ServiceTrade Demo with Intelligent Design Mechanical Solutions

Brooke Caskey with Intelligent Design Mechanical Solutions
Recorded on 12/27/22 via Zoom, 1 hour 25 min.

Participants

ServiceTrade

Brooke Caskey
Territory Manager

Maribeth Steffen
Field Manager

Charlie Riddle
SDR

Other

Kaitlyn.Clow

12089573489

IDMS

Chase Hill

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Transcript

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

MARIBETH

0:00 Hey...

BROOKE

0:01 Can you hear me? Okay? At least?

MARIBETH

0:03 Sure.

BROOKE

0:04 Okay. Cool. Okay. They're in the waiting room.

MARIBETH

0:08 Okay.

BROOKE

0:09 I will let them...

12089573489

0:11 All right right now?

12089573489

0:16 Let's see.

BROOKE

0:37 Let me.

KAITLYN.CLOW

0:37 See, maybe it's in.

BROOKE

0:40 One, hey, Kaitlyn. Hi.

KAITLYN.CLOW

0:44 We're trying to figure out our Cameron here. Like we might have to sign off my.

BROOKE

0:59 Yeah. So, did you join on two... devices or is there because I see there's one that says Kate, and the one that says IDMS?

KAITLYN.CLOW

1:08 A BMS, maybe that's I joined on too?

BROOKE

1:12 Okay.

KAITLYN.CLOW

1:21 Speaker works?

KAITLYN.CLOW

1:38 Have a remove idea, just named one of them.

KAITLYN.CLOW

1:42 It's all right. Is it going to be an issue should be fine?

BROOKE

1:45 Yeah... yeah, we can see you guys just fine.

KAITLYN.CLOW

1:53 I...

KAITLYN.CLOW

1:53 Thanks for you. All right. Yeah, we can see the screen.

BROOKE

2:04 Perfect. Yep. And I haven't shared anything yet. So I'll let you know when I do, and we'll make sure that you can see it. So, are we waiting on anyone else on your side? I've got Chase Susan and Eric down as guests today.

KAITLYN.CLOW

2:17 We also have Katelin with us, so.

BROOKE

2:18 Kaitlyn. Okay, perfect. Well, we'll do a round of introductions too, but I just wanna make sure I have everyone on border. So Chase Susan, Eric and Kaitlyn, yes. Okay, cool. And then waiting for anyone else or are we good to get?

KAITLYN.CLOW

2:34 Good to go.

BROOKE

2:37 Well, the four of you thanks so much for joining us today. My name's I'm the territory manager here at service trade, and then with me, I have Maribeth Steven, she's my outside counterpart. She's based out of Denver, Colorado. I do wanna give a quick apology. I typically like to have my camera on and be face to face as well. But I'm having some internet trouble today for the, so, for the sake of service trade and our demonstration, I'm gonna stake camera off, but that said the sort a goal for today's, meeting is to walkthrough service trade really to determine if this is going to be a good fit for your business goals.

--- *Purchase decision* ---

BROOKE

3:09 And so, first, Maribeth and I are gonna wanna cover those with you, maybe talk through your current processes where you might see some room for improvement. And from there, we'll take a look at the software. Should we look like a good fit for each other? We can discuss next steps towards the end of that. Sounds like a good plan.

--- *Purchase decision ends* ---

KAITLYN.CLOW

3:25 Good, great. Thank you.

BROOKE

3:26 So, in order to get started, I figured we might go around the room and maybe you could introduce yourselves maybe with your title and something that you're excited to see when it comes to looking at software for the service department.

KAITLYN.CLOW

3:42 Okay. Start.

KAITLYN.CLOW

3:44 Sure. My name is katewyn and I'm looking forward to maybe something that will be more well versed where we don't have to... use different... software for like over time and travel, something that just kinda combine everything into one?

BROOKE

4:04 Okay. So time tracking? Yeah, perfect. Great. Anything else that you're really excited to see Calan?

KAITLYN.CLOW

4:14 The room for improvement from your software?

BROOKE

4:17 Okay, perfect. And why don't we just go around the table?

KAITLYN.CLOW

4:23 Okay. I'm Chase hill, I'm the service for man. I'm looking forward to seeing something that's gonna work more for our needs.

--- Type of work ---

KAITLYN.CLOW

4:30 Sounds like what we're using now is much more residential oriented. We do a lot more commercial and industrial than anything.

BROOKE

4:38 Okay. Something meant for commercial industrial, so we can dive into that a bit more later, but that's good to know.

KAITLYN.CLOW

4:46 I'm Susan, Paul, I'm an office assistant. I'm looking forward to... having a software that's... more up to date than what we have. Ours is kinda antiquated and it's very limited.

--- Accounting integrations ---

BROOKE

5:02 Okay. We're up to date.

KAITLYN.CLOW

5:03 Yeah.

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5:05 Eric... I just...

KAITLYN.CLOW

5:08 Want to find something that we've been using FieldEdge for a while and it's just, I think something that's a little more robust for what our needs are, like what Chase was saying would be good that links to Quickbooks, better Quickbooks online, you know, just flows better rather than it being clunky would be good for us.

--- Accounting integrations ends ---

BROOKE

5:26 Perfect. Eric, what was your role?

KAITLYN.CLOW

5:29 The owner?

BROOKE

5:33 And then Kaitlyn, I think I missed your role too. I'm sorry.

KAITLYN.CLOW

5:37 Admin?

BROOKE

5:38 Admin. Okay. Perfect. Cool. Well, all that stuff we can definitely cover today. So just to give a quick background about what I know about you guys already. And then, you know, if there's any more context, of course, we'd love to hear it, but sounds like you guys are at 12 text 100 percent commercial industrial.

--- *Type of work* ---

BROOKE

5:57 Sounds like most of your work is maintenance and service. I was curious if you had an exact breakdown maybe of your service maintenance work versus any installer Construction you might do if you do any.

KAITLYN.CLOW

6:09 It's probably 70 30 service and maintenance to the install side 60 40.

KAITLYN.CLOW

6:15 And we do a small amount of residential where not 100 percent commercial.

BROOKE

6:20 Gotcha. Okay. What's the correct percentage on the commercial? Would you say?

KAITLYN.CLOW

6:26 It's probably 85 percent commercial. Yeah, easy.

BROOKE

6:31 Perfect. Yeah, we can totally handle something like that.

KAITLYN.CLOW

6:33 We're a commercial union company. So it's hard for us to compete in the residential new Construction. So we do change out in a little bit of maintenance to service calls.

BROOKE

6:44 Gotcha. So it sounds like your install jobs might be shorter term to.

KAITLYN.CLOW

6:48 Exactly.

BROOKE

6:49 Okay, great. That's exactly what we're designed to track too. So so far, everything's matching up pretty well. And then I guess we know that you guys use FieldEdge. So, how long have you been with them?

--- *Purchase decision* ---

KAITLYN.CLOW

7:03 For two or three years? Yeah. Going on three years, I think, yeah.

BROOKE

7:08 Okay. So FieldEdge for three years, and were you all part of that evaluation when you selected FieldEdge?

KAITLYN.CLOW

7:16 What evaluation? No, it was, our office manager is no longer with us.

BROOKE

7:20 Different team?

KAITLYN.CLOW

7:21 Okay.

BROOKE

7:22 Yeah. The reason I ask, cause I was just sort of curious what went into that evaluation and what went into that decision making and maybe what's what was important to them.

--- *Invoicing* ---

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7:31 Just trying to find.

KAITLYN.CLOW

7:33 Link to Quickbooks was the biggest thing that made it easy.

BROOKE

7:37 And you said Quickbooks online?

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7:39 Yeah. Well, we have.

KAITLYN.CLOW

7:40 Quickbooks as top right now, but we would probably, I think we're gonna switch over to online.

KAITLYN.CLOW

7:44 Some point here?

BROOKE

7:46 Yeah, cool. Service trade is able to connect with both.

--- *Accounting integrations* ---

BROOKE

7:50 And so, yeah, no rush on switching, but just know that when you do, we're totally capable of connecting to online too.

KAITLYN.CLOW

7:58 It's great.

BROOKE

7:59 So, it sounds like with FieldEdge right now, there might, you know, be some gaps in the system? It sounds like their system being rooted and residential has definitely revealed itself as a problem.

--- *Paper process* ---

BROOKE

8:11 Are there, can you walk me through maybe where, you know, the most headaches are using FieldEdge. I know that might be a wide question.

KAITLYN.CLOW

8:21 For me, it's such a manual process. So, right now, our techs will log in if they don't log in correctly or the apps not working, it's turns into a manual process.

--- *Tech On-site* ---

KAITLYN.CLOW

8:33 And also, if a tech is in a work order working, we can't access that work order to add materials or build the invoice or whatever locks this out?

BROOKE

8:46 Is that just how the system is built? Or is that?

KAITLYN.CLOW

8:49 That's the way this is, does?

KAITLYN.CLOW

8:51 Yeah.

KAITLYN.CLOW

8:54 It is because sometimes they'll be in a job for eight hours and it's hard for the office to do anything in that job if they're on the clock, you know, all day.

--- Tech On-site ends ---

BROOKE

9:02 Yeah.

KAITLYN.CLOW

9:03 Can you log out so that we can do our thing? And then it throws the time off and it goes back to even more manual work being created.

BROOKE

9:12 Sure. So, I mean, what if a technician needs, I don't know a photo or something uploaded to the job, then there's this whole rat race of them need to log out and you logging in, is that right?

--- Access to information ---

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9:22 They can upload?

KAITLYN.CLOW

9:23 In the field, but if they're on the app working in working mode or clocked into it at all the office or no one else can do anything with that specific work order?

BROOKE

9:35 Okay. Okay. Gotcha.

KAITLYN.CLOW

9:38 Technician in the field.

BROOKE

9:41 Okay. I can definitely see how that would be an issue. Let me see what else Charlie said doesn't go through. Yeah, he mentioned that actually.

--- Tech time tracking ---

KAITLYN.CLOW

9:52 Did you mention the overtime concern? That's ridiculous in my opinion? Nowadays, it's like the fact that it doesn't track over time. I mean, it just tracks everything as ours. So the office has to go in and say, no, this guys work, you know, we're union. So anything over eight is over time. So if they have a 10 hour day, they have to make sure they catch those other two hours and implement it into that job. So the customers Bill and the technicians paid over time... a lot of extra steps in my opinion.

KAITLYN.CLOW

10:23 And then we also have to track travel. If there's any travel in there and how that... goes into their daily hours? How much is over time? If?

--- Access to information ---

BROOKE

10:32 Travel? Okay. Yeah, we'll be able to touch on some time tracking today too. And then what about getting important information to the technicians? Like maybe be history for the equipment they're working on. Is that something they have? Because FieldEdge, is it a mobile app or is it a web browser?

KAITLYN.CLOW

10:50 It's a, there's a mobile app and a.

KAITLYN.CLOW

10:52 Yeah. There's both technicians have the mobile app on their end on their phones.

BROOKE

10:59 Okay. And are they given information like equipment history on their app or?

KAITLYN.CLOW

11:04 The only way they can access history, we can add equipment for each customer so that any time they work on that they can view the, they can go view them one at a time.

--- Assets ---

KAITLYN.CLOW

11:13 Click on to say rooftop unit one, open it up. Look at it. We'll tell you filter sizes. But in order for them to view the history, they have to go through the work order records and literally read everything that's been added up to date into that customer, it's kind of.

--- Tech On-site ---

KAITLYN.CLOW

11:33 Once that work order is completed, then it is removed from their board. So they don't have access.

KAITLYN.CLOW

11:38 Yeah, that's kind of a downfall too. Once they completed the work order, say they didn't add invoice or a truck stock form or something. They now can no longer add it without being in working mode.

--- Access to information ---

KAITLYN.CLOW

11:50 If you're not in working mode, if you're in travel or it's impending or anything else, it won't let you do anything on the work order itself.

BROOKE

11:58 Okay. So.

KAITLYN.CLOW

11:59 The admin side can, but the mobile app will not allow them to do that.

BROOKE

12:03 Okay. So if a technician accidentally closes out of work order too soon, it's sort of a it's cumbersome to.

--- Tech On-site ---

KAITLYN.CLOW

12:10 Yeah. Yeah. So it's definitely all got to be real time tracking. They have to scan everything as the day goes on or it becomes just more work for the office and themselves.

BROOKE

12:20 Yep. Okay. Yeah. And in service trade... not only is it real time communication in the office and the technicians can make Progress at the same time on the same open work order. Yeah. When a technician completes the work order, it falls into a completed tab for them. So if they need to, they can still reference it from their mobile app and even, you know, go in and start doing more work on that job if needed.

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12:45 Great.

KAITLYN.CLOW

12:47 Is there a way? I'm sorry, is there a way to kind of limit what they can do on the app?

--- Access to information ---

BROOKE

12:55 Okay. Yeah, depending on exactly what you mean by that, yes, service rates are very permission setting or permissions based platform. And so as we, when we get to the real demo, interrupt me when you have a question about that, I'll tell you, is there something specific you can think of now?

--- Invoicing ---

KAITLYN.CLOW

13:16 So when we send out an invoice, email it to a customer, we finalize it so that's once it's finalized, you can't do anything to it. Well, I mean, we can in the office but not in the field. So we don't want text finalizing... invoices in the field.

BROOKE

13:36 Yeah, something like that. Even the ability to send out invoices in general is completely permissions based.

--- Deficiencies ---

KAITLYN.CLOW

13:42 Right.

BROOKE

13:42 But, yeah, question for you all... what happens in the field? Because you guys do a lot of preventative maintenance, right? What happens when perhaps your technicians are out for a maintenance visit and they find an issue with the equipment that you would then need to quote out what's the current process for sending a quote out to the customer?

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

KAITLYN.CLOW

14:06 They will usually check if it's a small quote, they'll check price and availability themselves, and kinda report that information to the office and we will prepare a quote through FieldEdge. And then invoice it first send an email to the customer, unless they want it, you know, print it off an actual physical copy.

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

BROOKE

14:26 So, but the technician for the most part is gathering the information and then how do they get it to you in the office? Is that just something they log in FieldEdge? Or are they like giving you a call or an email?

KAITLYN.CLOW

14:36 It's a call or email or text just verbally usually?

--- Deficiencies ---

BROOKE

14:40 Okay. And then you all are building the quote in the office and sending it?

KAITLYN.CLOW

14:43 Yeah. A lot of extra steps.

BROOKE

14:46 Okay. Gotcha. And let's say a technician finds a problem this morning? What would your best guess be for how long it takes you to get a quote sent out?

--- Purchase decision ---

KAITLYN.CLOW

14:57 A couple of hours at a minimum. Usually, unless it's high priority, we can stop what we're doing and get it done. But as busy as we are this time of year that's hard to do.

BROOKE

15:07 Yeah, I would imagine. Well, cool. We'll definitely walkthrough that. So, let's see anything else top of mind?

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15:17 For you all?

BROOKE

15:19 You know, any other headaches that field that just causing that you're hoping service trade will help solve before we get started.

KAITLYN.CLOW

15:28 Now.

KAITLYN.CLOW

15:29 Think it's just a flow more than anything.

BROOKE

15:30 Yeah, cool. And now, is this something where you guys are actively, you know, looking for a software solution ready to make a change, maybe come the new year?

KAITLYN.CLOW

15:42 Yeah. Or is...

BROOKE

15:45 So, what sort of timeline have you painted for yourselves? Once you find the right match, do you have a...

KAITLYN.CLOW

15:50 It...

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15:51 Just depends.

KAITLYN.CLOW

15:51 On like how long, like the whole thing will take and how we feel about the software, I guess. And then, you know, so I think, yeah, I don't know. I mean, I just think we need to just dive into it and see what it is.

KAITLYN.CLOW

16:05 Yeah.

KAITLYN.CLOW

16:06 Basically FieldEdge, we've been open going on for going on five years now since Eric started Intelligent design. FieldEdge is really the only thing we have tried.

BROOKE

16:16 Okay. Gotcha. Well dependent on, you know, your thoughts and if we seem like a good match for each other, we can dive into some of sort of like the implementation timeline just so you have some background context on it, but we'll save that for the end of course.

--- Accounting integrations ---

BROOKE

16:34 And then seeing as FieldEdge is the only system that you've used in the past, it sounds like four years. Are you looking at other systems too?

KAITLYN.CLOW

16:43 Yeah. Another one.

BROOKE

16:46 Thanks. Which one did you look?

KAITLYN.CLOW

16:48 BuildOps? I believe, yeah, you know about.

BROOKE

16:51 What do you think?

MARIBETH

16:56 Are your impressions on build apps?

--- *Purchase decision* ---

KAITLYN.CLOW

16:58 It looked pretty good. I mean it was from what, when we talked with them, it was some of the stuff that they did, it looked pretty look better in video, put it bluntly.

BROOKE

17:13 Cool. Well, let's go ahead and get started. And... throughout this, please don't be polite, interrupt me whenever you need to. Okay?

--- *Purchase decision ends* ---

KAITLYN.CLOW

17:23 Thank you.

BROOKE

17:24 So I'm gonna go ahead and share my screen and I was telling Maribeth earlier that I think I told you guys too that I am having some connectivity issues. So if I'm stalling it all interrupt me for that too, but I think I'm good to go. Alright. So let me know. Let me move our pictures too. Can you guys see my screen where I have my slide show showing? So we talk. Okay, perfect. At least I did that, right? So quick background information on service trade before we get started. So service trade, we got our start 10 years ago. Now recently we celebrated our tenth birthday, and that same week actually we gained our 1,000 customer. So that was really exciting for us.

But for the last decade, we've been exclusively focused on the commercial service and light industrial service market. And the reason that service trade was built in the first place is because our CEO, Billy marshal... he came from a kitchen exhaust cleaning company called done well. And in his work, he noticed that there is somewhat of a gap in the system when it comes to commercial service contractors, your customers and your customers really grasping and understanding the great amount of work and effort that you put in for them on a day to day basis. So this in mind, Billy want to build a system that not only would streamline processes internally, but would also allow you to put your better foot forward to your customer and press them and in turn grow your service business.

KAITLYN.CLOW

18:54 Great.

BROOKE

18:54 So, we are big fans of data here.

--- Pricing ---

BROOKE

18:58 And according to our recent numbers, service trade, customers grow at an average rate of 25 percent annually. So that's our average across our 1,000 or so customers across the board, top performing customers, of course, grow at rates as high as, you know, 35 to 40 percent annually.

--- Customer engagement ---

BROOKE

19:14 And of course, with those customers, we're always gonna look at that, look at their data and find out, hey, what do we attribute to that level of success using service trade? And we found that there's three main ways that we're helping our customers. So the first way is through operational efficiency.

--- Customer engagement ends ---

BROOKE

19:31 Of course, in order for any business to achieve this, it starts with the Foundation that you use to run your day to day business. Part of this is making the most of your, out of your current resources. It sounds like right now you're at 12 technicians, are you guys, you know, actively hiring planning to grow that tech count?

--- Customer engagement ---

KAITLYN.CLOW

19:47 We're planning to grow it yeah.

BROOKE

19:50 Yep. So the thought here is that even as you are, you know, interviewing hiring, planning to grow, we still wanna make the most of the current team of technicians you have. So giving them the right resources in the field. A great example of this is equipment history, the ability to click on a piece of equipment and easily narrow down all the past history context for what was done, deficiencies found before, you know, or, you know, streamline scheduling in, you know, in the sense where you can schedule in a way that makes geographical sense, reduce when she time just eliminating little redundancies like that to sort of maximize most of your current resources. And then we also want to help you keep track or keep tracking and enhance relationships you have with your customers. Not to say you're not doing a good job with them already. But I found that it's really easy for your industry to have a very transactional relationship with your customers. You know, maybe there's communication when something's broken or when it bills do. And so our thought process is to give you the tools to, you know, put your name in front of them in a better light. So things like a customer portal for them to log in to see their own information, pay invoices, look at their own asset, you know, history, upcoming jobs, things like that or an end route notification from your technician indicating their arrival time with their picture. So your customer has peace of mind that someone is on the way for a detailed post service report outlining what was done on site, pictures, videos, audio memos, so that they know where their research are going when it's time for them to pay their Bill. And then finally we have deficiencies. So when I use the term deficiency today, I'm referring to any sort of repair opportunity in the field that may be something that was found that would then need to be sent to the office and a quote sent out to the customer. And we find that deficiencies in service trade are a huge deal because this is your easiest way at achieving, you know, additional pull through revenue based on the work you already have. So we wanna close the gap from, you know, technicians finding the issue, sending it back to the office. A quote is built based on the issue and then quote sent out to the customer and then easily approved. And we'll walkthrough that workflow today too. And just to give you a quick idea of the numbers you might achieve using best practices with service trade at 12 technicians.

--- Pricing ---

BROOKE

22:09 If we're able to help you capture one additional job from pull through work a week. I used 500 dollars as a conservative number for a service job, 35 percent margin here's. Just a quick preview of some of the numbers that our customers are achieving.

BROOKE

22:28 Perfect. Now, so far, does it sound like the overall workflow and outline of service trade would align well with your software goals?

--- Access to information ---

KAITLYN.CLOW

22:39 Yeah.

BROOKE

22:43 Cool. All right. So, let's get into the demo here and we're gonna start in the office, do some of the background admin view, and then we'll actually jump out into the field and play the role the tech together as well. And so, can you all see where it says service dashboard here?

--- Access to information ends ---

KAITLYN.CLOW

23:00 Yeah.

BROOKE

23:02 Perfect. Okay. So starting here on the dashboard, I typically like to start here just from an admin perspective. When you start or when you log into service trade, your landing page is your dashboard and it's gonna show you things like your daily schedule a, the technicians, where they're going Progress of completion. From there, you're going to have a check and balance system on the dashboard. So the ability to see the fact that you've got overdue jobs about appointments. You've got a few jobs do in two weeks without appointments as well. This allows us to be proactive on scheduling, avoid anything slipping through the cracks. Of course... down below you'll see it says past jobs to be marked complete. So this indicates the technician has done their work in the field. They've marked as touch but checks and balances, we're going to have the office review as well. You'll note that some of these jobs are flagged here. So a flagged job indicates that a deficiency was found. So perhaps as a visual queue, you might see the three flagged jobs and think to yourself. Okay. Hey, here's, three opportunities for pull through revenue. Let's make sure we have our quote sent out already, parts ordered, whatever we need to do to win that work. Okay? And then down below, we have completed jobs to be invoiced. I doubt you'll ever have as many as I do here. But even so we want to help you keep track of your billing opportunities. So you do have the option to invoice a job directly right? When you press complete, but say it's not ready.

--- Tech On-site ---

BROOKE

24:24 We're gonna store them here for you to great... and service trade does track time. We have a few methods of doing so, but we'll track your technicians, clock events so we can track them when they're driving to a job site, when they're on a job site, and even when they're prepping for a job site, and we can talk about some of that later.

--- Customer engagement ---

BROOKE

24:42 But there's a quick preview of it here. Okay. That's so the dashboard here is quite high level and there's a deeper way to dive into all of this helpful information, run reports and whatnot. But is there anything here that is standing out to you that maybe you don't have easy visibility to now?

--- Customer engagement ends ---

25:04 How is it listed?

KAITLYN.CLOW

25:05 Like, how are all these jobs? Like, is it you can filter in all kinds of different ways or like can you look at like the invoices or is it like work orders or is that what we're looking at now or what rhyme or reason are they laid out the way they are?

BROOKE

25:21 On the dashboard here?

KAITLYN.CLOW

25:22 Yeah.

BROOKE

25:23 So to answer your question, there's a 1,000,000 ways you can filter the jobs in the dashboard by whatever you need to see. But this here is the purpose of this is just to give you a good glimpse of the day at hand and what the most primary tasks are. So having something like that you got over do jobs or jobs do soon, we probably want to act on that quickly. Same with completed jobs with flagged deficiencies we want to act on that quickly as well. And completed jobs ready to be.

KAITLYN.CLOW

25:50 Is...

KAITLYN.CLOW

25:52 It, we're quarter based?

BROOKE

25:55 Yes.

--- *Recurring maintenance* ---

BROOKE

25:57 Okay. Yep. Cool. So over here, we have our pretend customer for today. So we're going to be working at I hop and to give you guys sort of a background of how each customer data is stored, services are set up. I put Jason as our contact. And then at this specific I hop, we do the following services for them. So I should back up and I should mentioned that service trade being rooted in commercial service, we're really great at handling scenarios where you're servicing a company with multiple locations. So something like an I hop, you can have your main company headquarters and then as many addresses under that headquarters with their individual contacts management. Just so everything the Bill to ship to are really easy to keep track of. Great. Yep. So this is just one IP location in Washington, I think. But so we do the following services for them. So it looks like we have something quarterly on the refrigeration system quarterly, H vac, you get the idea if I click into these, you can get a good idea of how these are set up.

--- Quote templates ---

BROOKE

27:00 So each service you'll tie it to an asset in service trade terms, your asset is your customers equipment that you service and work on whether that's a one time service or recurring. So you'll tie it to your asset. And then you can upload templates during your implementation period, where say you have a service template for something like this, you've got your description part, learn items all ready to go.

--- Recurring maintenance ---

BROOKE

27:21 You can even set up preferred technicians, estimated price duration. And then of course, the most important part is how often does this need to reoccur and think of this as a set and forget. So you tell the system this one time and service rates really great at keeping track of this from here on out for you. Okay? Yep, click to the right here. You can even see that the months where services do populate blue?

KAITLYN.CLOW

27:43 We were to create a new maintenance. This is how we would set it up to keep reoccurring those work orders. Yes. Okay.

KAITLYN.CLOW

27:53 That looks a lot easier than.

KAITLYN.CLOW

27:55 We have to create...

KAITLYN.CLOW

27:56 An item and then attach it to the customer.

BROOKE

28:01 Crazy. Well, not cool. I'm glad that it looks like an improvement was what I mean?

MARIBETH

28:11 Okay.

BROOKE

28:13 Great. And we'll talk about this a little bit more in a second. I'll show you guys how you can run a really helpful report to even forecast what's up ahead with these two.

KAITLYN.CLOW

28:21 Okay.

12089573489

28:22 So...

KAITLYN.CLOW

28:23 Some customers, sorry to interrupt you where like say we have some restaurants where we'll do the quarterly, you know, rooftop maintenance on their rooftop units, and they will also do like a BI annual kitchen equipment maintenance. How would I put that in there? In terms of that? Where it would pop up? You know, would I have to do two separate maintenances basically for the same customer? One that pops up twice a year? One that pops up four times a year or... go ahead?

BROOKE

28:51 So, is it on the same equipment or different equipment?

--- *Assets* ---

KAITLYN.CLOW

28:55 Would be different equipment, some of his kitchen equipment, you know, ice machine, stuff like that on the inside of the kitchen. And then we have one where we do the outdoor equipment.

BROOKE

29:05 So really easy. So down here, you'll also track your customers equipment, so you can have all the equipment that you service under assets, of course.

--- *Recurring maintenance* ---

BROOKE

29:16 And then when you're setting up the services again, part of it is setting up how often it re, occurs. And so, you know, maybe for one piece, you have a quarterly, maybe for another piece, you have a semi annual that's no problem.

KAITLYN.CLOW

29:27 Okay.

BROOKE

29:28 Yeah. So it's just dependent on how you set it up. Does that make sense? Yeah.

--- *Assets* ---

KAITLYN.CLOW

29:31 It's easy enough. Thank you.

BROOKE

29:34 Yeah, no problem. And then also on here, we're going to keep track of your job history and chronological order. Always have hyperlinks attached to the jobs in case the customer calls with the question, really easy to access. And then here is your customers appointment. So today, we're working on our hvac unit and I was proactive and I already set up our job for us, but let's say that I had it and I was trying to figure out, hey, who's the best to detect for this job? I can click into my individual asset from an office perspective by the way. And I can see things like past job history for this specific piece of equipment, maybe any deficiencies found. And this kinda gives me more context as an admin viewer. Hey, does this break often, who typically works on this? Who's the best suited tech for this job, right? I have all this helpful information here.

BROOKE

30:30 Are you guys tracking assets in this level of detail and FieldEdge right now? I wasn't sure.

KAITLYN.CLOW

30:37 No, they're much more work order based or customer based. If you want to go view like equipment, you have to actually go into that customer and go to their equipment inventory that the guys or the office have added. Then you can view it, but it's not, so it's nothing like this where it's much more based off the equipment, your service and looks like much many more options.

BROOKE

31:01 Okay. Ours.

KAITLYN.CLOW

31:02 Just basically shows a list of equipment attached to that customer.

KAITLYN.CLOW

31:06 Yep.

BROOKE

31:07 Okay. Okay. Gotcha. Where this in your eyes is a little bit more tailored to, hey, like here's the services that we performed on this. And here's how this is, you know, set up.

--- Paper process ---

KAITLYN.CLOW

31:19 Exactly. Like sometimes I literally have to verbally communicate to the technician. Now, this is the maintenance for this, not this.

BROOKE

31:27 Gotcha.

KAITLYN.CLOW

31:27 It's just, yeah.

KAITLYN.CLOW

31:29 Because right now, it's just work order based. So, in order to find all that information, you have to open up all those work orders or the invoices that are attached.

--- Quoting ---

BROOKE

31:39 Okay. Okay.

KAITLYN.CLOW

31:40 Really, you can't really run a report by customer of what was done.

BROOKE

31:44 Okay. Gotcha. Yeah, there's all sorts of really neat reporting tools and service trade too. And we'll look at one in just a second here, but just to wrap up the location page, then of course, you know, any efficiency or quoting history we're gonna keep track of.

--- Assets ---

BROOKE

32:01 And then small details that you might not think about every day, but that go a long way like the ability to leave a recurring comment with, you know, the door code or where to park, who to talk to, things like that, save the technicians calling back and forth to the office, you know, wasting the phone time or the ability to add a recurring attachment, like a site map, equipment manual, anything for their context working with that customer and yours for that matter?

--- Recurring maintenance ---

KAITLYN.CLOW

32:25 All right.

BROOKE

32:28 Any questions here on the location page?

KAITLYN.CLOW

32:31 I don't think so.

KAITLYN.CLOW

32:32 No, I think you covered it. Thank you.

BROOKE

32:34 Of course. So keep these services in mind as we go to this next step here. So this next step is called service opportunities. And this is an example of one of the reports you can run in service trade. This is helpful to you because it allows you to forecast what's ahead when it comes to your services, whether they're one time or recurring. And it also allows you to run any overview reports in case you accidentally let something fall through the cracks. And so here I have my report where I'm saying service trade show me my recurring services due in two months because that is how far I like to schedule in advance. So if I click on these, I can see that in February at capital one arena, I have the following service to, so it looks like some sort of hvac service, right? It's also gonna pull in my description parts, we run items, my preferred technicians and these are essentially work orders ready to go, ready to be created. So all I have to do is indicate the job type here. And I'm going to create a work order. So let's say you run your report of your jobs, do in the next two months, they're all recurring services, you know, they're all PMS. In theory, you could click this checkbox up here and you could create 38 jobs at once.

--- *Dispatch* ---

KAITLYN.CLOW

33:45 Awesome.

BROOKE

33:46 I'm gonna save some for my other friends here. So I'm gonna create a few. But here I am creating five jobs. And now these jobs are then transferred over onto our map based scheduler. I'm zoomed in North Carolina right now, but you'd obviously be zoomed into your area of service. And the pins you see on the map represent jobs that have been created. So if I click on this, I can see it's a plan maintenance at party hospital. And in order to let's say assign and schedule this, you'll have your technicians on the left. You'll see their color coded so that, you know, you can set up your map in a way that makes geographical sense, reduce windshield time, don't have anyone crossing over time for no reason to. And all you need to do is click see what kind of job it is and then drag it to the best suited technicians. So in this case, I'll say Tim is the best suited. And then we'll say that Tim's gonna go this Friday and then you'll see it gains a little calendar picture indicating that it's been assigned and scheduled. So say you're running reports on that map. If there's a preferred technician preset, the map is smart enough to recognize that and pre assign a color to in case there's anyone that's set that's been said like, hey, you know, Brooke is the right one for this job. It'll just automatically turn tease.

KAITLYN.CLOW

35:00 Great.

BROOKE

35:01 So, again service call will take that one over to Tim as well since he's in a similar area. And then we'll send him on Friday to... how does that compare to how you're currently maybe forecasting through your upcoming PMS and then getting them scheduled out?

KAITLYN.CLOW

35:21 That's a way easier.

--- Recurring maintenance ---

KAITLYN.CLOW

35:23 I mean, these ladies know more than me, but basically our filter, when we get a new maintenance, I will go over the frequency with our filter provider, our filter, whole seller. They'll send us, you know, mid month a list of what they think is popping up in the following month.

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

KAITLYN.CLOW

35:37 Well, obviously, you know, go through that as well and compare on our end. And then we have to create a work order for each one of those even if it's a reoccurring one in order to get a po created to send them a purchase order for them. So it's a lot more.

--- Dispatch ---

KAITLYN.CLOW

35:54 We have a maintenance even when we know it's do it'll populate, but you still have to go into it. Click it. Basically it'll sit on unassigned until we assign it to a certain technician. They're gonna go. It doesn't you know, you can do preferred or primary text... but it doesn't self populate anything.

--- Access to information ---

BROOKE

36:15 Okay.

KAITLYN.CLOW

36:16 You have to go in and basically manually accept it or skip it for each customer.

BROOKE

36:24 Okay. I could see how that could be time consuming too.

KAITLYN.CLOW

36:28 Yeah.

BROOKE

36:28 Yep. And by the way, when you attach these jobs to a technician, it immediately dispatches to them and sends them a work order to their mobile app and we'll go out to the mobile view in just a second here.

--- Access to information ends ---

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36:40 How far?

KAITLYN.CLOW

36:40 In advance will do that? Like you scheduled one a few days in advance? Would I send it to him right then or would I send it to him that morning?

BROOKE

36:49 So, I think it's Maribeth if you know this for sure, I think it's three days. I have to retest it. That would have to retest it, but I think it's three days.

--- Quote templates ---

KAITLYN.CLOW

37:01 Okay. Thank you.

BROOKE

37:04 Yeah. So what I did for us today is I went ahead and I set us up a PM job. I noticed that I had my hvac unit doe at my I hop customer. And so I went ahead and scheduled that here. And again, since this was part of my recurring service that was preset information like my description, parts, labor items, essentially everything I need to know about this job.

--- Access to information ---

BROOKE

37:24 And working with this customer pulled over from me automatically. There was no double data entry is literally just a matter of me saying it was due and scheduling a good date and time. You also have your parts on the job of course, too. And then since service trade is a cloud based platform as we go in, start making Progress from attack view, clock me in clocking out, reporting any sort of efficiencies, maybe taking pictures, filling out paperwork, leaving notes, whatever we need to do everything the technician does relay back to the office in real time.

--- Access to information ends ---

BROOKE

37:54 And this helps you take the best next step as needed for the context of the job, right? And then as we mentioned earlier, if you're needing to make any edits on your side, that's completely fine, you can do that while the technicians working to.

KAITLYN.CLOW

38:09 Great.

KAITLYN.CLOW

38:09 Speaking of edits, how do time edits work or... go ahead.

--- Tech time tracking ---

KAITLYN.CLOW

38:18 So right now, if a tech clocks in and they don't have a work order, clocks them into idle. And then I'll go in later and correct that idle and move it over to a work order. Okay? It's a very manual.

KAITLYN.CLOW

38:33 Accidentally stay clocked in, you know, make honest mistakes. I guess in that is what's the best way to edit that in the office.

--- Access to information ---

BROOKE

38:42 Yeah. So I think that'll be easier for me to answer when we go to tech, so I can show you how this work. And then when we come back, I can show you how to do that too.

KAITLYN.CLOW

38:52 Great. Thank you.

BROOKE

38:54 Okay. So.

KAITLYN.CLOW

38:54 Me switch.

BROOKE

38:55 My screen here because we're gonna go out to the tech few now.

KAITLYN.CLOW

39:02 Right. I'm in mass today.

BROOKE

39:06 Let me know and you can see it's gonna say I hop my appointments right up here.

KAITLYN.CLOW

39:13 I...

MARIBETH

39:16 Can see.

KAITLYN.CLOW

39:17 Yeah, we can see.

BROOKE

39:18 It perfect. Okay. So now we're on the mobile view of service trade. So this is an app that your technicians log into. We're friendly with iOS and android phone or tablet that's completely your preference. But when your technicians log into service trade, the first thing that they're going to see is their appointments for the day. And then I always like to keep mind filtered by the day too. They can toggle this and see every work order assigned to them.

--- Dispatch ---

BROOKE

39:41 But for their sanity, I like this button and then they can see unscheduled jobs assigned directly to them, maybe something with the flexible due date and then completed job. So any work that they've completed in the past if they need to reference it, no problem. It's gonna be listed here of course, if it'll load for me, but we'll go back over there. We go.

--- Access to information ---

KAITLYN.CLOW

40:00 Nice... list of jobs on the have a list, everything you know, so we could put it on there, assign it to them. And then they'd have stuff they can pick through that's nice.

BROOKE

40:10 Yep. Yep. So focusing here on my I hop job. So here is my mobile work order.

--- Tech On-site ---

BROOKE

40:19 So the purpose of this work order is it should be really intuitive resourceful for your technicians and it should give them the context they need to be successful at the site with this customer, right? So first thing I'll note down here are those clock events. So we've got on site and route and job prep. Now, something to note about the service red clock events is that when a technicians clocks in on any of these three items, it's gonna take a snapshot of their location. So you can see maybe if they're clocking in on site, but they're still eating lunch 10 Miles away. So you'll be able to see that information. So in route here is where you can click and you can send a notification to your customer indicating your arrival time. So Chase, I'll send you a quick example of that. And this might seem like a smaller gesture. But in terms of customer feedback, we've gotten, you know.

--- Customer engagement ---

KAITLYN.CLOW

41:07 Really positive.

BROOKE

41:08 Thoughts on this just because this day and age, think about Amazon, Uber, dominos pizza. They're sort of an expectation for laying out the status of the service and so being able to let your customer know that the tech is on the way is it goes a long way?

--- Paper process ---

KAITLYN.CLOW

41:22 It's great. Saves a phone call from the office, you know, or tags or whatever it be. So anything that saves time and makes these ladies job easier?

BROOKE

41:30 Yeah, absolutely. And they can even track their drive time too. I think you mentioned that might be something that you guys are tracking. So I'll say.

--- Tech time tracking ---

KAITLYN.CLOW

41:38 To being a union company, they're paid differently for travel. Doesn't go towards our over time.

BROOKE

41:46 Yep makes sense. So we'll go, we'll clock out in route and you'll see it prompts me to clock in on site now. And now it's actively tracking my on the job time. So now that I'm clocked in, I'm gonna go up here to services... and I'm gonna see what I'm here to do today.

--- Quote templates ---

BROOKE

42:01 So keep in mind the description for today's, meeting is just pretend you'll have your own description here. Things like this, like duration and price or optional to show to the technicians. I just happen to have it turned on.

--- Assets ---

BROOKE

42:12 But more importantly, your technician is given some context on what they're here to do today. And next they can go down to assets, take a look at the piece of equipment that this work order is tied to and maybe familiarize themselves with, you know, the service history or if anything, make sure make model, see number are all up to date, but they can go up here, service history and here's every job performed on this specific piece of equipment. So this isn't location.

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42:40 Listed?

BROOKE

42:41 It's the specific unit?

KAITLYN.CLOW

42:44 Great.

KAITLYN.CLOW

42:46 Is the equipment, is the equipment list added through the office? Or is that something text could?

BROOKE

42:54 Both. So when you first onboard with service trade will bulk upload your assets for you to get everything in the system, but moving forward technicians and office users can add new assets to.

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

KAITLYN.CLOW

43:07 Great. Yeah.

BROOKE

43:14 And so, I guess like right now in terms of equipment checklist, maintenance checklist, how are those being completed? Are those being completed within FieldEdge, or are they separate from that platform?

KAITLYN.CLOW

43:26 Basically, what they're doing is they'll just make work order notes and that ends up being exactly what the customer sees when the invoice is sent over.

--- Tech On-site ---

KAITLYN.CLOW

43:36 Even their misspellings... if it's not changed by us. You know, obviously we do peer review and we review every invoice. So we catch that stuff 99 out of 100 times. But... so, yeah, just whatever they type in is what we have to go off of. It, tracks their time. It'll have a traveling. If they're travelling usually more than hour or not. We'll have them clock in to travel. If it's pretty local. We'll just have clock into working to track their time. And then they can make a tag which can be return trip needed, you know, waiting on parts return trip, needed, work in Progress or ready to invoice those tags or what the office really relies on to know the true status of the work order.

--- Dispatch ---

KAITLYN.CLOW

44:21 Because the way FieldEdge works is they have to complete a work order every day that's on their board or their mobile app. If they don't complete, it stays on there. It goes to their schedule the following day even though that's not truly their schedule. So the way fill is designed, they have to complete each work order daily even when it's not truly complete, it's ridiculous.

BROOKE

44:43 Okay.

KAITLYN.CLOW

44:44 So, if they don't complete it, then that's something I do the next morning as I complete the work orders that were on the board the day before to get them off there.

KAITLYN.CLOW

44:54 It does it just to help streamline and clean it up on their end?

12089573489

44:58 So, with...

BROOKE

44:58 That, have you found that the force completion of work orders has led maybe some follow up opportunities to fall through the cracks.

KAITLYN.CLOW

45:09 Possibly, yeah, there's definitely double back or stuff that gets completed that technically isn't so, yeah. And then not to mention the only technician who can tag that work order is what they consider the primary tech. So when we assign a work order, lots of our jobs being commercial industrial require multiple technicians, we have to dispatch one being the primary tech or the preferred tech as you're calling it.

That is the only one that can actually tag those. So as those other guys complete their eight hour four hour, whatever it is on that job, they can't even tag it.

--- Dispatch ends ---

KAITLYN.CLOW

45:45 So the only thing we can have them do is kinda put it in their description when they're doing work order notes. Now, we have the option where I can go in under supervisor mode even on my app and I can change who the primary tech is, but I'm not gonna sit there and do that three or four different times on each work order, you know, each time multiple people. And then it makes things look even worse on the back end in the office because it's all over the place.

BROOKE

46:11 Yeah. Now, I can see how that would be frustrating. I didn't show it in my example today on our map scheduler but you can have as many technicians on a work order as you want to and they'll all be able to go and add notes and take pictures, whatever they need.

--- Forms ---

KAITLYN.CLOW

46:23 Great. You all at the same time, the office can work in it as well. Yes, yeah, great. Thank you.

BROOKE

46:29 Yeah, of course. Well, we'll touch on it lightly here, but for your context service trade, you're able to upload any sort of like paperwork that you need to. So say you had a formalized maybe maintenance or equipment checklists for your technicians to fill out. You can upload that into service trade as on the file PDF, right?

KAITLYN.CLOW

46:50 Right.

BROOKE

46:51 And then link that to Adobe. Acrobat, Adobe and acrobat, connect really seamlessly together. And then it's just a matter of your technicians filling and signing the paperwork and then it'll attach directly to the work order that they're clocked into.

KAITLYN.CLOW

47:05 Great. We have to do all that manually right now. We have a lot of national accounts where they have to do that exact thing.

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

KAITLYN.CLOW

47:13 What about?

KAITLYN.CLOW

47:14 Buying stuff like POS, you guys have a po system or something?

BROOKE

47:19 How do you manage your POS now?

KAITLYN.CLOW

47:21 And create our own po. We don't even use the build edge system because we, they have to send in an item request to the office, wait for the office to approve it before they can even pull a po.

--- Paper process ---

KAITLYN.CLOW

47:32 It's a horribly designed system that holds the guys in the field up way too long, especially when the office has 100 other things they need to do. So, we just give them manual purchase orders that they have to fill out. And then they use a scanner app to scan them and send them into Trello. Then the ladies have to go through Trello and manually interim into FieldEdge. It's ridiculous. Yeah.

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

12089573489

47:54 Okay.

KAITLYN.CLOW

47:55 Depending on what it is, we mark up some of them, if it's a quote, it's just a back end cost.

BROOKE

48:03 So, the POS are sent to Trello first and then...

12089573489

48:06 The gods, we do, we issue.

KAITLYN.CLOW

48:09 Our own po like one two three, the Chase and Chase buys something. He sends it to Trello. And then it's manually entered into FieldEdge, and they have to put a work order number, but it's a lot more steps to do what your system does all in one.

BROOKE

48:24 Sure. And then, so it sounds like you're technicians, are they cutting POS in the field or?

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

KAITLYN.CLOW

48:30 Exactly. They get a po book?

BROOKE

48:35 Gotcha. So to answer your question, service trade does have an additional po module. It's not something I have set up to talk about today much, but I can definitely send information about it. And if it looks like, you know, a need for the start, then that would probably be a secondary meeting.

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

KAITLYN.CLOW

48:52 How do most of your customers diverge those parts or account for truck inventory.

12089573489

48:59 So...

BROOKE

49:00 Go ahead.

MARIBETH

49:01 There's a couple of different options. So one would be, you could use the service trade, job number as your purchase order option. If you have multiple purchase orders assigned to a single job order or a single work order?

--- Parts management (inventory) ---

MARIBETH

49:17 You can use the job number one, a BC that's one way, or are you guys doing like any type of inventory management? Like do you hold a lot of inventory that you guys are trying?

12089573489

49:32 We don't track.

KAITLYN.CLOW

49:33 It really per SE, but we do have, they do have inventory on their truck. They use parts and pieces and then it'll be nice to be able to. Yeah, they just purchase some on a truck. They'll pull a po out of the po book and it'll be a truck stock po. So back in cost, and then we're just trying to see save extra trips when they're out there in the field, save the customer money as well. So they'll keep small amount of parts on hand as they utilize them. We also have forms that we call inventory issue. And with track any parts that come off the truck, which obviously the office has to manually enter as well. They'll upload the Trello the same way.

MARIBETH

50:12 Gotcha. Okay. So if you guys are trying to bring some more kind of automation to that process then partsledger which is our parts and inventory management application. So service rate is our core application. And then we have a suite of products. In addition to that. Partsledger would bring some automation to that process.

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

MARIBETH

50:32 Like Brooke said, she can send some information to you about that you guys can review. If it's something that you're interested in. We can set up a subsequent meeting about that. You can also kind of choose the crawl before you walk option and use the job number as your purchase order, kind of keep your processes at the same.

--- Parts management (inventory) ---

MARIBETH

50:53 It would essentially eliminate Trello, but there would still be some manual process in terms of tracking that depletion from the truck stock with partsledger. All of that would be automated.

KAITLYN.CLOW

51:07 Great. So it sounds like they could essentially do the same thing in the office. We have to go in and add it to the work order.

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

MARIBETH

51:18 Yeah. I mean, the technician can add it to the work order and also log the purchase order that is associated with that trip to the vendor or with pulling it off of his truck.

KAITLYN.CLOW

51:30 Okay. That's easy enough. That saves the whole scanner app and Trello, and pulling it from Trello. So.

KAITLYN.CLOW

51:37 We also use Trello for eight.

MARIBETH

51:42 Okay. I see. So you're tracking when you need to pay your vendors for that. You track that in Trello.

KAITLYN.CLOW

51:50 Yes.

KAITLYN.CLOW

51:51 Track it all through there. Yeah, all purchases and.

KAITLYN.CLOW

51:54 So we get a po, paperwork from a tech. We match vendor invoice to that. We add it to Trello. And then it goes to the next step. Either we add it to Quickbooks or accounting does, or it's paid by credit card.

MARIBETH

52:12 Okay. I still think potentially you might be able to eliminate Trello and the technician would have the ability of maybe if they go by a parts house, taking a picture of that pick tick, they can log the purchase order. When they're adding those parts in service train, they can source those parts. So they can indicate you guys can put in your vendors that they're typically going by like Ferguson or, you know, abc parts, take a picture of that pick tick. You guys would have a record of that on the job in service street, and then potentially eliminate Trello and just put that information in Quickbooks. Essentially, I think that might be something that could work with your processes.

--- Tech time tracking ---

KAITLYN.CLOW

52:57 Like you will definitely save some steps, thank you.

BROOKE

53:01 Yeah. Yep. So I wanted to spend a little bit of time on job items too, just because you mentioned there's like different labor, our time tracking that are appealing to you. So like exactly what Maribeth is saying, if I wanted to add in a job item here.

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

BROOKE

53:22 All right. So we're going to job items, we'll do add item and say that your technicians needed to add in something like a widget, just like she was saying, you can have your widget with your preset cost, and then you can add it in and indicate your source of where you got it from or if you need to order it from anywhere, whether it's a warehouse, a vendor.

--- Tech time tracking ---

BROOKE

53:44 And then you can select it and say the status of not yet ordered or received. Okay? Now, with labor, you mentioned the ability to track over time is important. So you can have different labor types in your job items. And so your technician, if you give them permission to, can indicate that, hey, they had some double time or over time labor that they need credit for too. And you can also add this from the office as well.

KAITLYN.CLOW

54:15 Okay.

12089573489

54:16 Okay.

MARIBETH

54:17 I do have a quick question about that since you guys are a union company is overtime tracked on a day to day basis. Or?

12089573489

54:25 It is anything?

KAITLYN.CLOW

54:27 Eight but travels paid in straight time. So, for instance, if they're traveling two hours a day an hour, they're our back, they're going to have to work 10 hours before they go into over time.

--- Tech time tracking ends ---

MARIBETH

54:37 I see.

KAITLYN.CLOW

54:38 Okay. But yeah, it is paid on a daily basis. They don't have to work 40 hours to get.

MARIBETH

54:43 Gotcha. Okay?

BROOKE

54:44 Cool. So let's say that as we were going through doing our maintenance, we may be identified an issue with the hvac equipment that we are working on.

--- Deficiencies ---

BROOKE

54:53 So in order for everyone to be on the same page in terms of what the issue is, we're gonna log in here under deficiencies, and I'm gonna go ahead and add a new deficiency. So the first thing it's going to have me do is add my description. So we'll just see that there is a broken fan. Next. It's gonna have me take a photo or add a photo from my library, but we'll take a live one here. So here is my broken fan for today.

KAITLYN.CLOW

55:20 Great. I love it. I see worse.

BROOKE

55:24 Okay. Let's say that your technician forgets to open up service trade and, you know, start snapping pictures on their camera role. That's fine, too. Button here. They can go ahead and add from their library and then add a few more broken fan pic, of course.

KAITLYN.CLOW

55:41 A great.

BROOKE

55:44 Next, they can select the severity of the deficiency. So keep in mind sort of the timeline aspect for the customer being able to say, you know, hey, we were here a couple of months ago, we made a suggestion to you, put it off. Now, we're at deficient or inoperable, you have that readily available to them so that they kind of understand why you're recommending the service that you are. So we'll go ahead and say it's in operable. And then we'll tie it back to our hvac unit and you can mark is either new fixed or verified. Some things are really easy to just fix right on site even so we want to help, you know, keep track of everything done. And today's example, we're gonna market as new so that we can quote it out together. And then your technician can add what they think the best solution is, which is usually either fixing or replacing something. So as soon as I save this deficiency report, the person in charge of perhaps ordering parts or quoting is going to be sent that report directly to their email and it's gonna say, you know, Brooke found a deficiency at I hop at this time and they can click on that and review the details and they'll be able to really easily flip it into a proposal.

--- *Deficiencies ends* ---

KAITLYN.CLOW

56:48 Great. Let's...

BROOKE

56:53 What do you think your technicians would think of? Maybe the overall mobile view here? Especially the deficiency reporting process?

KAITLYN.CLOW

57:01 I think they'd like it. I think it gives them a lot more options and I'd like to see them doing a lot more of that stuff in the field as it should be.

--- Paper process ---

KAITLYN.CLOW

57:09 You know, when Eric and I started in this trade 20 years ago, it was all handwritten service tickets and handwritten pull through forms and the technician did the leg work, you know, below a certain dollar amount. Obviously high in jobs, went to the salesman or whatever. But we've just had to kinda get away from that with the system we've been using creates a lot of more work for the office and management.

--- Paper process ends ---

BROOKE

57:30 Yep. Yeah. We want the, we want the technicians to folk focus on the work that they were hired to do, not meaningless admin work too.

KAITLYN.CLOW

57:43 Are more?

BROOKE

57:46 Anything here that I didn't quite click into that you're curious about before we head back to the office and flip that deficiency?

--- Tech time tracking ---

KAITLYN.CLOW

57:54 Are the technicians able to make?

12089573489

57:56 Edits from here at all?

KAITLYN.CLOW

57:57 Or is that just something that the office would have to do?

BROOKE

58:01 So on service trades, core platform, no, we don't let technicians edit their own time.

12089573489

58:07 There. Yeah.

BROOKE

58:09 There is an additional time tracking tool that we provide as well where it's essentially technicians on a weekly basis would go in and edit their time cards, maybe make any adjustments that they need to before submitting. So that's an option too, just depending on sort of how you want the process to work.

--- *Tech time tracking ends* ---

KAITLYN.CLOW

58:28 Okay.

12089573489

58:29 Yeah.

KAITLYN.CLOW

58:29 So, right now, they're kinda doing that, but just doing it verbally or getting with the office and letting them know when they have edits.

BROOKE

58:36 Yeah. So it would eliminate the verbal aspect.

KAITLYN.CLOW

58:40 That'll be great.

BROOKE

58:42 But even with this, they can, you know, say they forgot to clock out.

--- *Tech On-site* ---

BROOKE

58:45 They leave a comment for the office. It's right there for them and the office can make the adjustment. So it's just a matter of how you want your process to work.

KAITLYN.CLOW

58:52 Okay. Thank you. Yeah.

BROOKE

58:55 So, I'll go ahead and clock out here and it's gonna ask me what I've completed for the day. So I'm gonna say I'm all done with my maintenance. And then I think you'll like this. It's gonna say, am I done with this visit? Yes or no? Because sometimes, yeah, sometimes, you know, maybe we're done for the day, but we have to come back the next day or maybe we're running to home depot to grab parts and we're just clocking out for a bit. So you have the option to leave it open or closed. But I'm gonna say, yep, I'm all done. And now I'm clocked out.

KAITLYN.CLOW

59:21 Great.

BROOKE

59:22 And then go back to the office here.

BROOKE

59:30 And... let me know. Let's see.

--- *Dispatch* ---

BROOKE

59:43 Okay. Are we back on my job? I think we are.

KAITLYN.CLOW

59:47 Yeah, it looks like the dispatch board is the dashboard.

MARIBETH

59:52 The job, it's the.

12089573489

59:53 Okay.

BROOKE

59:54 Thanks. Well, here, we can see the Progress that we've made from a technician perspective, so we can see that it's marked as completed by the tech.

--- *Tech On-site* ---

BROOKE

1:00:03 But from an office view, we're still in Progress that's because we're doing our glance. Of course, down below, we can see all the Progress that we've made. So here's that widget I added in from a parts perspective. Here are my clock events. So I can see that, you know, I clocked in over a 1,000 Miles away from the job. So maybe a quick conversation to be had and then...

12089573489

1:00:24 And...

BROOKE

1:00:26 Then your office admin can click and edit these as needed. Say they see a note from the technician under comments that, hey, I forgot to clock out. They would just click and edit the time here. So really easy for them to do that. And then here is our deficiency.

--- Deficiencies ---

BROOKE

1:00:41 We'll come back to that in a second. Here. We'll cover it. Now, here's my broken fan. So say the office, they'll be sent this report nonetheless, but they'll click into this and they'll see.

BROOKE

1:00:59 Here are my deficiency details. So we can see that it's been marked as an operable. We found it today. She thinks we should fix it and it looks like this is the 40 first time this has happened. So definitely something to be mindful of for this customer. It's a recurring issue. Of course, we can also see the attachments that our technician has left regarding the issue here.

--- Quote templates ---

BROOKE

1:01:20 So here's our pictures. And based on the information log, we now know how to turn this into a proposal. So we're gonna go ahead and add this to a quote in service. A, you'll have a pricing contracts where you can basically preset your margins for a quote or customer, how much you wanna make on each job and you can go ahead and create that.

BROOKE

1:01:48 And now we've started building our quote. So to make your life easier during implementation with service trade, again creating templates is part of that. So we'll have you create quote templates too. So if you've got something like a broken fan replacement template, you probably have a little bit more description than I do here. I'm not sure why this one's so short, but nonetheless, you'll have your description and then you can preset your parts, labor and items too.

KAITLYN.CLOW

1:02:12 Okay.

BROOKE

1:02:12 And then just with a couple of clicks here, I essentially have my quote built. So we're also gonna show you things like your expected margin should that job get approved. So here, we can see we're aiming to make about 48 percent. If I make adjustments to the cost or prices, you can see that the percentage adjust according to that adjustment. I know exactly how much I'm making you'll also have full control over how you present pricing to the customer. Do you guys lean in either direction when it comes to like doing grand total versus line items? Does it depend on the customer?

KAITLYN.CLOW

1:02:47 It depends on the customer. Some of them like to see the materials separate from the labor and others just want it in one log quote sure.

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

BROOKE

1:02:55 All right. Well, we'll do line items prices today... and I've got my quote built here. So as soon as my quote is built, I could then send this to my customer. So Chase, I'm sending this your way if you're able to open it.

KAITLYN.CLOW

1:03:09 Great.

BROOKE

1:03:11 And then I'll pull it up here as well for everyone else. But Chase, if you're able to access it, I am gonna have you engage with it just a little. So let me know if you see it in your inbox.

KAITLYN.CLOW

1:03:25 Yeah, it looks like it's got an option to view and respond to quote.

BROOKE

1:03:29 Yeah. Go ahead and click that. But for your view, so here's what a quote would look like for your customer sent from service trade. So, of course, you have your name and logo at the top left here. Not our cute little art bark, but you would have the description of your work services to be completed, and then your pictures that you choose to.

--- Quoting ---

KAITLYN.CLOW

1:03:55 Looking easy. I get looks good.

BROOKE

1:03:58 Yep. And then I'm sure you noticed the approven request changes.

KAITLYN.CLOW

1:04:04 And then they can just accept it to.

BROOKE

1:04:06 Yeah. What kind of stands out to you about this quote compared to maybe what you're sending now?

KAITLYN.CLOW

1:04:16 It's able to piece together right now.

--- Quote templates ---

KAITLYN.CLOW

1:04:18 We have to, you know, click on FieldEdge, go to the customer, create a quote. You can, like you said, you can have a template in there that we can add there's. Usually some, you know, lingo, we gotta manually input, and then we put our hourly rate in our market rate and it, it'll to the profit like you're saying the profitability of the job... it totals all that.

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

KAITLYN.CLOW

1:04:42 But at that point, we have to save it, download it as a PDF, you know, save it and then email it over with the PDF attached.

12089573489

1:04:51 Okay.

KAITLYN.CLOW

1:04:52 Bye.

BROOKE

1:04:53 Minimize a few steps there from what?

KAITLYN.CLOW

1:04:55 Yeah, yeah, definitely.

BROOKE

1:04:57 Nice. Well, Jason, would you mind approving the quote for me?

KAITLYN.CLOW

1:05:01 No problem from.

BROOKE

1:05:02 Your view just so you can see what your customer would walkthrough and then we kind of we wanted to make the approval process really easy for them. And then we kind of snuck in a request changes button instead of a reject button. That way, you know, if there's a question or dispute, at least the conversations continuing.

--- Quoting ---

KAITLYN.CLOW

1:05:19 So that would be the customer, right? I'm gonna approve it.

BROOKE

1:05:25 Awesome. And you can have a notification setup of course, to be emailed when it's approved or even opened. So now it's approved. And I'm sorry, did someone have a question? I feel like I interrupted someone?

KAITLYN.CLOW

1:05:38 No, I'm sorry, we were just, I was showing them what you show here. Thank you.

BROOKE

1:05:42 Yeah. So now it's approved. And then back on service trade, a few cool things are gonna happen in terms of next steps.

KAITLYN.CLOW

1:05:53 Yeah, we'll discuss.

KAITLYN.CLOW

1:05:57 All right. Bye.

BROOKE

1:06:03 So now we can see that our quotes been approved. And then you can even dive into the history of the quote track the life cycle. So I can see Chase when you first viewed it, when you approved it, say you have some past customers that are taking their time getting back to you, at least, you know, hey they at least saw it, right? Run reports on that too. So you could say service trade, show me all of my quotes out there that have been looked at, maybe not responded to yet. And you can bulk resend things like that.

--- Quote templates ---

KAITLYN.CLOW

1:06:29 I like that.

BROOKE

1:06:32 Now, from here, now that our quotes approved depending on the situation at hand for you, all, you can either create a brand new job from that quote or you can add it to your existing work order. So that would depend on, you know, do you have parts available?

--- Tech On-site ---

BROOKE

1:06:48 Is your technician busy? So it just really depends. But for today, I'm gonna just add it to my existing work order.

BROOKE

1:07:00 And we'll copy here.

BROOKE

1:07:05 And now that work is gonna be attached to the previous maintenance I was doing, but again, you can separate them. Does that make sense?

--- Customer engagement ---

KAITLYN.CLOW

1:07:12 Yeah.

BROOKE

1:07:16 So here is this repair attached to my PM?

KAITLYN.CLOW

1:07:21 Great. So before.

BROOKE

1:07:25 We go on through saying that process from the time that I identified the broken fan in the field, getting that information back to the office, getting a quote sent out approved through viewing that. How do you see service trade helping increase your service revenue?

--- Quote templates ---

KAITLYN.CLOW

1:07:43 Time saves a lot of time and steps that would usually take hours between phone calls and things not getting drag and drop. I mean, we even have to add our, you know, Microsoft word template with our quote terms and conditions and your quote. You have it right there at the bottom.

--- Purchase decision ---

KAITLYN.CLOW

1:08:01 Yeah, just takes a lot of steps out of it, saves time not to mention that the technicians are doing a lot of the legwork itself in the field.

BROOKE

1:08:08 Right. Perfect. And speaking of time, I do know we're a little bit over. I wanna be mindful of your schedule. Do you have about maybe 10 more minutes?

KAITLYN.CLOW

1:08:19 Yeah. What I would.

KAITLYN.CLOW

1:08:20 Like to know is what's the process to switch into this thing and how much is it… down to the nitty gritty good question… take on FieldEdge?

BROOKE

1:08:36 Yeah. So let me see. So you are… depending on the specific, I guess it and products that you'd be beginning with.

--- Implementation and ongoing support ---

BROOKE

1:08:52 You all would undergo either a three or four month implementation based on your size and the scope of work you do in the conversation we've had today. And so implementation looks a little something? Let me see if I can pull up my.

KAITLYN.CLOW

1:09:09 Let's see.

BROOKE

1:09:13 Let me find that or I can talk through it. So essentially, you'd be paired with the project manager and you would have an implementation period of like I said, three or four months and you'd be paired with your project manager and have weekly calls with them. We do a lot of the heavy lifting when it comes to uploading the bulk of your data. So we would need things like your customers services, equipment, all that fun stuff for you. I have a document I can send you later, but we would do the heavy lifting on bulk implementing your data. And really your piece of the puzzle is making sure your technicians and you are, you know, doing the certifications, getting trained and then attending weekly meetings with your project management team. And those, the purpose of those meetings is to check in, make sure learning the systems going well… the data uploads going well, and just keeping everyone accountable. So it's a very hands on process.

BROOKE

1:10:12 Mary Beth, send it to me. Thank you.

MARIBETH

1:10:14 Sure. Yeah.

BROOKE

1:10:19 So I will send you guys this document… one second.

BROOKE

1:10:29 Yep. So here we have our structured onboarding process. So again, compared with the project manager, you'll have a kickoff call to sort of set expectations on here's. Our goals for the week. Here's. The order that we wanna do things like that. You'll have your certifications... and then here's some of the data that we would need from you just as a.

12089573489

1:10:49 Review. Does that answer your question?

KAITLYN.CLOW

1:10:55 So let's say we want to start it on the first. So we have like do we start with, what do we start with everybody? Or do we let like one person start out with it? So he, like Chase could get familiar with it, and then we kinda migrate into it.

12089573489

1:11:09 Yep. So you'll start with everyone?

BROOKE

1:11:10 One, we found that the best way to sort of implement new software is to just dive into feet first, have everyone learning at the same time you'll have a project lead, of course, that might work more closely with our project managers and sort of take the reins on things. But everyone's going to have access to the training. So... for your context, we have a bit of a queue for getting started... so.

KAITLYN.CLOW

1:11:36 Well...

MARIBETH

1:11:37 Quick, real quick. Just as a heads up, we'll do, you know, testing in your account? Yes, everyone will start. But if Chase wants to kinda get started earlier during the implementation and do some testing and set up some dummy jobs or even set up some real jobs, we can absolutely do that so that you guys can kinda nail down what your standard operating procedures will be. But in terms of your goal live, once you guys are through your implementation, yes, you'll roll this out to your entire team.

KAITLYN.CLOW

1:12:10 Okay. Okay. Nice to do that. I think to have like Chase kinda just dabble with it a little bit as we're starting the process of entering it, you know, I think that's a good idea.

--- Implementation and ongoing support ends ---

KAITLYN.CLOW

1:12:23 I'd like to be able to get work orders, real work orders set and created on this new platform to try it dispatch. I spent probably half my time in the field and then, yeah, figure out what works best for us before we roll it out to everyone. When we do that training. Is that on an individual basis or can we train them all at once? Just?

--- Implementation and ongoing support ---

MARIBETH

1:12:45 You, I guess you could do it all at once. But the way that we do it is we issue an online video based training based on their role. So technician office admin... you guys can have a dashboard to see who is completing those certification trainings. How far their completion is they actually have like some quizzes. So how are they scoring? They have access to that certification for the time that you guys are, you know, a customer as we update the platform, we update the certification training, if, you know, they're having trouble, let's say, you know, documenting deficiencies the way that you want, you can point them back to that module in the certification training. So I would recommend that, you know, they go through it individually. It's self paced, you know? So it's for the tech, it takes maybe a couple of hours, but it's broken down into 10 to 15 minute videos. And then if you wanted to, you could have, you know, like an hour Q and a session with your project manager from the technician standpoint, or, you know, you guys could have like an internal group training.

BROOKE

1:14:05 And then for additional context around onboarding. So we essentially onboard based on a... tier of sort of the complexity of your project and for the tier that I think Maribeth and I would recommend for you. We're currently at just depending on your timeline. We're at three spots for January fifteenth and then it would then move to February first to begin the implementation process. Okay? To touch a bit on pricing. Let me pull that up here.

--- Pricing ---

12089573489

1:14:40 See.

BROOKE

1:14:40 Okay. So based on your size and the conversation we've had today, I would recommend you start in the middle premium tier here. So most companies over 10 texts are between premium or enterprise just depending on a, how complex you want to start off with. I'm recommending premium for the reason that it allows you things like access to our additional suite of products like partsledger, and then, you know, you could so contract work if you need to, you'll have that customer portal for your customers to log in and see their own information. If that's something that's appealing to you too. And it just gives you a bit more flexibility when it comes to like project management and then, you know, additional functionality here. Yeah. So premium runs one 39 per month per technician and we do Bill annually. And then the first year, there are some one time onboarding fee. So, I think you mentioned you have 12 technicians.

--- Dispatch ---

BROOKE

1:15:50 You guys still with me?

MARIBETH

1:15:54 I think we lost our.

BROOKE

1:15:56 No. Well, I don't even see them on the meeting anymore. They thought they saw the price and they dropped off.

MARIBETH

1:16:06 I...

12089573489

1:16:08 I...

MARIBETH

1:16:08 Guess that's a know.

BROOKE

1:16:12 Hey, Kaitlyn. I don't know if she can hear me yet. I don't know how much of that. They heard, but... hey, Kaitlyn, can you hear us? Let's see?

BROOKE

1:16:31 Are we back?

12089573489

1:16:33 We're back? We had a problem that's okay. You're just on you're just on our phone, my phone. But... okay. So, so like how does it, like what, what's the, how much does it cost? Just curious? Yes. So, sorry.

BROOKE

1:16:48 Talking about numbers and then you guys dropped off and me and Maribeth were joking that you guys hang up on me?

--- *Pricing* ---

12089573489

1:16:55 Computer guy. Sorry. Yeah, it's been a Monday even though it's Tuesday, God, I forgot.

BROOKE

1:17:04 So, in case you didn't hear my whole numbers feel. So, can you still see my screen that I'm sharing?

12089573489

1:17:09 Like my phone... on the laptop right now?

BROOKE

1:17:19 Tally there's three tiers of service trade and based on our conversation and your scope of work, your size of your company, I would recommend either the mid tier premium or the top tier enterprise, probably the premium.

--- *Dispatch* ---

12089573489

1:17:34 Hey... you guys?

BROOKE

1:17:43 Joined on to audios you might want?

KAITLYN.CLOW

1:17:47 Sorry?

BROOKE

1:17:51 Okay. Yup. So for you guys, I would recommend the premium plan here or?

MARIBETH

1:17:56 That is.

BROOKE

1:17:57 One 39.

KAITLYN.CLOW

1:17:59 Here.

BROOKE

1:17:59 I'll pause.

12089573489

1:18:04 Good.

KAITLYN.CLOW

1:18:12 I...

MARIBETH

1:18:12 If you go down, okay. Now, we...

KAITLYN.CLOW

1:18:16 Sorry?

BROOKE

1:18:19 It's still going?

KAITLYN.CLOW

1:18:20 Go on. I think.

--- Dispatch ends ---

BROOKE

1:18:24 Audio with...

MARIBETH

1:18:28 I...

12089573489

1:18:39 Let's see the.

12089573489

1:18:44 I'm just gonna try.

12089573489

1:18:55 I let... no, the day. Yeah.

12089573489

1:19:10 Hey...

MARIBETH

1:19:11 How are you?

12089573489

1:19:12 Okay. Okay.

12089573489

1:19:17 Like one 39 for?

BROOKE

1:19:23 All right. All right.

12089573489

1:19:27 Back to you. Okay. I think.

BROOKE

1:19:29 If you have another device that's joined on audio?

12089573489

1:19:32 Maybe that's what it is. I think it's her laptop. There was like two sessions on there. It was really weird so.

--- *Pricing* ---

BROOKE

1:19:38 That sounds better though.

12089573489

1:19:39 Right. That better, perfect. Right? Take three. Okay. So for you guys.

BROOKE

1:19:49 I would recommend the mid tier premium plan here. It covers everything that we walked through today and a few things that we didn't quite get into like the customer portal, and this is best suited for 10 to 20 technicians. So it does give you some growing room as well. And so this is where I would recommend you start. So this is one 39 per tech per month billed annually. And then there are some one time onboarding fees as well. So, just to clarify you're at 12 technicians, right?

12089573489

1:20:15 Yeah.

BROOKE

1:20:17 Okay. So let me pull up my calculator just so you can see that I'm being honest here.

12089573489

1:20:26 What about the admin people? Do we have to pay for the admin people too for the technician? Yeah. So.

BROOKE

1:20:33 Our theory here is you pay for who drives revenue in the field. So we charge for mobile technicians, admin users are unlimited and free. So at premium, let's say 12 technicians?

BROOKE

1:20:50 You don't need any of that. And then the only thing that would drive this cost up as of now would be any sort of like PDF form. So we charge 149 per page to put those in for you. If you wanna watch a YouTube video and do it yourself, that's fine too. But just there, but quick ballpark pricing for 12 technicians on premium including the onboarding fee, your first year total would be a little over 24 K here, your onboarding would be covered under the 4,200 dollars that's a one time fee for getting your account set up, getting your technicians trained, you know, access to our training materials too. And your annual sub.

--- Implementation and ongoing support ---

12089573489

1:21:29 Thank you. Cool. Now, if we wanna do this, like what, what's the time frame like when could we start? Like implementing this thing? Yeah.

BROOKE

1:21:45 If you guys are ready to get going our next available spot for the services we've discussed today is January fifteenth. And so those dates are secured by signing.

--- Implementation and ongoing support ends ---

12089573489

1:21:57 Okay. Cool. Well, let us talk and then we'll Susan, we'll email you, but if we decide we'll just have you put us in that slot for that. So we get started right away... that slot not available. What would be the next slot?

BROOKE

1:22:11 So, there is... three spots left for that slot.

--- Purchase decision ---

BROOKE

1:22:16 I imagine that those will go pretty quickly as it is our busy season after that, it would go over to February first as a start.

12089573489

1:22:23 Yeah. I think we'll probably email you really shortly and just take one of the fifteenth is what we'll do. So.

BROOKE

1:22:31 Okay. Are you expecting to make that decision today or what?

--- Purchase decision ends ---

12089573489

1:22:36 Yeah, we'll email you here soon?

MARIBETH

1:22:40 Would it be helpful if maybe we put together some formalized pricing and send it over to you as a signable contract? If you, okay. Yeah, we can put that together and send it over. It's a signable version. But of course, you know, we'll have it expire maybe tomorrow just to, in case those dates get taken before. Then in the meantime, please, you know, reach out with any questions. Do you guys wanna schedule maybe like a 15 minute call, you know, in the morning tomorrow to discuss any questions that might arise internally?

12089573489

1:23:17 Yeah. We could do that. Yeah, we'll do that at nine o'clock again or something. Okay. Yeah.

MARIBETH

1:23:22 Does that work for you?

BROOKE

1:23:24 Yeah. Yes. So I... let me see because I am flying back from California to North Carolina tomorrow and so I just have to double check what time everything is, but I should be able to make a 15 minute meeting.

MARIBETH

1:23:40 Okay. And I, I'm a bit, I'm not fine. So I'll send a calendar invite over for 15 minutes to all of you just in case there's any follow up questions that you have.

12089573489

1:23:52 Okay. Thank you a very.

BROOKE

1:23:55 But that in mind, we'll still send over a signable agreement today. If you did want to get started, if you need us today, I'll send over mine and Maribeth contact information.

12089573489

1:24:08 Okay. Thank you.

BROOKE

1:24:10 Yeah, of course. Is there anything else that we can help with before we send that over?

12089573489

1:24:15 No, I think we're good.

BROOKE

1:24:17 Okay, perfect. Well, thank you everyone so much for your time and your transparent communication today and we will get to work on sending that over for.

12089573489

1:24:26 Thank you. Thank you. Okay. Thanks, everyone. Bye.

The End