



ServiceTrade Demo with A & B Mechanical Inc

Dan Waggoner with A & B Mechanical Inc
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Transcript

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DAN

0:00 Morning, Greg. Looks like you are still connecting to audio there. So I'll give you a second.

DAN

0:15 All right.

GREG

0:17 So, you, so you can hear me because I don't okay.

DAN

0:22 I gotcha. Can you hear me good?

GREG

0:24 Yeah, yeah, absolutely.

DAN

0:27 Right. Well, fantastic. Well, Greg, nice to meet you and it looks like you're on the phone for audio. So, do you have video as well though? I'm guessing.

GREG

0:37 I see you. Yes, you don't see me. I don't have a camera and I don't have. Okay, I'm old school. Yeah.

DAN

0:45 Yeah, that's fine. I just wanted to make sure you had a screen, to see, the product.

GREG

0:49 Yeah. So, I know, I think you.

DAN

0:52 Perfect. Well, Greg, my name's Dan. I am the inside territory manager for service trade here in California. I've been with a company for just over three years now. So, worked in California, Arizona and Nevada primarily in my time here at service trade.

So, looking forward to learning more about and B mechanical and what has driven you to sort of start looking into it just software and upgrade some of your technology. And, for me, these meetings, you know, I don't want to be talking to actually the whole time, but to give you an idea of what I like to do for these meetings is essentially hear from you a bit, right? What, what you're interested in? What's most important to you?

--- Customer engagement ---

DAN

1:35 What kind of customers you have, what kind of equipment you're working on. And then we'll dive right into the product. I'll walkthrough several workflows and service trade pointed at, you know, what's most important to you, and also provide you a glimpse of, hey, you know, these are the things, that we excel, right?

--- Purchase decision ---

DAN

1:51 As as a provider, if you see value in it. If it looks like something that's going to be a good fit for you, then towards the end, you know, we can start talking about next steps and pricing, but that's kind of my plan overall. Does, does that make sense for today?

--- Type of work ---

GREG

2:06 Yeah, that's fine. Perfect. Okay. Give you an idea. We are 100 percent commercial... company. We do not do any residential at all. None zero.

DAN

2:19 Terrific.

GREG

2:19 So, with that being said, most softwares are like ServiceFusion was originally designed for residential per SE, not necessarily commercial, we adapted and modified, but they still there's things that they can't do that I found going through different companies and finding out that they're okay.

--- Type of work ends ---

GREG

2:46 They're they're really okay company. But, and the but, is they don't they can't track it the way I want it. They can't... I don't know. Was it you, I was talking to yesterday?

DAN

3:00 No, it was actually tray who set this meeting up, but it sounds like asset and equipment management is big for you. Is that some of the stuff that you're running into with fusion?

--- Assets ---

GREG

3:08 Well, first off... okay. So if I dispatch a gentleman to one of my accounts and that account then goes, hey, I got two more things to work on. And so they, my mechanic goes and works on those other two things. I have no way to.

GREG

3:33 By them, clicking on the asset, the assets in the system. Okay? That's fine. But everything that was done to that one particular asset is not individual. It's tied to that whole single service tag. Okay?

DAN

3:49 Okay.

GREG

3:49 And that's a huge problem because I've got to be able to search by the piece of equipment. I got to be able to search by the customer. I gotta be able to search by. So if I have like one customer, I have has nine killers. Each one of them has its own asset number because that's the way they work. So if I take their asset number and plug it into the system, do a global search on. I can pull it up. But the problem is that it's only gonna give me the ones that were individual service calls. Multi service call is not there because it has no way to link the information I'm saying or if it does, I gotta go, if it gives me that particular one where he worked on three pieces of equipment. Now, I've got to go open that job and physically search the notes and hopefully he defined it out the notes on that piece of equipment only. And then I can, you know, then I have to, I'm taking a whole another step. I don't need to be in.

DAN

5:01 So, I mean, it sounds like a huge.

GREG

5:05 Okay. You know, searching by customers ServiceFusion is good. I can go in there. I can look at the history of the customer. I can click, on the address because it just gives me all of them. And then I can click on the site location. It'll filter out and give me just site for that particular site.

--- Assets ends ---

GREG

5:28 But now I have to search the whole fucking thing or my French. I gotta search the whole thing by manual by hand because it doesn't come, you know, I can't search it by that one location for any known reason. You know, I gotta go through and look

at everything. I can't search PM, so I can't which that's another issue that needs to be addressed. Okay. You know, the invoicing, I'm assuming you guys do Quickbooks integration we do.

DAN

6:06 You could also.

GREG

6:08 Do because I need to have cost analysis.

DAN

6:13 Yeah.

GREG

6:14 No worries. I got to be able to see what's profit, what's not profit on the job?

--- Assets ---

DAN

6:19 Yeah. We got you covered there. I wanna roll back a little bit here to, the equipment, right? Make sure I've got a good understanding of that. So, you mentioned it sounds like what you would like to have is when you pull up a piece of equipment underneath the customer account. So, you see, hey, you know, my customer over here in San Jose has nine filler. I know that, you know, the chiller, is that this building and I wanna look at the chiller now and I wanna look at all the specific service only about that chiller. So I could drill down and just say who touched this last? When was the last repair? When was the last inspection? When was the last service basically see the status of the equipment? See, any previous services done to that equipment or any upcoming services as well? Is that, am I getting that the right way?

GREG

7:11 Yes, absolutely.

DAN

7:13 Okay. Excellent. And then you mentioned PMS. So, so when you say search PMS and track PMS, can you help me understand, I guess what's important there and what you're looking for?

GREG

7:27 Well, if I put things in, okay? Like ServiceFusion is at best the half a way of tracking my PM and it's at best have ask how to get the pertinent information in there.

--- Assets ends ---

GREG

7:44 So I have to make the very first PM, I have to make it, I got to put all that information in and then it becomes a reoccurring thing, which is fine. Okay? But it doesn't tell me when it re, occurs, it doesn't okay. It doesn't generate a number.

--- Assets ---

GREG

8:08 Okay? So now, I'm having this whole issue because I need to have there's a customer in San Jose. We have it'd be great to have the filter size, plug them in filter sizes. And when I dispatch it to my mechanic here, it is. And... are they're on wheel call, you know, generator off a po, blah, blah, blah.

--- Assets ends ---

GREG

8:31 Okay. And that's what, you know, ServiceFusion can't do that. It just doesn't have the ability. I've asked them for certain things and, yeah, we'll get to it and which I understand they're tailoring everything to the... more. So the residential guys for a better term. Yeah, they've helped, they've done some things. But every time I call them and say, hey, I need to have this done, can this happen? But we'll put a ticket in for it and we'll if they, if we get enough request for it, then we'll bring it to the top of the surface and I can't have that either.

DAN

9:14 Yes.

GREG

9:15 I gotta be able to have people that are listens to me and, you know, I'm just as important as all the rest of the people even though mine might not be for 50 percent of them were the other 50 percent, it would benefit them also as a.

--- Type of work ---

DAN

9:35 Yeah.

GREG

9:37 I think that's software.

DAN

9:41 Yeah. And I think that's where you sorta hit the nail on the head, right? ServiceFusion, primarily their customers are not doing the same type of work your customers are doing or our customers are doing, for example. So, they may have a couple of commercial contractors under their belt, but those are not their primary

customer base. So, yeah, they're not going to be, they're not really built for you and they're not gonna put a lot of work into making it for you.

GREG

10:08 The reason why I shied away from ServiceTrade started out as... a residential commercial like commercial.

DAN

10:19 You said that's why you shied away from service trade?

--- Type of work ends ---

GREG

10:24 Yeah.

DAN

10:24 Okay. So we're service?

GREG

10:26 Right. I got, I checked in, I checked in the system. Okay? It's, it's not something new, okay?

DAN

10:36 Well, just to, just before we get too far ahead of ourselves, I just wanna make sure we're on the same page because I thought I heard you say that we started with residential?

--- Type of work ---

GREG

10:44 No. Okay. Yeah. Wait a minute. I started with a software program that was residential.

DAN

10:54 Gotcha. Okay.

GREG

10:55 Okay. I...

DAN

10:56 Must have her.

GREG

10:57 Yeah. My business is going to start from residential now, you know?

DAN

11:01 Yeah.

GREG

11:01 Well...

DAN

11:02 Neither did we, so that's the same with service trade, right? So, 10 years ago, we started in the commercial service space and we have not gone anywhere else, right?

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

DAN

11:12 And we only work with skilled labor type businesses, right? So contractors who require their technicians, you know, they're performing skilled labor. They're not doing things like gardening or landscaping or bug spray, right? This is skilled work. So those are our customers. And from what I've learned about you on your website and from what tray shared with me after the call yesterday, seems like we line up pretty well with that so far, something I did want to ask with you, or about was for your customers, right? So it sounds like you've got some maintenance contract?

--- *Type of work* ---

GREG

11:50 Yeah.

DAN

11:52 Would you say that that's the bulk, of your work that you're doing?

GREG

11:55 No, no, no, not even close. Okay. It's probably, it's probably a quarter of what my total work is?

DAN

12:04 Okay. And what's the, is most of the other work driven from the maintenance. So maybe repairs that come from those maintenance calls?

GREG

12:13 Okay. Some is just the shit is broken old. I guess some customers got some real old crap.

DAN

12:21 Yeah. And is that, so those customers they're calling in, it's more of a reactive hey, heats out, you know, acs out that kind of thing and you just have to go out there. Okay?

GREG

12:33 Standard typical service work.

DAN

12:36 Gotcha. And so outside of...

GREG

12:39 We, we do... probably 10 percent of my business is also Construction work or, okay, job related works. So I need the program to be able to do cost analysis for me. I needed to be able to track the job.

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

GREG

12:59 I need to be able to do Progress billing on the job. I've gotta be able to do my project managers gotta be able to access it. Got the system has to be able to do quoting and putting together quotes with job costing of thing. I mean, it's super important on that end of it. Okay? On the big projects?

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

DAN

13:29 Yeah. And so I would imagine that, with the reactive service calls and then, the maintenance calls that you're doing it's quite often that your technicians are reporting an issue that they can't necessarily get done that day or that might require you to quote the customer for what you found.

--- *Deficiencies* ---

DAN

13:44 So, hey, we found this. This is how much it's gonna cost to replace it. This is our recommendation. Is that very common?

GREG

13:52 Yeah, that's pretty standard. Okay. It doesn't deviate from that. I mean, my guys go out there. They'll find something wrong. We tell them to write it up and then they send us a green sheet and we quoted in here in the office... go from there.

--- *Paper process* ---

DAN

14:08 Okay. Would you say a bulk of your work comes from, that process, right? The guy goes out, assesses the situation, writes up the green sheet. You quote it to the customer?

GREG

14:22 Yeah. Well, no. Well, it's hard to say, okay, really?

DAN

14:28 That's okay. I was just curious.

GREG

14:29 On, on, I have 12 mechanics. So out of 12 mechanics, I'm seeing.

--- Pricing ---

GREG

14:40 Probably 12 mechanics. I'm probably getting three to four per mechanic. I'm getting that anywhere.

DAN

14:49 A...

GREG

14:50 20 to 30, 20 to 30 follow ups in a week. And my service lady who does the dispatching and all that. She takes care of all that. She, she gets up from them.

--- Purchase decision ---

GREG

15:03 She does all the preliminary stuff. And then I look at it or my son looks at it and we say yes or no. It's a go type of thing on the.

DAN

15:16 Okay. Gotcha. Well. So, so that workflow, is gonna be a big part of what we talk about today and sounds like it's important for you along with equipment tracking. And so, looking forward to jumping into this with you from what I understand you've been getting ready to, you know, you're kind of, I don't wanna say, I mean, is this urgent? You're looking for software right now? Are you on a deadline at all?

GREG

15:44 Well, you're on a deadline, not me.

--- Purchase decision ends ---

GREG

15:48 I'm already involved with BuildOps right now. Gotcha. And I gave tray the opportunity to give you a one time shot thing showing me your system even though I have already paid for BuildOps and we're in the process of doing.

DAN

16:08 You've paid for build apps?

GREG

16:10 Already? Yeah, I haven't gone live yet, but yeah.

DAN

16:14 You're onboarding right now?

GREG

16:17 Correct. Absolutely. So you've already?

DAN

16:21 Signed a contract with them.

GREG

16:23 No, I've paid them money. I've not necessarily signed a contract with them but... it, it's a lot point. At this point. I need to, I need to, according, I'm... entertaining this only because tray or the gentleman I talked to you yesterday was very adamant about doing all this.

--- Pricing ---

GREG

16:48 Okay? I told him a specific thing. I told him specific things and he told me, yeah, I'll get our guy on, you know, my gone, he'll be able to show you everything. Okay? Cool.

DAN

17:00 Well...

GREG

17:00 I can definitely there's certain things and then what it's gonna cost me, I need to know. Is it based on, per mechanic or is it based on a flat fee per year?

--- Pricing ends ---

DAN

17:15 Yeah. So I'm a little confused... because typically, right, I'm familiar with BuildOps to a certain extent... and I'm glad to have you here, right? I'm happy that we're able to meet and connect. Typically, they get contracts with their customers before they start onboarding them that, that's from my understanding, maybe I'm wrong, but...

GREG

17:40 It may be, I haven't you know, it's there's so much shit happens in a day around here. So it's very bad. I don't realize that I do.

DAN

17:51 Gotcha. Would someone else maybe signed it at your company or are you the one that typically?

GREG

17:56 Yeah, I'm the guy that pulls the trigger.

--- Pricing ---

DAN

18:00 Okay. So, are you paying?

GREG

18:03 Yeah.

GREG

18:13 A year ago almost a year?

DAN

18:17 Was about a year.

GREG

18:18 Ago that you signed on with them? Yeah, about that.

DAN

18:22 Wow. So, you guys aren't live and you signed on with?

GREG

18:26 Yes, I did sign a contract because it's right here in front of me. I just pulled it.

DAN

18:33 Okay. When did you sign that?

GREG

18:41 Just under a year. It's about seven months.

DAN

18:44 Wow. So it's about to expire then? Did you sign for, the year? I would guess an annual?

GREG

18:51 Yeah, I'm pretty sure that's what it is. I'm just trying to open the documents so I can get an idea. Okay?

--- *Purchase decision* ---

GREG

19:13 But anyway, so I, like I said, I told the gentleman yesterday, he's got exactly he's got today and today only this morning and I see I need to get drilled down on your system and then figure out what you're talking about pricing. And then, yeah, I can either pull the trigger or I can... or I stay with BuildOps. I'm saying.

DAN

19:45 So, I'd love to jump into the platform. I think that's what we need to do, right? I know that you're here to see it and that's what I'm here to provide. However, if you, I wanna stick on this for just a second because I wanna make sure I understand what's going on.

--- *Pricing* ---

DAN

19:57 It sounds like to me that you signed up with build up a year ago almost and you've paid them for a year's worth of subscription, but you are still currently using ServiceFusion. Is that right?

GREG

20:10 Yeah, and yes, and some of that's my company's fault and some of it, it's their fault.

DAN

20:17 Okay.

GREG

20:17 Onboarding, the onboarding got dropped by them. And, okay, well, we're extremely busy. So, there's three of us in the, in this office and so to try and coordinate onboarding and... getting the system, you know, up and running. And I've yet to have that conversation with BuildOps? Okay? Have a compensation. I've paid X, amount of thousands of dollars and we're not even live.

--- Pricing ends ---

DAN

20:48 Yeah. Well, Greg.

GREG

20:49 Let me tell you we'll have a conversation about that situation. But on the same token, I need to see, I'm giving this gentleman and you the opportunity to really drill down on your software. So I can, yeah, I know the issues and I know what has to happen and need to find out if you're capable. And then if that's the case, then what are we talking in dollars and cents?

DAN

21:19 Yeah, absolutely. Well, let me go ahead and share my screen with you here, Greg. And so, I'm curious because so this isn't the first time I've heard that from a customer of BuildOps, right? They've been signed up for over a year and they weren't able to get live.

--- Implementation and ongoing support ---

DAN

21:38 So that, that's a pretty big red flag typically, for customers who aren't able to get live within a year of signing up with a customer, right? I bet the expectation set there was far less than a year to go live. And I know that you're shouldering some of the blame but hey, contractors are busy, right? We deliver and we get our customers up and running for a company. Your size under 90 days would be our goal and our target and we're gonna stay on top of you to make sure it happens.

GREG

22:09 Do you have people that come to my office to bring my mechanics up to speed on the side of the app that goes with ServiceTrade?

--- Purchase decision ---

DAN

22:23 That is something that we offer. Absolutely. What, what was the biggest issue? Do you think with your onboarding? What was some of the hang ups?

GREG

22:31 But I'm not gonna look. I have my time is too valuable to just go down this road. I need you to bring the software up. We need to go through it and then talk about other things. It's a move point whether you know, what transpired and what happened. I don't really need to get into that right now. I just need to okay, your software and what's it, what's its abilities. Gotcha. Well, I already know what BuildOps can do.

--- Purchase decision ends ---

DAN

23:03 Gotcha. Well, it sounds like what they can do is unfortunately, they can't get you up and running though. That's that's, the thing I'm wondering.

GREG

23:11 Like, like I said, that's a moot point at this point. Okay? It is, that will be determined on other things that's transpiring.

DAN

23:23 Okay. Well.

GREG

23:24 I let's move along if.

DAN

23:26 Okay.

GREG

23:28 Reason think.

DAN

23:28 If I might, yeah, absolutely. If I might just say one last thing, that I would recommend that you consider as you consider resigning with the company that you paid for an entire year and you're not even live yet. I would speak to some of their customers and I'd love to set you up with some of our customers, right?

--- *Type of work* ---

DAN

23:48 Because we've got several customers right in your area that are up and running live with service trade. They can talk about their onboarding experience and how we help them implement, this software while still managing business, right?

GREG

24:02 Who are the companies, what's that a few of our...

DAN

24:05 Customers, paragon, mechanical, integrated, comfort, air, service, air systems and service.

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

DAN

24:12 Let's see western allied, mechanical, Therma corporation, thermatech California boiler. Those are a few that come off the top of my head. We've got over 150 customers in California alone. Do any of those sound familiar to you?

GREG

24:26 Yeah, that's why? Okay. No, yeah.

DAN

24:30 You have contact over... so.

GREG

24:36 You can use it or my competition.

DAN

24:39 Gotcha. Okay. Well, yeah, you know, as you're considering this again, I think it would be probably very helpful for you just to talk to someone who's gotten up and running with service trail, right?

GREG

24:54 Okay. Let's, let's get into the software.

DAN

24:58 Okay. Got it. Let's do it. So, so Greg, I wanna give you a little overview here of what service trade provides and we're going to dive right into the platform. So what I've got for and like I mentioned earlier, right? We started in the commercial industry and we have not expanded from there.

--- *Type of work* ---

DAN

25:16 We have no plans to start offering our services to residential, right? We're here to stay. We provide our services only for commercial industrial type contractors. So 10 point 5,000,000,000 invoice through our platform. Just last year. A lot of commerce running through the platform been doing this for over 10 years, 1,200 plus active accounts right now.

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

DAN

25:37 This slide was made about six, eight months ago. I think we're over 1,300 active accounts currently, and assets like you talked about equipment very important to you. 13,000,000 assets are being managed by a contractor using service trade assets that are in our system. And at that accounts for over 10 percent of the commercial industrial building serviced across the United States.

DAN

26:00 So this is definitely something we've been doing a long time. We're very familiar with and... we've delivered on. So first and foremost for us improving, your service project operations. So both your service and your projects right in the same platform, give you centralized visibility here into your cost. Like you mentioned into, the labor that you're expanding materials, keep everyone on the same page, understand where you're winning where you're losing and maybe where there's room for improvement, how technicians are performing the different types of opportunities that you have. So pull across the board visibility. It's very important for us as well setting your text up for success, right?

--- Access to information ---

DAN

26:45 So something that they can easily use to access all the information that they need, but also recording all the information that you need on the back end and provide the customer with updates following each job. So we'll walkthrough the mobile application today. Quick snapshot of information for the technician. We don't want them stuck calling around or trying to figure out where information is. So service trade go.

--- Access to information ends ---

GREG

27:12 Go ahead. No, no. Go ahead. I'm sorry. No, no. Go for it. I'm talking a lot, but I understand what I understand what you... I was just gonna add to well, feel free.

DAN

27:27 I don't want to be sitting here talking at you. Sorry.

GREG

27:31 Okay. Keep going. Okay. I tend to jump in when anyway go go.

DAN

27:38 Gotcha. Well, feel free to jump in whenever you'd like and interrupt me. I don't mind definitely like to keep this like a conversation but I will, I'll keep on moving for now. So selling service agreements and managing, and winning more project type work is something that ServiceTrade really excels at, right?

--- Assets ---

DAN

27:56 So we're able to manage that pipeline where you manage your opportunities. We actually have the ability to scan equipment in the field and an equipment library. There were 30,000 different types of assets in the, for the mechanical contractor that

automatically populate, you know, manufacturer recommendations based on the serial number that scan. So that's a library that's already built into the system. So you're talking about adding assets in the field or collecting asset information with service trade and Northboundary, or sales management tool. You can literally scan the tag, the name plate of a piece of equipment and pull all of that information into service trade within a few seconds.

--- Quote templates ---

GREG

28:38 Okay.

DAN

28:39 And so I wanna share a little bit more. I'm sorry, go ahead Greg.

GREG

28:43 That's the same as build off. Go ahead. They have that ability. I take a picture and it automatically populates in an asset format to pull.

DAN

28:57 Okay. Well, one thing I know that there does not have is the equipment library, right?

--- Quote templates ends ---

DAN

29:03 So our sales management tool was built by a contractor, right? Who's worked with mechanical companies for 30 plus years, and he's actually built out a library of over 30,000 different types of equipment. So when you scan that name plate, the application recognizes what kind of equipment it is rather than just picking up the letter numbers on the tag, if that makes sense?

--- Assets ---

GREG

29:29 Yeah. No, I got it.

DAN

29:31 Okay. So that was something I was talking to someone yesterday.

GREG

29:35 Your system? All your system does is it because it's got so much database in it. Already. When you take a picture or scan that picture, it knows by the model number, who the manufacturer is, just by it because they're all the same train, the

numbers or a certain way, carriage and numbers, or a certain way. So, it is easy that's just, yeah, I got.

--- Assets ends ---

DAN

30:00 So, what it'll do from there and I wanna, I've got something I can send you after this. It's actually a walkthrough on your own because I don't think we'll have time to go through that aspect of it today, but it's a self driven demo where what you can do from there, right?

--- Quote templates ---

DAN

30:14 Once it recognizes the equipment, you can just select from a list here's. The recommended tasking for that type of equipment and the maintenance that we should recommend. And so you can...

GREG

30:24 Quickly.

DAN

30:25 Add that service and build out that proposal for the customer using all of these preset pricing models. And of course, you can adjust them as you needed and save them and just use them over again whenever you need to. So it seems like it really fits into what you were talking about with being able to have someone anyone really in the office build out a proposal or quote based on your rules and your automations that you set up and then have yourself review it, you or your son, right?

--- Quote templates ends ---

GREG

30:54 Right, right.

DAN

30:56 Okay. So, I know.

GREG

30:58 Yes, I understand if, you know, it's one easier step than what I'm what I have to do with BuildOps, but, yes.

DAN

31:07 Okay. Gotcha. And I won't mention again that BuildOps, you know, hasn't been able to get you up and running for an entire year. But so of course, we're not really sure if it works or not because I have heard, I'll tell you. I've met with contractors for

the last three years and I've heard differently about the way that, their system works to deliver what I just explained, but we can take them at their word, I guess.

--- Deficiencies ---

DAN

31:36 So this is what you're looking at is a deficiency report. So that's when the tech goes out, right? I think you mentioned it's a green sheet for yourself. You're taking writing up. Yup.

GREG

31:48 Go ahead.

DAN

31:48 So, this is gonna come back to you in the office pictures tag to the asset and quickly get a quote out to the customer that looks something like this, right?

--- Customer engagement ---

DAN

31:56 With a one click approval. Obviously, this will be your branding photos built in automatically easy to approve for the customer. So we're going to walkthrough that process in detail. But really, the main goal here is to drive that pool through revenue for you.

GREG

32:13 Yes, that's the ultimate.

DAN

32:16 That is the ultimate goal that, that's your goal as well.

--- Customer engagement ends ---

GREG

32:20 Yeah, that's yeah. Okay. It's it's every maintenance or anything that breaks down. You know, the whole idea is to get the quote out to them ASAP. And then it stays fresh in their mind. And then if they decide to pull the trigger... we have the opportunity right there in front of them. You know, you take the, what's the word, you take the emergency away and everything stops. Yup... a better term.

--- Customer engagement ---

DAN

32:52 You take, you take the emergency away and your business can run a lot smoother, right? Without emergency calls and your customers will be a lot happier

without emergency calls. So what service trade is able to do is share that information with them, provide that information with pictures quickly in front of them, that tells the story of why you're recommending this to them.

--- Customer engagement ends ---

DAN

33:14 It makes it easy for them to say yes quickly. So you're not faced with those emergency calls when the equipment breaks down or so on and so forth.

DAN

33:27 So what I wanna do is start here. I'm gonna go into the system. Now, at this point, this is service trade on the back office view.

--- ST app contracts and pricing ---

DAN

33:35 So what we're looking at here is a contract with the customer. Now, okay. This contract, you're tracking this throughout the year to make sure that you're making money off of this customer. Your expected margin was 40 percent. You're actually making a lot more this year on this customer invoice revenue to date, your expected revenue. Now, this can apply to multiple, you know, customers across, you know, let's say you have a corporate customer with several locations, right? You want to apply that across all of those locations. So that's how we've applied that today, different pricing rules can be set up different markup rules based on your contract that you sold them, right?

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

DAN

34:19 So once you use our sales management tool to make that sale win the agreement, you're gonna push it over to service trade and execute on the agreement.

DAN

34:31 You mentioned a couple of times needing to see cost analysis margin. What are your thoughts on this page so far?

GREG

34:40 Right. I mean, that's this is the contract. So this is like a PM contract, correct? That's right? That's that's you know, that's what I would love to see. I'd love to have definitive. No, I need to have the filter list. I got to be able to tell it to the mechanic. I gotta be when it's generated. Now, does this auto generate?

--- Assets ---

DAN

35:07 It does. So what we'll look at next year is this customer?

GREG

35:10 That...

DAN

35:11 That's what we're going to look at next. Yep. So this is your customer and this is where the more detailed information about the equipment and the assets and such are. So you've got the equipment here. This is the assets that you service for the customer. You can see very detailed equipment information, belt sizes, filter sizes. So your equipment, once you, when you're setting up that proposal on our sales management tool, you'll set up services per piece of equipment, like we talked about a few minutes, right?

--- Recurring maintenance ---

DAN

35:44 So now we've got quarterlies that are due for example, for these four to five different assets and they've got a service window upcoming. They've each got their own specific checklist of things that need to happen and you'll be able to run a report... to generate a job ticket for each service. So when those are due, I want to run a report for everything due in December for example, or everything due in January. Here's. Our job ticket automatically created with the belt sizes and filters automatically added.

GREG

36:18 And you run that report globally on everything.

DAN

36:21 You can. So you would run it for all of your customers or you could filter it down a bit and say, hey, I only wanna look at this type of equipment or this type of service, that kind of thing.

--- Assets ---

GREG

36:38 And...

DAN

36:39 Does that sound?

GREG

36:40 Good. Yeah. So far? Okay, ahead.

DAN

36:46 So, and I wanna take a second level look at the asset here, right? So it sounds like what we're doing is we're accomplishing tying the services to asset. We've got the correct tasking, the correct parts to those assets already. And it automatically includes those on the work order when they're upcoming automatically reminds you that those services are due. So if we drill down and take a look at the asset, you can also see all the specific jobs that have been related to this piece of equipment since you started working on it or since you installed it, right? So these are all the jobs deficiencies. So those are repair opportunities. You're all the repair opportunities linked specifically to this piece of equipment, you might have a building with 100 pieces, go ahead.

GREG

37:30 That's based on that's all based on the, that asset was selected when the job was made... or the mechanic, when at, well, we're talking about PMS. So how we're just talking about how you were talking?

DAN

37:47 About...

GREG

37:47 Your, you go ahead. This is a PM.

DAN

37:53 Just an asset record now.

GREG

37:55 Okay. An asset, so.

DAN

37:58 The asset can have anything tied to it, whether it's a PM, a repair, a replacement, a new install, it doesn't have to be a PM tied to the asset. So this...

GREG

38:08 That's because it was selected when the job was made, correct?

DAN

38:14 That's right? It's...

GREG

38:16 A service, you know, PM is already going to be there. But if it's a service... and we don't have the asset number in the house. But yeah, we have the mechanic click on the asset when it gets there, then everything that's done on that asset will have a definitive of what was done when it was done. And all the other cars and everything else that went with it. Okay? Now that's right? And, and I'm relying on my mechanics to select the asset so, that information. Now, how does it work when you have

multiple assets and you want? And you get guy goes there, like I said, he goes there to the customer and he's going there. For one thing, he selects that asset. But then the customer comes is I need to go work on this.

DAN

39:05 Yeah. So let me show you how that works. So here's our job ticket. This is from the technician view. So back at the office, you saw I had a, at a PM that I generated with only three pieces of equipment on it, right? So this is that same job ticket.

--- Tech On-site ---

DAN

39:22 We've got the three pieces of equipment and three services that are due. So I'm gonna punch in, I'm gonna send you a notification, let you know that I'm on the way there you go, Greg. Nice way to put your brand in front of the customer. And then I'm gonna hop in and get to work.

--- Assets ---

DAN

39:38 So here are the three services. Now, like you said, something popped up that is not related to these pieces of equipment. So here's what I'm gonna do, I go to my assets... here's, my appointment assets. I can also look at any related asset at this building. So I have access to all of the equipment records at this building at all times. Okay? I can open up no matter if it was on the work order from the start or if it never even existed. I can open up the.

GREG

40:13 That's okay. So no different than if my guy is, it's the same thing. I'm telling you that. So my guy goes there on a service call, no, on AC one and he selects the asset. He types all the information. And then customer says I need to go look at that chiller over there on that same route. If he doesn't select, the piece of equipment, and all he does is put the notes in completion notes on the work order. It won't track that information to that. He has to select that piece of equipment, correct?

DAN

40:56 That's right? Or I mean, you could update it later. And so what, when they say I need you to go over there and look at this asset? What does it? What does that typically entail? Do they just say, hey, this is having trouble as well?

GREG

41:10 Yeah, go over and take a look at this on.

--- Deficiencies ---

DAN

41:14 So here's what we would do to find to this is the workflow we've created specifically for these types of events where we've got an issue over here as well. It might not even be something that, you know, was on the job ticket or whatnot, but we're gonna add a deficiency. So this is the green sheet that you're talking about and it's gonna prompt me to automatically select the correct asset. First thing I'm gonna do though is say killer was having an issue here's. What I found that's my description. It's me to take some photos. So I might do that first, take a quick photo, add this, take a quick video, tie this in as well. This is obviously gonna pick up audio. So it's gonna explain to the office or anyone that needs it, the information they need. We'll select, hey, the chillers down. Then I'm gonna tag the asset. So it prompts me and make sure that I select an asset here. Now, if I scan the name plate or start typing in, let's see. I don't think I have a chiller here. So I'm gonna go with a boiler.

GREG

42:14 Yeah, that's fine, man.

DAN

42:17 Okay. So I tag the asset. It makes me do that. So the tech cannot forget to do it. And this is the easiest way for me to report what I did. And here's my proposed solution here are notes about my proposed solution. Does that look useful?

--- Deficiencies ends ---

GREG

42:37 Well, that, that's very, it's the same... well, it's actually a little bit better than at this moment. I don't know because we haven't gotten into that heavy part of BuildOps yet, but, it flows really nice. Yes. Okay.

DAN

42:59 You know, that's I'm really glad to hear that. That is probably why our customers continue, to sign up with us and continue to come back to us is that specific feature set.

--- Quoting ---

DAN

43:12 And I do know, that we really are the only ones that do it exactly like this and are able to deliver it the way you're about to see. So I wanna take you through the quoting process from there because I'm guessing once the technician reports that what you're looking for on your end is a report with all the information that you need, to quote the customer or let the customer know what the next steps are.

--- Deficiencies ---

GREG

43:33 Correct.

DAN

43:35 Okay. Well, here's, that report, it's already back at the office for you fillers, having an issue here's. What I found this is, but we just reported Dan still in the field. He's still plopped into the job. He could still be, he could be smoking a figure it out back.

--- Assets ---

DAN

43:50 Maybe you met somebody, nice to talk to in the park and a lot, you don't have to wait on it. You've already got the information that you need. It's, pulled all related deficiencies about this equipment up here for your review, right? So if it's relevant information, we want to make sure you're aware of it.

GREG

44:07 No, this was done on a maintenance, right? You, you've set this up to where it was done on a maintenance on something else associated job. Blah blah blah, it looks like preventive maintenance job, blah, blah made when you did all that or is it tied back to this?

--- Deficiencies ---

DAN

44:29 Going to be tied back to the report originated from the job that you sent him out to do, right? So, this report is going to be tied back to that job. So, you know, who, and when it was reported that's correct, is that?

GREG

44:47 I just, I'm trying to get it straight in my mind how it works.

--- Quote templates ---

DAN

44:52 Okay. But from here, so I've got the asset information. I know which customer it is. All I need to do is add to a quote. And I think you mentioned that the dispatcher, right? Is doing some of this. So she doesn't have to fill out anything. But hey, sometimes the text notes might be a little funny, so I can make adjustments here if I need to. But for you, go ahead.

GREG

45:19 No, go ahead. I'm just going.

DAN

45:22 Gotcha. So I've created the quote. And now, since you've probably got, some common repairs that you offer, right? Some, some things that are similar to others. Okay? So compressor replacement, it might be something that you do. Often, you

can create a template and apply as many different templates as you want in the system. So whenever they come up, you can just apply the correct template, the correct parts and items will fall in based on the asset and the equipment type and the service that you're offering the correct are up rules, for the price for the customer will automatically fall in based on your pricing list for them. And of course, hey, if this is a little bit different than the other compressor replacement, maybe I wanna add a part or some time, I can make adjustments here, Greg, but I don't have to. So we've got our margin the total here margins being displayed and that's it.

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

DAN

46:19 I'm ready to get this quote out to the customer, just like that, right? The picture and video already tied in. I didn't have to go looking for them anywhere and I can send this to several contacts or just one, whichever I need. And that should be in your inbox. So within minutes of having that report from the technician, the customers presented with a branded quote with a one click approval process making it really simple for them to say yes and all of the information that they need including pictures in video that explained the issue.

GREG

46:54 Right. Okay.

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

GREG

46:58 Next, and excuse me, this is done on a separate quote... or a technician puts all that information in and this is drawn up on a quote. If you were to go back, if this is what the customer see, this is what was e-mail so go back one layer.

DAN

47:22 Back to what you're saying on your side?

GREG

47:25 Yeah. So this is what this is what my girl in the office would do that's right? Generating now, the customer is not gonna see my cost and not maybe pricing. And, but we'll see the sub total at the far side, right?

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

DAN

47:43 So, they can see, I think in this particular one, I sent this out to be, where is my pricing? So what you can do, I think that I must have had, I'm gonna make changes here. So there's 12 different ways to present this to the customer. And as terms of a look at that, I selected no totals.

--- Quote templates ---

DAN

48:04 So you can do line items with grand total only or you can do all the time materials, right? So you can price it out how you'd like to. I'm gonna do that line items with grand total only. And I'll resend this. That's a good catch there. Typically, I don't accidentally select that one.

--- ST app contracts and pricing ---

DAN

48:22 But if you wanted to have line items as well, Greg, you could have those show up for the customer as well.

GREG

48:26 Right. Well, it is in California, it's if I do pricing like this, I only pay the taxes on the cost of the material. If I do a line item, and I have to show the tax on the marked up price, you have to show the market up pricing, you have to show the taxes on the state.

--- Quote templates ---

DAN

48:56 So that's just how you would set your standard to be then. So out of those 12 options including whether you want to show tax or not, right? When you set your account up, you would just set that up to be the standard way that you send quotes. So every time that you quoted, it would automatically show those items, right?

--- Quote templates ends ---

DAN

49:14 So, Greg, do you have a second screen or maybe you've got a phone that you could open up that quote on your end and take a look at it for me.

GREG

49:23 Yeah, I have a second screen.

DAN

49:26 And if it looks good, maybe you can even hit approve.

DAN

49:34 Got...

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

GREG

49:34 Two from you.

GREG

49:39 For approval... it doesn't have... pricing. 10 would be with pricing.

DAN

49:53 Yeah. Maybe I need to resend.

GREG

49:57 No. Hold on.

DAN

50:01 Did you click on the link? I think it, there we go. Yep.

GREG

50:04 I just did it here's. A grand total here's. The picture, this is what the customer would be saying for a better term that's right? And all they have to do is... hit approve.

--- Quoting ---

DAN

50:18 That's right?

GREG

50:22 He's confirmed the improve quote. I look.

GREG

50:31 Now, where does it go? It's been approved?

DAN

50:34 Yeah, I see that. So you'll see on my screen that it's been approved and I've also got your purchase order number tied to the work order already as well as you can see here, I can even see when you viewed the quote and when you approved it, so that information can be really important because with the quote dashboard here, I can track all of my quotes that are out to customers and whether customers have viewed them, what status they stand, right? If, if maybe your office girls just drafted some quotes that you still need to review and send out. But we can bulk send out reminders to customers and follow up with customers, make sure that we are... staying on top of them, and, you know, tracking those repair opportunities.

GREG

51:23 Okay. Yeah.

DAN

51:27 Right. Well, Greg, I know.

GREG

51:28 They've approved the quote. Now, I'm sending the guy out there, run me through.

DAN

51:36 Yeah. So from here, we just create a job ticket?

DAN

51:42 And I mean, there's several ways to schedule this, Greg. It's really however you would like to, how do you typically like to schedule these new newly approved repairs?

--- Dispatch ---

GREG

51:52 Well, my dispatcher puts it on a dispatch board for a better term.

DAN

51:57 Gotcha. So that's what she would do. You just take a look at who's available, put it up in her dispatch queue and she would be able to drag and drop and release it to the technician that was available.

GREG

52:10 Cause, we do... it's approved. We put it in an unscheduled folder and then she, when she can get the get it set up, she moves it out of the unscheduled on the dashboard to the service guy or she makes it determine who's gonna do it. And then it gets, you know, assigned to them, and sent to them on their phones.

DAN

52:36 Yep. So your jobs are gonna show up right here... and you would just set your filters how you preferred. So that could be your unscheduled bucket like you just mentioned. And then you'd see the results right here. And then you could further, you could, you know, filter your unscheduled jobs by emergency or by due date, right? By priority, drag and drop those over here into the queue. So, you know, hey, I wanna get these 10 jobs scheduled out before I do anything else and then schedule them to.

GREG

53:08 Right. Can you schedule... a Thursday, Friday off, Saturday, Sunday and Monday on a dispatch board?

DAN

53:22 Schedule?

GREG

53:24 Schedule the job. So you're scheduling my dispatcher says, okay, it's gonna be a three day job, send them out there on Thursday, Friday and he's gonna follow up on Monday. The dispatch board. Does it show it Monday, Thursday, all the way through the weekend to?

DAN

53:39 Yeah, absolutely. So if you wanna look at the week, you can do the week or even the month view... right? So we could schedule this job.

GREG

53:53 What happens, what happens when I need to, something goes wrong and I need to reschedule it?

DAN

54:00 Yeah. I mean, you could move it over just like that, move the schedule?

GREG

54:05 Is this date driven... program at driven... date driven? So in other words... I got a job, it was made on Thursday or the guy goes out on Thursday, but it doesn't show up on.

--- Dispatch ends ---

GREG

54:24 So... if you go back to the job, go go to the job that you just created. Is there a way to make it show up on that calendar, Thursday, Friday and Monday?

DAN

54:39 Yes.

GREG

54:42 And then, so I don't have to move it from Thursday to Friday, just batch board.

--- Dispatch ---

DAN

54:50 So, have three, three appointments on the same job, right?

GREG

54:55 Well, that's how you're doing it? Yeah. I mean, absolutely. I mean, I have to make another appointment.

DAN

55:05 Well, so there's...

GREG

55:06 A...

DAN

55:07 Ways to do this, right? The easiest way, let me go here and kind of give you an example at a job. We've got a service call. When I select this, I'm gonna schedule this job, I would like to select multiple days one, two three. And it's gonna take me eight a. M, it's gonna be eight hours each day. Would that be about what you're looking for?

GREG

55:29 Yeah. So well, exactly.

--- Tech time tracking ---

DAN

55:32 Great job. And so at that point, now you've created a job with eight hours scheduled each day, 15, 16, 17 or whichever days you selected, whichever tech you selected. And a lot of times what we're doing here is saying, hey, we know that this job will take that amount of time.

--- Dispatch ---

DAN

55:54 And so, at this point, when you're looking at dispatch board, now that now, you know... they go up here now, you know, over here and available job that three day job, it's a 24 hour job, right? So when it pops up over here, it's going to point out that you're gonna need to schedule it for three days.

GREG

56:15 But we're gonna have to schedule it, it's not gonna auto populate.

DAN

56:20 I mean, unless, you wanted it to sort of auto populate text, but I mean, yes, you will have to schedule it something really cool that we recently go.

GREG

56:32 Well, if I schedule a mechanic to it for those three days, we'll stay on the on. If, once I schedule it will stay on that guys the day, yes... or do I have to go in and change it?

DAN

56:48 You need to change it?

GREG

56:49 I mean, ServiceFusion, I have to move it from day to day because it's why I asked what is their software is date driven?

--- Dispatch ends ---

DAN

57:00 Yeah. I've never heard of that. That, that doesn't make a lot of sense. It seems like that would be painful.

GREG

57:05 Yes.

DAN

57:06 Yeah. So no, you won't have to move it. It's it's very common for our customers to have jobs that last longer than one day correct?

DAN

57:21 So, Greg, I know we're coming up at the top of the hour here. So it seems like we're that's about as much as we're gonna make it through today. What I did start to build out for you is something that I think you would find helpful. And maybe your son and your dispatcher. It doesn't it sounds like they might be interested if you were to select a different provider as well. So this could be something you want to show to them. But you let me know. So I've started to build out. It's like a resource center, right? So follow up information here and we can talk about what else you might need to look at... from here. Does that seem like something that would be useful for you and your team?

--- Pricing ---

GREG

57:59 Yeah, you can send it to me. I need to, because the next statement is gonna be how much?

DAN

58:05 Okay.

GREG

58:06 Well, that's a great question for you. What's the cost for your software?

DAN

58:11 Yeah, absolutely. So we have three different subscription tiers. So for TAM, with, I believe you said you have 12 field users?

GREG

58:21 Right.

DAN

58:23 Okay. So anywhere from about 12,000 a year, to 25,000 a year depending on what package you went with.

GREG

58:36 So, explain to me what difference in the packages?

DAN

58:39 Yeah. I mean, really, it just depends on what you are looking at. All your customers. Everything that we looked at today is going to be included on the select starter subscription package, which is around 10 to 12,000 dollars, for your team annually.

--- Pricing ends ---

DAN

58:55 Now, of course, there are start up charges. I'm curious, what are you, currently, what you pay for or? I guess what would your renewal be with BuildOps?

GREG

59:05 I don't know at this point.

DAN

59:07 Gotcha.

GREG

59:10 I, that's a discussion that's coming.

DAN

59:14 Yeah.

GREG

59:16 They may not like my decision on what I'm gonna... because I'm gonna hold our feet to the fire for paying X amount of dollars. And it is now like a year.

DAN

59:32 And...

GREG

59:33 We're not live. I pay to make it live and it... so there's issues.

DAN

59:43 Yeah, I'm really sorry that happened to you.

GREG

59:46 It is what it is. I mean, you know, some of it is my fault, but I blame the majority of it. I'd say 85 percent of it. So they're fault, it's not mine. So they should have been pushing me not letting the shit drop through the cracks for mentor. Yeah, anyway, if you can send video, I can look at it.

--- Pricing ---

GREG

1:00:10 I need to know if you can send me something that gives me the pricing for the different packages and what I get for the additional package. Yeah, all the way up to 20,000, the low in 12 in medium, and then high. So, what difference?

DAN

1:00:35 So, the...

GREG

1:00:36 Three packages?

--- Pricing ends ---

DAN

1:00:38 Why don't we do this? Greg? It sounds like what you saw today has, I mean, it'll take care of what you need and it sounds like the deficiency workflow with reporting problems and quoting that to the customer tracking those folks and getting those jobs approved works really well for you.

GREG

1:00:58 I mean, it's I just... your flow rate for adding assets and things to a job is.

DAN

1:01:10 I'm really glad to hear you say that. So... so we're smoother than BuildOps and we've got a ton of customers in your area that are live with our product, which BuildOps cannot say, I'm sure that they've got several customers in the area, that have paid them for a year and are not live. But to me, that's a big concern.

GREG

1:01:30 I look at it this way, I can call all your customers and call the majority of your customers that I know that are in the same end of what I'm in okay industry. And if

they've never had any other company other than ServiceTrade, they aren't going to be able to give me shit for, you know... real evaluation what.

--- Accounting integrations ---

DAN

1:01:55 I set you up with someone that moved to us from ServiceFusion.

GREG

1:02:01 Well, that's a mood point service training ServiceFusion or, you know, it.

DAN

1:02:11 How about one? That from Bill do?

GREG

1:02:15 Now that, I would entertain because they know the INS and outs or what have dealt with the BuildOps program? Okay? That, that is a absolute that would be good. Okay. And that reason?

--- Purchase decision ---

DAN

1:02:36 Perfect. Well, let's see. So, I've got several Greg and so what I would need from you in order to make that conversation happen for you is a commitment to sit down with us again and review that conversation and we can talk about pricing at that point. Something else that I've got that I think would be helpful for you.

--- Type of work ---

DAN

1:02:57 One of our, we recently hired someone, to work with us that sold service agreements and worked for mechanical contractors for the last 20 years. And he has experienced using both BuildOps and service trade and he also had experience using service tighten. I'm sure you've heard of them, but so he's work.

--- Type of work ends ---

GREG

1:03:16 For...

DAN

1:03:16 Several contractors, he's got a lot of great experience using all three of the products, that are most relevant in, the market right now. And so he might be someone helpful to bring onto a follow up call or to speak with you. But I've got a lot of resources here for you to get the answers, that could be helpful for you. I'm willing

to provide them if you're willing to continue the conversation or if you want to continue the conversation.

--- Purchase decision ---

GREG

1:03:41 Well, the thing is like I said, I need to... I need to talk to that gentlemen before I can really make an honest evaluation of your system versus BuildOps. If he's worked on both of them, I need to know that, and then that will determine whether or not I pull the plug with BuildOps and go with you.

--- Accounting integrations ---

GREG

1:04:01 Or in the course I'm on, I mean, I'm sure you have issues in your system just like BuildOps does and work, they're not quite as refined as you are your system, but your system and BuildOps or you can't compare it to service tighten or ServiceFusion. It's just not even close.

DAN

1:04:26 Yeah. I mean, I think you're right?

GREG

1:04:29 I know. I'm right?

DAN

1:04:30 Those are those are.

GREG

1:04:31 I had ServiceFusion and I can't remember, I think I even had service tightened for about... a month. Yeah. And I even had Desco.

DAN

1:04:44 Yes, see. Yeah, Desco, that's it's interesting that I was gonna mention that one as well, yeah.

GREG

1:04:52 Desco is way too heavily data driven way too heavy. I have to hire the fucking people just put in the information that Desco needs... to. It's way too heavy into... accounting driven software.

DAN

1:05:15 Yeah, that's what I hear the accounting driven part of it.

GREG

1:05:19 Yeah, it's a nightmare. Desco is absolutely a nightmare. Like I said, I three people just to put the shit in.

DAN

1:05:29 That you're right there with everybody that. Yeah. Okay.

GREG

1:05:33 Okay. Well.

DAN

1:05:35 I'm glad you don't have that anymore.

GREG

1:05:37 Yeah. I started with Desco and then I went to some other office or service pro or house call pro or some bullshit like that. And then I ended research, and I've had ServiceFusion for almost 10 years. I finally the companies at a point where I need to be more proactive with a shit I've got so.

--- Purchase decision ---

DAN

1:06:05 Yeah.

GREG

1:06:05 And when I talked to you people, you didn't have a three tier, three tier pricing schedule. You were way up there. You're higher than BuildOps. So that's probably the reason why I didn't go with search.

DAN

1:06:26 Okay.

GREG

1:06:26 I'm curious.

DAN

1:06:27 To know how much you're paying for BuildOps because what I could do if you found out that information, right? Is I could recommend a subscription package based on what we've talked about here today that accomplishes everything that you need, but also fits into your budget, right? And then we could talk about the differences whether you wanted to spend a little bit more or if you needed to spend a little bit less, right? We could talk about what differences were there from that. So it sounds like a pricing discussion setting you up with my.

GREG

1:07:02 Before I can even go, I need to know what the different packages are or, and... one of the things I made BuildOps due is they're sending somebody here to train my mechanics there's on the app?

--- Implementation and ongoing support ---

DAN

1:07:20 They coming soon?

GREG

1:07:22 I no, not yet. And, the whole premise of that, is you get into a system like this. It... hands on training is a help a lot better than look at this video. I can't answers. I can't you know, it's hard to get a hold of somebody if from the company that can have.

DAN

1:07:49 It's hard to get a hold.

GREG

1:07:50 Of them. Well, sorry, I use the pain. Okay? Yeah.

DAN

1:07:57 Support is certainly something that is again something that you want out of your software provider and that's something that will have for you 24 seven. You'll also have a project manager that's there with you from start to finish making sure that you go live and you'll have an account manager after that, that's gonna check in on your account, check in on you and understand where you started where you wanna go.

--- Implementation and ongoing support ends ---

GREG

1:08:23 And I mean, like I said, if you can send me something on the breakout of the different things on pricing, you know, and I understand that, that's not necessarily a whole two hold two type thing because depending on how it's configured in like a.

DAN

1:08:43 Yeah. So.

GREG

1:08:44 Well, Greg, and like I said, had, had you guys had this pricing, you know, a while ago... that I may have been with ServiceTrade and not going down this road with build. This is the last time I'm doing it. I'm not gonna change again once this is done. Yeah, it's a deal. I'm sticking with it and that's the end of it. I'm not gonna be

changing it's. Too much of a it's just way too much data that has to be configured. All the crap that goes with.

DAN

1:09:23 Well, Greg, like I mentioned, we, we've been doing this for over 10 years, right? We know your industry, we know the types of contractors that, and what you all are up against, and how much goes into onboarding a product like this and being successful with it. We've done it over 1,200 times successfully. And that again is something that BuildOps cannot say. You mentioned a moment ago. We're more refined than they are. And you mentioned a moment ago that you don't want to change again. Well, service trade had a 90.

GREG

1:09:56 Once, once this is done, I'm not changing again. I, I'm just not gonna do it.

DAN

1:10:03 And we don't want you to that's what we're interested.

GREG

1:10:08 It's been a nightmare with ServiceFusion. I'm not.

DAN

1:10:11 It sounds like a nightmare BuildOps as well.

GREG

1:10:14 Not necessarily. And the only thing with build options is right at this moment, is taking them a year to get me to go live.

--- Purchase decision ---

DAN

1:10:23 Yeah, it seems like paying a year worth of something and not going live. Is, is again, I'm having trouble understanding why that's not more of a red flag for you. But listen, if you'd like to.

GREG

1:10:37 Why do you, why do you think I'm talking to?

DAN

1:10:40 Okay. What?

GREG

1:10:41 What's the whole, why would I, why would I even waste my time and your time for an hour and a half if?

DAN

1:10:51 A good point, Greg?

GREG

1:10:53 Why am I on the phone with you?

DAN

1:10:56 That's a good point. Greg?

GREG

1:10:58 Here's your red flag. Okay?

DAN

1:11:01 Well, so, Greg, we, since we do both have, you know, valuable time, right? And I wouldn't want to waste any of your, what's usually helpful in these scenarios, right? It sounds like you'd like to get some pricing. You'd like to speak to, the colleague of mine who's got experience with both platforms and potentially set you up with a customer reference and I'm sure that you'll have some additional questions. So, what I'd like to do if it makes sense for you is set up a time. Maybe it's next week next Tuesday for us to get on the phone and make sure that you've received the information that I've sent to you and make sure we're coordinating on next steps appropriately in terms of pricing in terms of what you need from me. Does, does that sound like a decent plan we?

--- Purchase decision ends ---

GREG

1:11:46 We can shoot for that, yes, next Tuesday?

DAN

1:11:49 Okay. And would you like to set up a call like this or would you prefer I give you a call, on your phone? How does, how does it work best for you?

GREG

1:11:58 I mean, we really don't have to do... looking at the software? I mean, I've seen enough to understand it. Okay. You have some things in but... so it boils down to what are the packages? How much we're talking? And... yeah, yeah.

DAN

1:12:24 Gotcha. So I'll get some pricing together for you at the latest, share that with you by Tuesday and I'll give you a call. Does eight am or nine am work? Or is that a little bit too early?

GREG

1:12:34 Eight am is doing early for me?

DAN

1:12:36 Okay. Have a not.

GREG

1:12:39 What?

DAN

1:12:40 Was that okay?

GREG

1:12:42 I'm semi retired. So, nine is fine. I try to be here before nine.

DAN

1:12:48 Greg, is your son taken over the business?

GREG

1:12:51 Yes, sir.

DAN

1:12:52 That's fine.

GREG

1:12:54 He's already pretty much got it. He doesn't have time to be dealing with what I'm dealing with. I'm trying to make it... next Tuesday is the fourteenth?

DAN

1:13:08 That's right? So I'll send you an invite for that time and plan on giving you a call at that point. Keep an eye out for an e-mail from me. I'm gonna share a link to this workspace that we've talked about. I've got a few things I'd like to add to it for you so you'll have resources and you can always share this link with your team if the, if your dispatcher or your son would like to take a look on their own time and we can coordinate from there. But it'll have our next steps filled out recording of our meeting today and some additional information.

GREG

1:13:45 We're gonna have to do the fourteenth at a different time.

DAN

1:13:50 That's fine. You let me know. I've got my calendar up.

GREG

1:13:54 Probably, it's probably gonna need to be about one two.

DAN

1:14:00 Well, let's see two o'clock would work best for me if two o'clock is all right with you?

GREG

1:14:04 Yeah, that will work.

DAN

1:14:06 Okay. Gotcha. Well, I will send that over to you here directly.

GREG

1:14:10 Send me a calendar invite or I'll remind myself please?

DAN

1:14:16 Yeah. Let me do that right now.

DAN

1:14:23 Take me one second.

DAN

1:14:48 All right. Should be on the way. So, once the e-mail travels through the wifi, we'll send it over there to California for you.

GREG

1:14:59 Cool. Where are you at?

DAN

1:15:02 I'm actually in North Carolina.

GREG

1:15:05 So... I've got the, or 115, you know?

DAN

1:15:12 Yes, it's 115. I.

GREG

1:15:15 Do have two field.

DAN

1:15:15 Reps... in California though, and I know one of them will actually be up in your area next week. So if it'd be helpful to have her stop by, maybe we can talk about that on Tuesday. And, and if it makes sense, I'll let her know.

GREG

1:15:30 Yeah, that'll work. Okay. We'll go from here.

DAN

1:15:34 Well, great. I appreciate your time today. I hope that it was a benefit to you and I look forward to continuing the conversation. I'll get to work on putting some things together for you on my end, okay?

GREG

1:15:44 Okay. Good enough. All right. Thank you. Appreciate it. Bye.

The End