pretty thorough with that, you know, was there anything that you excluded or feel like we could add there or?

MICHAEL

9:54 We, we only touch lightly in Northboundary. We pivoted more to do a deeper dive on service trade side of things. But I think the key thing is, you know, where Northboundary, you know, the key takeaways on Northboundary is as far as the CRM, you're gonna have that ability to log activity, set, upcoming tasks, track your opportunities, see how they're progressing. But then where it really stands out is stronger than other options on the market.

--- *Quote templates* ---

MICHAEL

10:20 Are both the maintenance proposal and project proposal, building tools where you could, you know, have for example, on an install project, you know, have parts kits. Hey, so when I know when I'm installing one of these, I need this material, this labor, this equipment, whatever it might be and be able to build those more quickly, standardize what they look like, turn them into a more formal proposal with cover letters and all the supplemental material, and have that standardized across your offices and allow you to do those very quickly... because that's again, that's the strength of Northboundary is being able to build proposals more efficiently and more... consistently, right?

--- *Quote templates ends* ---

MICHAEL

11:07 So that no matter who's doing it, you've got a nice standardized approach to those and pricing for those, and presentation for those. So, I think those are the key takeaways, Danny, unless you disagree.

DANIEL

11:20 No, no.

MICHAEL

11:22 And again, I'm glad, to take time and walk you through any specific part of that as needed. So.

SCOTT

11:29 Right.

DANIEL

11:29 Did you want to open that Scot or do you think we should focus on the service rate piece you're talking about?

SCOTT

11:37 Yeah. I did have a couple of servers trade questions that kinda, you've covered it on the major negative, I guess on the.

--- *Recurring maintenance* ---

MICHAEL

11:48 Yeah.

SCOTT

11:48 Emails not being attached. So we'll have to decide what we wanna do about that. Okay? But one question that did come up on service trade was how are like multiple day jobs handled like as far as assets per day and whatever?

DANIEL

12:10 Yeah. Sure. So on a service trade job... our customers work on multiple assets on a PM. So let me go ahead and build one out for to show you what that looks like. So let's say we've got a PM, do service trade is gonna typically generate this work order for you when you're pulling your reports, but I'm just gonna put a couple of units on here.

--- *Recurring maintenance ends* ---

DANIEL

12:33 Okay? So we're gonna schedule this job. This job is a multi day job. We're gonna say it's gonna take us two days to do... this is a PM... and we're going to go ahead and get that scheduled.

DANIEL

12:53 So now whenever your technicians open up their work order, they're gonna see that this is a two day long job and there's multiple assets that need to be worked on.

--- *Assets* ---

DANIEL

13:02 Okay. One, two three. Now maybe you've got multiple text on a job performing these services. Not an issue. But as you can see, we've got the 20 eighth and the 20 ninth filled out when your technicians are working on equipment, service trade is gonna say, Danny, which piece of equipment are you inspecting? And I'm gonna click on rooftop unit number one. And then when I go to finish my job, I may have not completed these two pieces of equipment. So ServiceTrade is gonna say, hey, you still have these two open services due for tomorrow. So ServiceTrade is gonna let the office and technician know based on which units a technician notified that he worked on, and then which units were left to be come completed for the following day down below, you'll be able to see all the different time and material that were put into these units if you'd like to track it that way. But this is also going to indicate to show you, hey, this is what's left. And this is what's been worked on. So this is where we do a really good job of tracking multiple assets on a single job through multiple days and then allowing technicians as we're working that equipment to notify what equipment they worked on, what work was done, what parts were installed, so that when we go back the following day, I can see the only two open options where this rooftop unit and our nor lake refrigeration unit.

--- Recurring maintenance ---

DANIEL

14:24 The good thing about this is you've got one work order to work off. There's. Now two separate work orders for two different days for two different technicians. It's all one job, multiple technicians, multiple services, multiple days and one report for you guys to pull off of the invoice.

--- Recurring maintenance ends ---

SCOTT

14:44 Okay. I guess where I'm trying to figure out maybe we'll just have to manually sort it out. But so a lot of the reasons our jobs are two days is say they might have 100 calls to between the two days and we can only do 50 in a truck or whatever, but they might be... day one might be 30 SG calls and 20 SH cells and they do might be all G calls, just trying to get away.

--- Assets ---

SCOTT

15:18 Tech can figure out what it needs to bring but for individual day but...

DANIEL

15:24 Yeah, that's pretty simple, right? So when the technicians are working on, let's just say there's one unit here, but that unit has 100 cells well down below here in the service line, you're going to be able to see how many calls were added, how many are still left to be added? So when the technician clicks on that job, you're gonna say, Daniel, are you done with today's? Visit and say, no, I'm not, why aren't you done? We still have 40 cells remaining to be installed. Now, you'll have like you said, you may have a BC level cells. You'll have each one of those cells and packages of different line items. So that way, whatever's been depleted on day one, you have a remaining balance of 40 cells that need to be... swamped on that one unit.

MICHAEL

16:11 So, do you need to expand on that if it's okay if you scroll up a little bit? Yeah. So I actually just logged into this job as a tech because you added me to it and Scott, I don't know if you could see it but you'll notice that first asset that needed servicing has been not only to the appointment finish, but I service that one asset right there.

--- Assets ends ---

MICHAEL

16:30 You'll see it's marked completed. And then I have two remaining for tomorrow. So what's going to happen is for each of these assets, we have the parts of what we need. So if I'm doing a 18 cell... air cleaner and then 10 four cell air cleaner and I marked off that I did three of the four cells, and the 18 sell, I'll be able to see which parts were associated with each mark that I consumed. Those I say consumed just in the sense of use the clean one. I realize you're taking the old one out and, you know, bringing it back for future use, but able to track, that occurred. And then when I show up for the job tomorrow as Danny or Danny shows up because I'm not even scheduled for tomorrow.

--- *Assets* ---

MICHAEL

17:18 Danny is going to show up tomorrow and see that there's these are the two assets that still need to be done and the parts that are needed for that. So, no.

SCOTT

17:29 Scheduling the asset one one day or the other.

MICHAEL

17:33 Yeah, you absolutely could. So we could have broken this out and just said only in this example, we could have broken this out and scheduled an appointment for the 20 eighth, that was only roof top one and rooftop two, and an appointment for the 20 ninth that was warehouse whatever unit that is a chiller or something... right? Like, so I could have broken that out into two separate, two separate jobs essentially on two separate days each dealing with different groups of assets or I could have assigned it out as this full group of assets needs to get done over the course of this week. And then I address those as I go.

--- *Assets ends* ---

DANIEL

18:12 Yeah, you've got both options there. However you guys want to track that and issue that to the technician that's how they'll see it and that's how it'll be displayed.

SCOTT

18:21 Still be one like sign off service or sheet at the end?

DANIEL

18:25 Yep. That will still be one job number that's correct? Okay. Which again, to your point, you complete that job, get that signature and then we'll be ready for an invoice, 100 percent.

SCOTT

18:37 Yeah, because that's what we're looking for. Like when they come in the morning, they got, to put on their truck. They obviously can't load two days on there. So, right? I'm gonna service these ones today.

--- Assets ---

DANIEL

18:51 And that's the importance of tracking those individual units or groups, right? Because you need to know the assets. So you're prepared, you've got everything in stock and you're ready to go back and make that trip without having to stop and go pick up a part or make a return trip. Yeah, this is what our customers do every single day. They just do it on rooftop units, HV, AC units rather than air filtration systems. But this is really why we were designed for this type.

SCOTT

19:16 Work. All right? You can pull a report based off of what's needed or like how to the tech, see what it needs or whatever for that given day.

--- Quote templates ---

DANIEL

19:28 Yeah, we'd run a job items report. So we just simply run an items report based on the day... location technician. And then you'd see any parts that are needed under each item code.

MICHAEL

19:44 And I...

DANIEL

19:45 Go ahead.

MICHAEL

19:47 I say if you go actually look at the job with the job items, yep, I was just gonna show how I marked, the parts that I used as consumers so that they're no longer needed.

--- Parts management (inventory) ---

MICHAEL

19:58 So if we scroll down to that job, we were looking at, you see how it shows when I use them as used on. So now we know that I don't need three more, three more for three pounds of our 410 refrigerant in this case or three more and whole gaskets because I've already use those. So what I'm going out today, I only need the parts for the other assets. And so that's so you're not just marking what asset you've already dealt with, but that's also going to be reflected with the parts you consumed, the filters, you swapped essentially. Yup. Okay. Danny, I don't know if you mentioned it to these guys just while we're on the topic, of swapping parts, about the idea of using tags for the quality of the filters.

--- Assets ---

DANIEL

20:48 Yes, discuss it a little bit yesterday about that. So, you know, if you're on a specific job or piece of equipment, you know, you can go ahead and create a tag so that for some reason we had a, you know, this is always an a filter but we were on here. Unfortunately, we had to replace it with a B. So next time we come back, we know if we've got an a swap it out, that would all live under tags. So that way you guys could see that you can report on it, run reports to make sure that, you know, when these as come back in, we want to see which BS have been swapped out or as been swapped out for. So and so forth, your tags will be your best friend for that.

--- *Assets ends* ---

MICHAEL

21:23 Yeah. Scott, after we talked, in the warehouse last week, when I was driving home, I was talking to Danny and I was explaining to him how, you know, you guys try to keep track of if, you know, it's a brand new fresh filter, you know, the bin and then, you know, the bin and the C in and Danny pointed out that be a great use case for tags. And so I just wanted to make sure we touched on that.

SCOTT

21:45 Okay.

MICHAEL

21:49 Now, as far as, the parts in the, you know, managing which assets have been addressed and which parts are still needed. Do you feel like you got clarity on that piece of it?

SCOTT

22:01 I think so.

SCOTT

22:03 Yeah. I mean, one thing is just, is there a way to pull a report for the, like you saw what we use for the day, right? We have a board where it all pops up. Would there be a user, whether it's just we call it shop or whatever it may be that, what we pull up so that the individual we call it by truck. But we could see that... they would show up on a board that we have our seven guys, all their jobs pulled up underneath them that.

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

DANIEL

22:34 And the goal of that is just to know what parts they use throughout the day.

MICHAEL

22:38 They're gonna need today.

SCOTT

22:39 What they need to load on?

SCOTT

22:41 Every morning the guys would come in, they go up to five to seven truck, however many are going out and they would, we have what we call a load sheet and has their listed out with the filters that they need today. And it's all listed up by truck. I'm not against it being by search that's fine, but just kinda thing because we have helpers in the shop who are not going out on the job, but they will make sure that those filters have been tested that they're ready, you know, ready to go on the truck for them.

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

DANIEL

23:12 Yeah. So your technicians would not be unless you gave them a permission to run this report. Like I'm doing now, they would not be able to see that on the application. Hey, I need X amount of filters for all my jobs for there, for this one job without opening up the job and looking at that... job. Yeah.

--- Tech time tracking ---

MICHAEL

23:34 Danny, I think so. Right now, they print out a sheet, put it by the door so the guys can look at this and say the breakdown of here's all the jobs. So, I don't think we need to give the technicians the ability to run the report themselves because they're gonna see what they're using on each job we want is the ability for them to just display the information on the screen so the guys can grab what's needed.

SCOTT

23:55 Yeah.

DANIEL

23:56 I'm not sure of any other workaround than running a job items report.

MICHAEL

23:59 No less. What I'm suggesting is that we use the job items report. But what I'm pointing out Danny is that it doesn't require the tech to have that permission. Gotcha. You.

DANIEL

24:09 Yeah, I'm sorry, I misunderstood. I thought you wanted the technicians that have this without you all need to do something manually.

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

MICHAEL

24:15 So, they'd be able to display the detail yep, you know, the similar to what they're doing today, display the detailed breakdown. So the guys know what to load the truck. And then when the guys get to a job, they can see exactly what they need for that specific job. Yup. So, yeah, I'm just.

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

DANIEL

24:34 It'll be done on the job items filter. You'd run your date for all the PMS or inspections that are do during that frequency, you'll get a list of all the jobs and items that are needed for that particular week or for that technician. And then again, you would be able to source that you could either do it by job or just say, hey show me all the jobs that this technician needs all the items he needs for today.

--- Tech time tracking ---

DANIEL

24:57 So there's a couple of different ways to do that. But job items report is how you're going to get that report out to your guys?

MICHAEL

25:03 Yeah. And what, and what I would do is I would just do the export of that report and just pivot it and pivot it by technician and it'll give that info.

--- Accounting ---

MICHAEL

25:13 It'll be nice and clean, they'll you know, because then you'll have a count of each part number. So you're gonna set your pivot table just, to group by technician. And then you're going to, you know, which is well, you could even create a macro for it and then... do a count of each item, need it.

--- Pricing ---

MICHAEL

25:34 So then they'll get a report. You know, you'll have that report that you put up that says, you know, Bob in truck four needs 17 four calls, you know, 17 of this sell and 26 of that sell. And then you've got that information right there and it's all summed up for him.

--- Pricing ends ---

SCOTT

25:56 Right. And then how are service calls handled? Like if somebody calls in and wants?

MICHAEL

26:02 Servers, yeah.

SCOTT

26:04 Because their air cleaners falling through just.

DANIEL

26:09 That would be done, right on our dispatch board. So you get a visual of where your technicians are scheduled be for the day. And then at a job, this is where let's just say somebody from a hardware calls in. We ask them which branch they are. They tell me it's the one out NC perfect. All their detailed information populates on the left hand side. And now a dispatcher says, hey, this is the emergency service call that came in today. Unit is down. What unit are you working on? Danny? Hvac unit? Okay. Go repair... I could spell. And now, from here, you can either just assign this to a technician right away. We know who's going to get there or we can save it.

DANIEL

27:01 It will show up in your unassigned queue. So that way once you figure out which technician can get to that job, you easily take it and drag it onto their schedule. Once you put that job onto, the technicians schedule, they're then notified in the mobile app that there's been a schedule change and here's what they need to go to.

SCOTT

27:23 You'll...

DANIEL

27:23 Also have a job board up top. So, as these calls are coming in, you don't know if you can necessarily get to them right away, you don't wanna lose track of them. You won't they'll be on a board that you guys will create. That makes sense to your workflow. So that way again, we're just gonna take these jobs as are coming in and push them out to the technicians as they have availability.

SCOTT

27:44 Yeah. Okay.

DANIEL

27:48 Pretty cut and dry.

SCOTT

27:50 Yeah, I think so.

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

SCOTT

27:51 And then the other way was, like if we're waiting for parts for a particular job or an deficiencies or something like if we had, or how like.

MICHAEL

28:03 Still like.

DANIEL

28:04 That would be done is, hey, you know, I'm on site Scott, I need a couple of calls. I don't have them well as a technician, I'm gonna notify in that on my work order, I need a widget and I need that part to be ordered because we don't have it an inventory.

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

DANIEL

28:19 Perfect. Well, now, when that is logged by the field tech, under our jobs board, your warehouse is gonna have a thing that says, hey show me all the jobs that technicians completed today or in the past where I need to go ahead and order parts. Now, all these jobs pull up.

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

DANIEL

28:40 So now your warehouse can either look for these parts in their main warehouse or order them as they are following through with this. The status is, will change and then the office will say, hey, great. Show me all the jobs where the warehouse received the parts, and we can go ahead and get them dispatched out. Now, you'll get a list of all the jobs where parts have been ordered and received and they're ready to be put in the guys Van and installed at the customer location.

SCOTT

29:07 That, okay?

DANIEL

29:09 And you may have partial order, full order. Maybe you can go and get half the job done because the, you know, phase a is there. So again, under the jobs board is where you'd have any type of completed service all the way down to incomplete or parts needed. And then you guys working currently in here and then update the status is as you're receiving parts.

SCOTT

29:28 That create POS or how does it know when you received the parts in or whatever?

MICHAEL

29:33 You need a, to record that they've received that.

SCOTT

29:36 Yup.

SCOTT

29:43 So still in Quickbooks or whatever?

MICHAEL

29:46 Yeah, we're not gonna be, we're not gonna take over the accounting function for you. That's gonna stay in your Quickbooks. But for example, we can see that we ordered a widget here from acme supplies on that po.

MICHAEL

30:04 And are you on?

DANIEL

30:06 So, you can see this... you'll have different statuses for your po, right? So we're coming in here. Your warehouse is gonna say they're gonna choose the part the vendor that they went to, the purchase order number they used and the status. So as they're changing the status, the job will update as well. So that way they don't have to notify anybody or do anything really more on their end, they can just say, hey, we received the part, it's ready to go or it's on order. So, you guys know, a customer calls in whereas this part, you don't gotta call Phil on the back. You can just pull up that work or, and say, hey, it's on order, it's not here yet.

SCOTT

30:43 So actually...

DANIEL

30:44 Be able to do that.

SCOTT

30:45 I order comes in with something that has just has a po number on it. Can you search that by po number so that you can know who it's for order...

DANIEL

30:56 Typically, yes, as long as it's not like a four numeric order, you know, number there. But if I do type in this, let's see... copy that in.

DANIEL

31:14 No. So that one is too general... you'd have to go to the customer location to search for the po, unless I'm missing something Michael?

MICHAEL

31:25 Yeah. You, you would need to try to think so, you're getting a po, you're getting a part, you're getting whatever in your saying, hey, where did this one come?

SCOTT

31:36 From? Like who's it for? Like what job is it for?

MICHAEL

31:39 Yeah, that's where.

SCOTT

31:41 We're trying to get our line of communication open. Like right now, we'll receive a box of maintenance. And so there might be a po number on it and our guy receiving it's like great lease for we don't know anything about it and he doesn't say who it's for it's just that we ordered them. We're trying to figure out the way to streamline that so that when something comes in, some of it might be for inventory or so and if we have to write it down or whatever, that's fine. It's just be nice to.

MICHAEL

32:15 Yeah. I'm actually looking at the job items report. Do we know if that includes the po number as a filter when you export that dandy?

DANIEL

32:23 Yeah, I don't believe, so, it's downloading for...

MICHAEL

32:26 Me right now. I think I made too big of a report. I did it for like two months, which was excessive.

MICHAEL

32:37 Here.

SCOTT

32:39 They need to add a filter in their po number?

DANIEL

32:43 Yeah. I'm trying to just...

MICHAEL

32:46 Here we go. I just...

MICHAEL

32:55 What, Danny, can you in the chat? Put that po number that you copied real quick? Sure.

MICHAEL

33:19 And it was a widget for acne supplies. Yes, Danny here's, what I want you to do is to show these.

DANIEL

33:26 I stopped sharing. You take over.

MICHAEL

33:28 You can show it right here. You're almost there in jobs in the top left corner where it's right above job number.

DANIEL

33:35 Yup.

MICHAEL

33:36 Change that to job item... yep. And now just type that number in item source name, reset and then just type the po number and item source name. Okay. So the item source names on the right? Yep, gotcha. Hit search.

MICHAEL

33:58 And there you go. Because do you see?

DANIEL

34:01 Because that's right? We source the item?

MICHAEL

34:08 So, if you open that up, you'll see it takes you right into the job that it's associated with. So that's how you'd be able to find it. Scott is you can type in that po number that, you got with that box of magnets and...

DANIEL

34:22 Right. Because it's under source, not, it says source code instead of po. So that's why? Okay.

MICHAEL

34:27 So, if, you know, so if you click back into that acne supply box right there, Danny, just to show him what it looks like... to the right of it. Yeah. So when you're capturing that po number there, it's listed out in the source so that it is searchable in the system through that job item report.

SCOTT

34:43 No, you would just change the status to receive.

MICHAEL

34:46 Yup, you would just update the status then to received, you know, it would previously been ordered. Now, you make it received.

DANIEL

34:53 And we...

SCOTT

34:53 See, that doesn't push into Quickbooks on, does it?

DANIEL

34:58 No.

MICHAEL

34:59 No, that's the item status.

SCOTT

35:02 Yeah.

MICHAEL

35:03 No. And then the, and then to just take this full circle, you know, to the original question. Now that it's received, maybe every, you know, now that it's received, you run your, you, I mean, if it's just one item, you could just run, you could just schedule out this job again.

--- *Dispatch* ---

MICHAEL

35:20 But if it's something where you were waiting on parts for a job, you could always run that jobs report. Danny showed earlier of jobs where parts are received that aren't yet scheduled and then schedule them out. So.

SCOTT

35:38 All right.

DANIEL

35:41 Work, Michael?

MICHAEL

35:44 Could be helpful, Danny?

SCOTT

35:45 And then I got a random question. This is from BuildOps wants to know if you ask if you charge more for building out certain forms?

--- Dispatch ends ---

MICHAEL

35:57 George...

SCOTT

35:58 Is...

DANIEL

35:59 That is that BuildOps? Is that there compelling event to us? Do, we charge?

SCOTT

36:04 They said they've heard that you guys charge like if we want a custom, I don't know exactly what they're referring to.

MICHAEL

36:11 So, so Scott, what I'll answer it for you. What they're referring to is we have a product called service forms which is like a choose your own adventure guided process that we haven't even gotten into to with you because it isn't necessary for your business use case, commonly used for fire inspections, commonly used for very complex PMS.

--- Forms ---

MICHAEL

36:36 And, yeah, and those, we have our default forms. But if someone wants a fully custom form, yeah, we charge for it because.

DANIEL

36:45 149 an hour, right? The other side to that is if you guys during your filtration inspections, maybe you have a form that wants to get filled out inside of service trade, you'd be able to have a flat file PDF form that if you have one already created great, you can upload that the service trade. There you go. If you guys have a piece of paper that's an inspection form, and you want to turn that into something like this, where you've got fill fields where the guy opens up this form and the store name, the system, name, the date, work or number, all that's pre entered for them.

--- Forms ends ---

DANIEL

37:18 And now they're just coming through and checking a box and putting in their notes. It would cost you 149 to create that form. Will also teach you how to do it for yourself because we don't want to be logged down by that. We want customers to have the bandwidth to be able to not just rely on us but have the tools to operate the way they need to and then rely on us when they can't figure it out. So, yeah, it's 149. It's one time charge. How many forms do you guys have that you'd need to have created like this?

SCOTT

37:48 Partly none.

DANIEL

37:50 Gotcha. My.

MICHAEL

37:50 Understanding in our conversation, Scott was that it wasn't even relevant. So, I hadn't brought it up. You know, if we're gonna bring something up, we'll tell you what it costs but.

DANIEL

38:02 You should go ask BuildOps for a customer reference, my compelling event because we've had so many phone calls over the last four months of people that either bought service or bought BuildOps. And we're lied to from day one and they were sold on all the onboarding free. There's no time line, take your time six months down the road. They're still not onboarding and they're calling back to server care. They're calling us because they were duped. I never get into this type of banter, but it just, it gets under my skin as.

MICHAEL

38:32 I know, you get frustrated when they try to hit us.

DANIEL

38:35 Two questions, but, you know, anyways, yeah.

SCOTT

38:39 Married it down to either do nothing or do go with you guys, but...

MICHAEL

38:44 Yeah, Scott.

DANIEL

38:45 The...

SCOTT

38:46 A bit like, the use sales to the manager. Yeah, I can do that for free and I can, the manager says, yeah, yeah, I can do, I can do this and...

DANIEL

39:01 I would beg you guys if you don't go with service trade, please don't do anything because they're and that I'll just leave, that Scott.

MICHAEL

39:09 What we'll say is, you know, BuildOps has as they're an up and comer and they have some cool technology. They, they may oversell at times and they sometimes use tactics that I, you know, asking me what we charge for forms. I'll gladly tell you, right? If you want us to go do custom work for you, there's a price on it, right? But as Danny mentioned, we'd always rather just teach you how to do it yourself. So so that you don't keep paying us 150 dollars because candidly, we're not in the business of form design, right? We're in the business of software design. And so, we want to provide you the software. But yeah, if you need us to make the custom form which you're not even gonna use 150, so, but.

DANIEL

39:54 Well, that just goes to show how much they know about their business, something you guys need.

MICHAEL

39:58 Well, anyway, if it turns out you need it, we're glad to help you with it, but I purposely left it off in our discussion so far because it seemed not relevant to any of the use cases we discussed, Scott. So.

--- Tech time tracking ---

SCOTT

40:11 Okay. Yeah. The next thing was the difference between the standard time card and the upgraded one other.

DANIEL

40:20 So, what happens in service trade is that we have a time card tool where your line items and your clock events are poured on the time card for the technician to come in at the end of the week to verify all their hours, make sure everything's accurate. Once they've done that, they can go ahead and verify that, yes, everything is correct. These are all the hours I work for this week. I wanna submit that to payroll. So now you guys would go ahead and get that alert. You'd review that time card. That time card is gonna show you where all the hours were allocated. So, if I've got eight hours on this job, it doesn't make sense why I was Danny there for eight hours and go ahead and open up that service trade job and get a full view of everything that happened. But at the end of the day, this is where we automate the process of taking all the information off the job, put it on a time card for your text review and then a final review for admin. And this is where you can go ahead and say, hey, Danny, you were only on that Monday job for two hours. Where are the other six hours, request a change or you can go ahead and approve it. And now you guys are going to get paid, right? It will sync to your payroll and service trade natively.

SCOTT

41:31 I would sync with Quickbooks online payroll.

DANIEL

41:34 Yep. Natively, what you'd have to do in the platform would be under job items or clock events. You'd say, hey, I need to see all of Danny's labor items... that's gonna be here.

SCOTT

41:54 What you just showed was, the additional one?

DANIEL

41:59 Yes, this is a product add on. It's like an extra 14 or 16 dollars a month. It's like a minimal. I think it's a.

--- Pricing ---

SCOTT

42:07 User.

DANIEL

42:08 Per user. So, what do you guys pay now for, what do you pay for the time card to we have now?

SCOTT

42:15 I think it's 25 bucks a month total or maybe 50 dollars a month total. I'm not sure for everybody. Yeah, it's just like up to 25 employees.

--- Tech time tracking ---

DANIEL

42:29 Gotcha. Just like ServiceTrade then if you didn't want to pay for this here, you can go ahead and just export those labor items and it will go ahead and give you all the hours for each technician that dumps off into a CSV which you can upload into Quickbooks. So you've got two different options here. This is just more of a streamlined process that ties everything back to the job and the way.

MICHAEL

42:51 I look at a, Danny, and Scott and team, the time card tool is essentially extracting the exact same data that you could report on and extract to begin with. It's extracting it. And it's a tool that's then presenting it in a nice clean summary format. But more importantly giving the tech the ability to approve their own hours and the management the ability to approve their hours as well. So it's the same underlying data that's going to exist. Either way. The difference is the paid tool, is, you know, a clean presentation that gives the ability to just approve it right there rather than, you know, doing so in your other software.

SCOTT

43:30 So the, even the non pay version, they would be able to like they come in for first hour or whatever they're just in the shop, but they're not like quotes billable time or whatever. They would still be able to just clock in like that, they're at the shop and then clock in when they leave and whatever like that is that.

DANIEL

43:52 That's correct. You'll be able to take this time card tool and configure it the way that you have it laid out in your organization, right? So you may have like, however, whatever verbiage you want, you'll have all those options available for your technicians to choose from. This is just a demo rate that we have created, but yeah, certainly customize that to your verbiage. So you can track. My guy only works seven hours, but clean his Van out in the morning for an hour.

MICHAEL

44:15 You did, you know, an hour of job preparation? So like you could always clock in as job prep or travel or whatever else you may be doing even if it's not on site customer billable time.

SCOTT

44:27 Okay. But that just, but then we just have to export that as a CSV. And essentially what we're doing currently with our pay clock is not directly connected to Quickbooks anyhow.

DANIEL

44:41 Okay. So that was, the, one of the topics. The other topic I just wanted to cover was helper versus non helper license. So, we have the fundamental kind of reasoning of you have your full time guys that are out there that, are your eyes and ears responsible for the job?

--- Pricing ---

DANIEL

45:04 And, you may have three or four or five helpers at, you know, maybe they load the Van, you send them on different jobs throughout the week just to be an extra set of eyes and ears. So that's why we offer a regular license and a helper license as relates to the helper license.

--- Tech On-site ---

DANIEL

45:21 What they cannot do is they cannot create job items. They can't enter in any assets. They can't any comments to the job. They can't get a signature from the customer. They can't report a deficiency and they can't create an invoice. Essentially, they're there to be able to view the job clock in and out.

--- Deficiencies ---

DANIEL

45:40 They can take pictures. If they're working on equipment. You want them to snap a photo, they can add attachments, but that's really, it, the goal there is to give you a visual of the, of all your technicians and not separate those three guys from the rest of the crew.

--- Tech time tracking ---

DANIEL

45:55 When it comes time just to tracking where everybody's at and what needs to be handled. And that would be half the price, of a full-fledged license.

SCOTT

46:07 There we go.

MICHAEL

46:10 This guy, when we were talking, it sounded like, the helpers, the helper role, you know, always was going out with someone else who was lead on the job that's accurate, correct?

--- Tech On-site ---

SCOTT

46:20 Right. Yeah.

MICHAEL

46:21 Yeah. So, that would be the use case here because they're not gonna have, you know, they'll be on the job and they'll be able to clock into that job. They'll be able to see what they're supposed to do on that job, but at the end of the day, it's going to be the lead, you know, the full technician license that's the one that's gonna say, hey, we completed.

--- Access to information ---

MICHAEL

46:36 X, we completed why, you know, here, we got the sign off from the customer, those functions because they're, the lead whereas the helper is gonna log their time, take the picture.

SCOTT

46:47 You...

MICHAEL

46:47 Know, help out, see what's going on but they're not gonna have the full capabilities. So.

SCOTT

46:54 Okay. Like a guy that's always in the shop but he might want to be able to see what the other guys are doing. Will it just be an admin role kind of was free or whatever?

DANIEL

47:08 Right.

MICHAEL

47:08 Office users are without charge. The only ones they're going to have a charge are going to be the technicians, you know, people that are getting assigned to jobs, and supposed to be marketing things, complete things like that helpers at half rate. And then office users, meaning, you know, Scott and Bruce and team, those you guys are all going to be free. You can have other office users like a guy in a warehouse who's just updating statuses on parts received that could be free. You asked if it would just be an admin license.

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

MICHAEL

47:35 I want to clarify that you can have different permission sets on those office user licenses as well. So, Scott, maybe you have all the permissions in the world, but the person in the warehouse who's just marketing things received, you know, doesn't have the ability to send an invoice or doesn't have the ability to create a new job, something like that while they do have the ability to update those items, statuses. So we can create those different roles for, your guys.

--- Access to information ---

SCOTT

48:01 Okay.

MICHAEL

48:05 Anything to add on that?

DANIEL

48:07 No. Well said.

SCOTT

48:12 Alright. One other thing which isn't a major thing, but can, from the phone app or tablet, can you scan a part number? Like can I read a QR, like a bar code or?

DANIEL

48:26 No, not, no, not native in the app, no.

--- Deficiencies ---

MICHAEL

48:29 Okay.

DANIEL

48:31 That they're adding down the road, but as of right now, no, what I do in this case is they have this widget on your phone called scan key. And what that, is it's simply just a picture, right? Take snap a picture of the bar code, or the... name play that you're trying to upload in the service trade, but natively in our platform that's not an option as of today, but it's something that may be down the road.

--- Parts management (inventory) ---

SCOTT

48:59 But I just, they're trying to like the pull part off of the truck and they can just scan a code or whatever that as a part used or whatever. But yeah, that's not a huge thing. I was just more.

--- Purchase decision ---

DANIEL

49:10 Yeah, that, that's been asked that's a road map but nothing that I feel confident saying, yep, that will be there in the next six months.

SCOTT

49:18 Yeah. Okay.

DANIEL

49:24 So, I mean, you mentioned Scott, it sounds like you, you've pushed out BuildOps and anyone else is down to service trade or doing nothing. You know, what are your thoughts today as to why you wouldn't move forward to service trade?

--- Purchase decision ends ---

SCOTT

49:38 But I guess I like the service trade side. It's more a conjunction of service trade and our boundary... not being able to handle the emails. I guess yeah have an internal discussion so... major, that is if we need to keep three or four Salesforce licenses or something. But then is there any integration between Salesforce and Northboundary? Or like?

--- Accounting ---

MICHAEL

50:09 So, so there's you wouldn't do between Salesforce and Northboundary. I think Salesforce and ServiceTrade is, would you wanna do? But there's really not an integration there. Again, you could export data and import it into service trade. We do have bulk imports, you know. So if you wanted to bulk import assets and customers, things like that, absolutely, you know, when Danny and I had been talking, one of the things you know, that I kept saying was, is we think service trade is an amazing fit for you.

--- Accounting ends ---

MICHAEL

50:39 And we think Northboundary could be helpful. I wanna make sure that we're clear that we have customers that are service rate only. We have customers that are Northboundary only and we have customers that start with one and then add the other. So if you are looking at this and you think service trade is gonna make my life a lot easier. You could keep, you could start up with service trade, keep a couple of Salesforce licenses to manage, your opportunities and customers there initially. And, you know, three months down the road, you go. Okay, let's try out Northboundary. You could add it later. It's not something that has to come from the start. So I want to be clear about that.

--- Pricing ---

DANIEL

51:17 Well.

SCOTT

51:23 And is there a minimum amount of money or boundary licenses we get?

MICHAEL

51:28 Three. So, so Northboundary has a minimum of three sales users. So in the same way that service trade is only priced based on technician licenses and helpers, Northboundary is priced solely on the sales users.

--- Quote templates ---

MICHAEL

51:41 So people that are going to be creating proposals, you'll note there's a pattern. We like to tie what we charge for to the folks that actually generate the revenue in any given situation. So you'd have a three license Northboundary minimum... and, you know, you could say, hey, we're gonna add that to do our proposals. And great.

--- Pricing ---

SCOTT

52:00 Those are, I was trying to remember, are those 40 dollars in user or 45?

MICHAEL

52:07 Northboundary license. No Northboundary licenses are 99 dollars per user per month per sales user. So it comes out to 1,188 per year for 1,000, 188 dollars per year for one Northboundary license or 3,600 dollars for the minimum three.

--- Pricing ends ---

SCOTT

52:33 Okay. And then have you, I was trying to remember if I've got a full-fledged quote from you or not?

DANIEL

52:45 I haven't I just wanted to, I have it ready to present to you today. I just wanted to confirm that, you know, I had the accurate headcount of users that you would look into be implement with service rate. Give me one second. I'll pull up for you guys.

--- Pricing ---

SCOTT

53:03 Well, right now, the... technician is... count is fluctuating by the day. So I don't know, how do you... yeah, how often can we go up and down on user licenses? I guess it was another question like if we had got rid of one helper and one tech quit on us... do you have to keep those open for the full year? Or how's that? I mean, we'll plan on replace them with somebody, but I didn't know if we could say month.

DANIEL

53:40 Yeah. I mean, essentially, yeah, you're locked in for, that license, right? If, you, if you pay for it on your contract, you know, they're not gonna... drop like this but not gonna post at, you know, six months of non usage to your next contract, you would be liable for that... if you need to add. So you hire a technician, you can easily just add that technician. You have to call me or an account manager. You have the authority in your account. So great. We just hired a helper or a full-fledged technician. Let's create an account for him. If we don't have any available for him and you can do that at your own accord. At that point. If you create a user six months into your contract, you don't be paying for six months of that usage, you wouldn't be paying for a full year. Does that make sense? Okay. So I had you guys at nine technicians for helpers, and then if you went with Northboundary three sales users, is that accurate? Okay. So this is what you guys would be looking at as far as a first year investment with service trade. Your total cost would be 28 492.

--- Implementation and ongoing support ---

DANIEL

54:52 What does that include? That includes the usage of service trade... as well as the onboarding, right? Our onboarding is a very stringent process where anywhere from eight to 10 weeks, it's gonna take you guys to onboard and get live with service trade. You guys would work with a project manager and you'd meet with that project manager once a week before your contract starts. You have a kickoff call to make an introduction with that PM. And then you set an agenda right after I've met with them. I'm gonna explain why you guys became a service trade customer, what your goals are in return? They're going to let you know what data they need, how, what format that data is needed. And then they start entering all that information into your service trade account. About halfway through the account. You guys will then be trained on how to use the platform. So if you're a field tech or an office admin service trade is going to provide the training certifications for those users. So that when you guys go live, you're confident that everybody knows how to use the platform, they've been trained. They've got their questions answered and they're ready to go. We're very strict on that, right? We're going to give you till 1,215 if we decide these dates are right to get you up and running.

--- Implementation and ongoing support ends ---

DANIEL

56:01 We don't want a back. We don't want to push it out three. Or four weeks you made a purchase for a reason. Let's get up and running. We have the opposite mentality of software. We're hey, take as long as you want. You're paying for the software, where we're going to get you up and running.

--- Pricing ---

DANIEL

56:16 And again, moving forward, this is what your cost would be for your licenses for your nine technicians, your four helpers. That would include if you guys want the service card time, the service trade time card, which is 168 a year per user, and then your three Northboundary salesman, which is 1,200 dollars a year... for each user. So your total cost and recurring cost next year if you stayed at this exact amount would be 23 five because your one time account set up of 5,000 dollars would go away. So as I throw that number out to you guys, is that what you expected? Have you gotten any pricing from any other vendors?

--- Pricing ends ---

SCOTT

57:04 Yeah. I mean that's obviously we've family business. We don't want to spend any more thing. So, yeah, I think we would probably do without that service time card for one. If we want to add it later. We could sure, right?

DANIEL

57:32 And, you know, I don't want to pull the used car salesman trick in here and it's not, but it's the end of, our quarter, right? The upcoming end of our quarter. I've been working with you guys for a while. So, if I'm somewhere reasonable within pricing, you know, I have certain thresholds that I can give for discounting. I don't have to go to my manager or anything. But I have a threshold that I have, but I'm not going to bring that up unless it's hey, we're relevant. We're close. We feel like service trade is the way to go. Let me see what I can do for be clean specialties, to make a fair arrangement for both parties, I'm more than happy to do that, but I won't even bring that into the mix until you guys say, yeah, we think service trade is good.

--- Pricing ---

DANIEL

58:13 Can you do anything on price, right? So it'd be a minimal discount for first year signing as a thank you gesture. But it's something that we try to offset a little bit of that cost as you guys are onboarding and it's just an easy way of doing business set of going back and forth negotiating. You know, this is where we're at. But as you can see, this is M SRP.

SCOTT

58:34 Yeah. Okay. Yeah. One thing BuildOps, that was that through in three months free or whatever.

DANIEL

58:42 Sure. And I bet you those people aren't even on using yet. Sorry that, but...

SCOTT

58:47 They, they said it goes on the end of your contract or whatever just kind of, I thought it was kind of a neat idea but they do it take could take three months to get it up and running. They don't want to pay for it. Well, I... sure.

--- Customer engagement ---

MICHAEL

59:04 Scott, let me ask you this. If you're gonna go, let's just assume you said service trade is the right solution for us service trades. What we're gonna do, we're gonna adjust our business, and work with service trade, we think it's going to help us drive more revenue. We think it's gonna make our text more efficient.

--- Customer engagement ends ---

MICHAEL

59:22 All of that realistically, is this something, that if you're making that decision, are you confident enough that you'd probably use it for more than one year?

SCOTT

59:36 Yeah. I mean if we actually use it, we probably would was Salesforce, we've got paid for some of it, not use it.

--- Pricing ---

MICHAEL

59:45 So, the reason I ask this is I typically like, to do two three year agreements and I like to do two or three year agreements because my view is always, if you're instituting new technology that your technicians are touching, that's a friction point.

And, I don't ever want to introduce something to technicians that they're not gonna use for, you know, the foreseeable future, right?

--- Implementation and ongoing support ---

MICHAEL

1:00:06 You're feeling to take the time to adjust your business practices to implement the technology, to train your technicians to get all that going. I feel like you almost gotta use it for two or three years just to make up for the investment you made and the time and all of that because it is a robust onboarding.

--- Implementation and ongoing support ends ---

MICHAEL

1:00:24 And, you know, we don't want it to be a situation like Salesforce where you buy it and don't use capabilities. We're going to put you through the ringer during onboarding. We're going to spend a lot of time with you and get this set up and that's going to be a time investment for you and your team.

--- Pricing ---

MICHAEL

1:00:36 So, you know, I guess my question is, you know, is there an appetite for anything like a two or a three year agreement?

SCOTT

1:00:44 I don't know at six months in, I might be gaining to do that, but at this point probably not.

MICHAEL

1:00:51 Okay. Just got to ask because that always gives more flexibility, right? So that's why I ask.

--- Pricing ends ---

SCOTT

1:00:58 The, I mean if there is an escape pause at it.

MICHAEL

1:01:02 If there's an escape clause on it, I lose the flexibility and pricing because that, it's not a commitment, right? But no, I totally understand that. Scott, especially if you have experience where you've bought software and didn't feel like you got used out of it, you know, it's that's not an uncommon experience for people purchasing software.

--- Implementation and ongoing support ---

MICHAEL

1:01:22 I've been selling software for a long time. You know, it's one of the things I like that we do here at service trade is such a rigorous onboarding to ensure that scenario doesn't come up because you're buying it, we want to get you up and running and get you using it so that you renew it at the end...

--- Implementation and ongoing support ends ---

DANIEL

1:01:37 Of the year. So. Okay. So where's your head space at now for you guys? You know, there's a couple of people, in the meeting.

SCOTT

1:01:52 Yeah. How, I mean, how much longer can we still come back and get the, your minimal price decrease? Have a discussion with the team here? And because.

DANIEL

1:02:11 Yeah.

SCOTT

1:02:12 It's not a full replacement for what we have. So it will be like an additional cost. And so I was really open that we could just ditch Salesforce, but I don't know what we can.

DANIEL

1:02:27 On the same.

MICHAEL

1:02:27 Salesforce side of things, the main thing you're losing out on is that ability to have your emails automatically sync.

SCOTT

1:02:32 Yeah. What's...

MICHAEL

1:02:33 The use case there typically, you know, what's the use case where we're seeing those emails synced, is used most often.

SCOTT

1:02:42 We got like one guy that to market and he will want, he sends emails right from Salesforce. But then he also, if we're following up on quotes, he can see whether anybody's sent him an e-mail recently or anybody can see it, but, you know, see whether somebody's followed up on it or not then. And then also on the service side, we can see if anybody's reached out to them about, hey, you're due for service next week or next month or whatever. And then what their response was, if they wanted to go ahead without and say, hey, it sounds okay or not like.

--- Quoting ---

MICHAEL

1:03:18 That makes perfect sense. And, and I absolutely see the value of just, you know, hey, it's automatically sinking or I'm sending it directly from Salesforce. So therefore I don't have to copy and paste it in and it's already there. I do think, when you mentioned following up on quotes, are those quotes for new, you know, new recurrent service agreements or quotes like repair quotes?

SCOTT

1:03:42 Have both like repair quotes, it wouldn't be as much but it'll be new service or new projects.

MICHAEL

1:03:50 Okay. Because I do want to highlight that. One of the nice things about sending quotes, from sales or from ServiceTrade itself. And you could send quotes from service trade for things like repairs or small projects. One of the nice things there is you actually do get visibility to, did they view the quote? When did they view the quote? And so you could run reports on like which quotes did I send? That? No one's even opened up to then know to follow up with those… you know. So there's a give and take.

SCOTT

1:04:24 Yeah. Well, just mainly leave the prospecting side of things… then like when.

DANIEL

1:04:34 Yeah, the prospecting side here, point, yes. But for like renewals or quotes, you're able to send those right out through service trade. And then when you're sending those renewals quotes on a job, really any document there's history. So I can see, you know, if I'm a sales manager, hey, has Danny followed up with this guy at all? Looks like Jonathan did send a quote over to queue, but that customer never opened up the e-mail. Let me go ahead and call them. So, you know, if you're sending the documentation through service trade, you will be able to get that on the history tab. And anybody can see who followed up who actually wrote the quote out? Who reported the quote? Did a salesman follow up? There will be a huge history tab to see all those action items as well as customer engagement. If the customer open it up, you'll see that Johnny just opened the quote at 752 today based on their IP address.

--- Quoting ends ---

DANIEL

1:05:25 So you will have probably half that functionality in service trade. Just the ultimately, the initial prospecting is maybe, well, you, where you will lose that gap and.

MICHAEL

1:05:36 Danny, do you mind if I share my screen just momentarily? So just showing the Northboundary side. So while you're not able to, you know, you're losing out on that e-mail syncing. And, I don't want to diminish that because that is, you know, that's a loss. You can still be setting your tasks. So for example, when I'm prospecting, I always, whenever I call some.

SCOTT

1:06:03 I...

MICHAEL

1:06:03 Set myself a follow up task. So I can say, you know, what? Let's make sure, you know, I'm calling Scott on the 20 ninth, then I can set a specific time where I typically just put them all in the morning. Great I can set a priority. And so I'm still getting a task to call you Scott, right? And I'm still going to be notified on the 20 ninth that I need to you'll see I have all my tasks up here that I need to get done my alerts, so I can come over to my reminders and see what I gotta do today or I can move this out to the 20 ninth. And you can see here's some call Scott tasks that I created. So I guess my point here is and you could do that at the opportunity level. You could do it at the contact level. You could do it at the customer level. So my point is you're absolutely losing out on the e-mail syncing capability. I don't want to diminish that, but I do want to highlight that it may just be a slight change to how you approach that workflow. Because realistically as a sales guy, I always want to create tasks reminding myself to check in with people anyway, right? And and so you've got that as.

SCOTT

1:07:16 To log like if you were to copy and paste it, what would you?

MICHAEL

1:07:22 Yeah, I'm going to hold on. I'm just copying random notes I have in a note pad from a prior call and I'm gonna pretend that John Smith is who I sent this to. So I'm literally right here where I'm gonna log a call... and, you know, I can say I could create e-mail sent. So I've already got that. There we go. I didn't even have to do the e-mail sent. I could have just log the note and it plugs it right into my history. So you can always do that, you know, and I could say it's open. I could say it's closed. I could set priorities. I could set it to future. I could say, I could change the subject to e-mail whatever it may be. So I can still just paste that right in there. So, you know, and so it's that's just an option. And then, you know, maybe, I log that e-mail and then I say, you know, what? I need a reminder to follow...

SCOTT

1:08:33 Up and I need to do that reminder on the 30.

MICHAEL

1:08:36 First and I wanna make that critical priority. And then I'm also going to add an event, you know, I have this meeting with you, Scott. So I'm gonna say what time is it? Two 30 to we'll say meet till four and I can put in my meeting notes.

MICHAEL

1:09:05 And... whatever it might be, and I can even add attendees of who was there. So I could keep tracking. That. Does that make sense? Yeah. Again, I don't want to diminish the fact that you're losing out on that e-mail sync capability because that is definitely a change. I'm just trying to highlight that you do have some, you know, alternative ways to keep track of what's going on, keep it on your radar and make sure nothing's slipping through the cracks.

SCOTT

1:09:38 Okay. All right. Yeah. I guess if you could send e-mail, me that quote or whatever. And then we can have a discussion tomorrow's Friday. Yeah, we should have time tomorrow to, and see.

MICHAEL

1:09:54 Okay. Danny, do you wanna plan that we follow up on Monday with these guys Monday afternoon. Does that make sense for you Scott?

SCOTT

1:10:04 Sure. Yeah.

DANIEL

1:10:05 Okay. I'll send a calendar invite. Does two 30 work? Same time? Three o'clock...

SCOTT

1:10:11 Better check my calendar. I don't think I don't have much on my.

DANIEL

1:10:16 Longer than.

SCOTT

1:10:16 I...

MICHAEL

1:10:18 I do that. You're like, I think I'm pretty clear on Monday and then you look and half the day is booked.

DANIEL

1:10:24 I've got my inlaws coming into town tonight. So I filled up my calendar for Friday and so.

SCOTT

1:10:30 Yeah, I'm open on Monday at this point, so.

DANIEL

1:10:34 Okay, great. I'll send out a calendar invite for me and Michael and if you can share that for else wants to come on Bruce mark, we'll go over that and, you know, I'll come prepared with final pricing and let you know where we stand, what we can do for you guys and talk about onboarding if you do go with service trade, what that window looks like. Because again, it's we have everything very structured. So I have to go back to my team and present this to them and tell them why I'm starting you on a specific date and then they'll take the charge from there.

SCOTT

1:11:03 Okay. Yeah. I guess as far as sending that quote, remove that time card thing.

DANIEL

1:11:07 Okay.

SCOTT

1:11:11 Perfect.

DANIEL

1:11:12 Sounds good. Scott. Well, I appreciate you, mark. I know Bruce had to jump off, but thank you guys so much. I appreciate it. And... yeah.

SCOTT

1:11:22 Okay.

MICHAEL

1:11:23 But I say, cool right now, I don't know. I don't know what it's like by Danny, but I know up here with us, it's...

SCOTT

1:11:28 It's warm has been for a while.

DANIEL

1:11:30 I'm in the office, I got a hoodie on. I had to go to my car and grab a hoodie because it's so cold and here.

MICHAEL

1:11:34 I've been taking this shirt off between meetings because it's too warm. So, well, thank you guys so much.

DANIEL

1:11:42 Yeah, I appreciate everything. I've got a meeting at four four, but thank you guys.

MICHAEL

1:11:46 Thanks guys.

DANIEL

1:11:47 Appreciate it. We'll talk soon on Monday bye.

The End