



# Legacy Mechanical, Nebulosity & ServiceTrade Consultation

Lauren Rice with Legacy Mechanical  
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## Participants

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### **LEGACY** MECHANICAL

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# Transcript

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

KATIE

0:00 Hey, Lauren. Hi, how's Texas?

LAUREN

0:05 It's good. I feel like I've been chained to this.

KATIE

0:10 Yeah. All.

LAUREN

0:15 I've been in calls all morning and all I wanna do is go downstairs and set in sessions, but we're working on closing a deal. Matt and I are, Tim and I had some internal meetings. So I'm like a, that Nancy stage where I'm like where would my skills be best if applied, would they be? He's not working, would they apply right here?

KATIE

0:41 Yeah, like.

LAUREN

0:43 So, I'm like I'm having guilt because I'm not downstairs like rubbing as of people, you gotta prioritize the.

KATIE

0:53 Yep. I hear you.

LAUREN

0:55 How's the stuff going pretty good?

KATIE

0:59 I got kinda side tracked yesterday. I had a call with Ben and I just had some different things on the books and I finished the mobile search. So I'm done with all the certifications. So today's, focus is just on the demo. So I was able to put together some of it, but I'm at the point where I'm like creating different companies in different locations and all of that. So, but so far it's been pretty intuitive which is good. Yeah. So we'll see how the rest of today goes and I talked to Mike and I think

that the same thing happened with him. He got pulled into a couple of meetings yesterday, so.

LAUREN

1:41 Sure.

KATIE

1:42 He was gonna focus on it today as well, which is good so we can bounce questions off each other.

LAUREN

1:48 Yeah, no worries. I'm starting to look at travel for next week and I pinged air systems that I copied you on this morning so that'll be fun. They're part of our peer group. I've got, I think I might have told you this. I have a peer group that kind of materialized and it's like five mechanical contractors that meet once a month, and they're great. They're like probably the top tier of.

KATIE

2:19 Trade users and.

LAUREN

2:21 They're part of that peer group. And so they're just great stewards of service trade, they talk as references. They're well connected in the industry. So I'm excited for you to meet them. And then I realized since we have to be in the bay on Wednesday, but we're driving from Sacramento Legacy mechanical, who were waiting on the way.

KATIE

2:46 Yeah, San Jose, san Ramon. Yeah.

LAUREN

2:49 So what I did this morning was I got a call yesterday and you might have seen in my note.

KATIE

2:55 Yeah, I was gonna ask you about that, Jamie.

LAUREN

2:58 Jamie lewmas, is actually with a read down in San Diego. They're another company in that peer group. She called me and was like, hey, this company was like trying to get a hold of you. They want a demo and I was like, okay, cool. She's like I just spent an hour on the phone with Krista paso, who's the president and he's coming to my office at the end of the month to see how we use the service trade, but he wants to meet up with you guys in the meantime. So, here comes Daniel, but we can ask him about that.

KATIE

3:30 Yeah, cool.

DANIEL

3:32 Hello? Hi to.

KATIE

3:34 Hey, Daniel.

DANIEL

3:35 Hey, sorry, I didn't have time to do hair and makeup. So, you guys are getting me with the ad on?

LAUREN

3:40 So, you actually caught me halfway through hair and makeup URL at the bottom half of my hair and I have to just like fix it.

DANIEL

3:50 Yeah, I know, like, I've been running around like crazy this morning and I'm like, no, I got on Zoom like, all right, well, I.

KATIE

4:01 Hey, it works.

LAUREN

4:03 I'll take you in all your 49 or 40. Yeah. Yeah, cool. Is anyone else gonna be joining us?

DANIEL

4:13 No... I was with the customer yesterday and we... you know, we were just talking.

--- Purchase decision ---

DANIEL

4:23 I told them I was gonna have a conversation with you guys today and, you know, like give me some background on what's going on because basically, I'm a consultant for them to help them kinda through this whole process. So, I kinda like to get you guys up to speed on like what they're looking for, you know, what, you know, a little bit about the company and stuff. So, that way, like when we do jump on with them, right? You're kinda little prepared.

--- Purchase decision ends ---

LAUREN

4:49 That's perfect.

DANIEL

4:51 Yeah.

LAUREN

4:51 I'd already kinda started taking some notes based on your conversation with Ben based on a conversation I had yesterday with one of my clients who I think is pretty closely connected with Chris. I'd like to...

DANIEL

5:07 Yeah, he did tell me about that. I was gonna tell you it was escaping my mind, the company down in San Diego. I think it is right that you work with. So, yeah, so I told him I was thinking up with you because your name came up in the conversation from their customer. And then I said, yeah, I'm talking to Lauren tomorrow.

KATIE

5:25 Lauren's name always comes up.

DANIEL

5:27 Yeah.

LAUREN

5:29 I, I've been at ServiceTrade for seven years, so I've seen the company and the product grow immensely. And then this is Katie mallon. She's new to our sales team.

DANIEL

5:39 Okay.

LAUREN

5:40 But, but she and I both cover California. So we're between the two of us very knowledgeable about service trade and... all things mechanical. So, yeah, I'm interested to hear what brings you to us, what initiatives are kind of top of mind with the service software switch? And yeah, any context would be great.

DANIEL

6:02 Okay. Yeah. So I'll give you a little bit about what, you know, my company, what we do, like, how we like, what, why we're involved in this with, you know, with Legacy mechanical. So I have a company called nebulosity cloud. So we're a full service it company, right? So we do everything from pulling fiber in the ground through deploying ERP systems for customers. Okay. Right. So our kind of thing is we, our kind of niche in the market is really we go work with like an owner developer or CEO, someone like Chris, right? He, you know, is looking to change strategy for the whole company. It doesn't really have a lot of it resources on staff. We come in and provide a service called cio as a service. And, you know, it, right? I act as their

temporary cio for the company, right? So help them with all their it strategy stuff. So, you know, we start looking at like ERP, right? Like, you know, we fix wifi internet phone systems, like all that kind of commodity stuff. But like, really our value is like with the business processes, right? Understanding, what are all your business units trying to figure out the software, right? In this case, we know we need an RP. I mean, they've been working off, you know, three copies of carbon paper for 20 something years, right? Just press hard so we can see it on the bottom copy type thing, right?

LAUREN

7:37 Yeah.

DANIEL

7:37 And so anyhow, so we came on board and, you know, he knows he wanted to do this ERP project. So I kinda said, hey, like the way we do it is... let's do discovery first, right? Like, let me get my PM, let me talk to, let us talk to 30 40 people in the company, right? Like every department, the key people tell us who the key people are that you want their feedback on. So, three weeks ago, we've done that. So we've interviewed over 35 people and we have all those notes and everything right from each meeting which will be helpful for you guys are, when it comes to implementation, if we ever need to go back to like, what did the Construction project manager say, right? And then basically, what we've done is we've taken that and built like a very generic RFP, right? Or just kinda more, I hate to say RFP because it's more of like an informational spreadsheet that we've created. So we're not sending this out to a bunch of people to bid and come back. It's really let's capture what's important to what we heard from everybody from these interviews and just make sure like whatever solution we do, we kinda check the boxes, right? Like make sure the system does all of these things. And if it doesn't do we understand what it doesn't do right? Before we get into buying it because, you know, customers are right, they buy something, they assume it does everything, right? So, so we've done that work already. So which kinda, you know, gives us the kind a like a faster like, hey, I, you know, I'll send you guys the RFP after. So you can kinda just see what's important, but we will notice in there. It's probably zero things on that list are things that you guys can't fix? Like, I mean, we were talking to people that were using a paper process. So it's really hard to not be able to beat that, right? But it's just a good kind of place for us to track stuff, right? So, our involvement in this whole thing will be helping them with the product selection, right? So me being there kind a cio, you know, I'll have a vote in all of this, right? Just from my two cents.

--- Purchase decision ---

DANIEL

9:40 But at the end of the day, Christmas will make the, you know, the final decision along with the controller and other key staff members on the executive team. So what we're doing is like we help do the discovery. Obviously, you guys will probably have more discovery to do training, implementation, nation costs and all that.

--- Implementation and ongoing support ---

DANIEL

10:01 And then really what we're doing on the back end of this project will just be a validation of what you said you were gonna give them that it was delivered, right? So we'll kinda be like checkbox at the end of the project like, okay, yeah, you guys implemented this is working training's, done, right? All of those things. We'll just kinda have some for over oversee the project. You guys go do your thing, implement it, whatever you're gonna do. But we'll just kinda give Chris like the green light that like what you guys said you did in your sow was delivered, right?

--- Accounting integrations ---

DANIEL

10:33 And if there's any technology stuff that you set your software, our systems need to integrate all that stuff. We're there for that, right? Like how does it need to integrate with our office 365 phone system? Like whatever it may be? Those kinds of technical stuff, then those would be things that I would jump in and help you guys.

--- Implementation and ongoing support ---

LAUREN

10:52 Sure. So your involvement is not just during the evaluation selection but kind of after like during the implementation process and.

DANIEL

11:02 Yeah. So we'll check in everyone's mode like, you know, as Progress is going and stuff. And then, you know, whatever milestones we have, right? Like, hey, like we got all the data in. We're gonna start doing training, right? When people start using it and obviously, the care and feeding of it, right? So, you know, how that all works as well? Like who's gonna, who does the first line support? Is that something that my technicians need to learn to help with?

--- Implementation and ongoing support ends ---

DANIEL

11:28 And this, so there's all those kinds of things that we'll figure out throughout the process. But think of us as more of the it department... and project management, right? So we'll just have some oversight for the project, but we're really kind of the it department.

LAUREN

11:44 Sure. How long have you guys had a relationship with Legacy?

DANIEL

11:49 It's really new. So, I met, I know Chris through a Mutual friend... and it wasn't even a business thing. I mean, we were actually a playing golf... and, you know, we just started talking, you know, and me, I, you know, we have specific customers we work with, right? So we're really a word of mouth type of organization, right? So people recommend us and stuff like we don't go out and just kinda advertise or do stuff like that. We're in a very specific of our, what customers we're looking for. So



anyhow, so we just kinda hit it off and, you know, while we were playing and hanging out after and stuff, he was just like, hey, I'm thinking about what an ERP system and you just kinda asked me like, hey, what are your thoughts on this?

--- Purchase decision ---

DANIEL

12:35 Like we looked, so what happened was they started looking at stuff themselves, right? They just kinda went on Google and started looking at things and it looked like, I don't know if it was just timing, whatever was the bat Friday that I met him. He's like, hey... I love for you to like look at this. You know, maybe come to my office and tell me what you think of the software we're about to sign with these guys, right? We have a kickoff meeting on Monday, yeah. And I was like, wow, I was like, well, did you, what did you guys like? How much discovery did you do? And he's like, honestly... he's like we didn't do any of that stuff. Like he's like, we just kinda went through the demo and it kinda check the boxes and we're ready to move forward. And I was like, well, we don't do it that way. Like whatever projects we do, we like to have a discovery phase, right?

--- Purchase decision ends ---

DANIEL

13:23 Like, let us make sure what we're going to help you with is what you actually need, right? We do a lot of sap, right? We're a huge sap partner and you'll be amazed how many companies we've gone into that either selected sap or some other solution for their ERP. And no one did any discovery, right? They just bought it, right? So, hundreds, thousands of dollars on the system and no one asked anybody any questions, right? And then they go to reply and it's like, well, that's not gonna work from your end, that doesn't help. So.

LAUREN

13:59 I think so, basically.

DANIEL

14:00 I told him what our approach was, the kind of shorten this up a little bit. But basically, that day, I told him like this is our approach, like if we were to do this project for you, we would request that we had two to three weeks of discovery, right? And then put a document together, narrow down the field of who's best for the H back world, right? Find the key players, do, you know, do some due diligence on the companies. You know, there's a lot of people that start companies, right? It's easy to go build an app and all this stuff like, you know, you want to know who you're working with, right? How long have you been in business? All those good things. So I kinda told him our approach and then I get a text Sunday and he's like, yeah, I had a conversation with one of my mentors and another company and he had the same approach that you said like he would do different on a project that he just did.

--- Purchase decision ---

DANIEL

14:48 I'm gonna put breaks on this project. And like we want you guys to kinda, you know, how quickly can you start doing a discovery for us? So that's how it all started, right? So we did all that, you know, talk that obviously. So we just to be transparent, you know, this will be the, you guys will be the fourth demo in this.

--- *Purchase decision ends* ---

DANIEL

15:09 So we've looked at, they looked at FieldBoss... Accumatica... build ups and then obviously service, you know, and we obviously want to look at yours and obviously, you guys come highly recommended. Plus what's really important to this customer... mobile app... right? Those other systems are kinda all in one solutions, you know, the FieldBoss and Accumatica all in one type solutions, but you could just tell everything's very vanilla, right?

--- *Access to information* ---

DANIEL

15:45 They do everything but everything's pretty vanilla, right? The mobile app looks a little antiquated, not his thing. And you look at something like, you know, for example, because I haven't seen your guys demo yet, but like for BuildOps, more modern, more well thought out of how the app works, right? From a technicians point of view, right? So, but just seeing what you have in hearing what the feedback that Chris gave me from, you know, his, your guys reference. It sounds like you guys are like they had no problem with the mobile app, like they're saying like super easy to use, well thought out.

--- *Purchase decision* ---

DANIEL

16:23 So that's why Chris is like, hey... let's try to get on the, you know, let's get a demo going with service trade and they come highly recommended and let's see what they have. And then we can kinda let everybody give us a quote and then figure out what we wanna do, you know, start moving forward so they're ready to move to.

--- *Purchase decision ends* ---

DANIEL

16:43 They need this really bad. So, so as quickly as you can kinda rally up the troops, you know, we can get, I can get Chris and the VP of service and controller and everybody into a room and they're really flexible like this is high priority. So I can make that happen as quick as you can.

LAUREN

17:04 Well, Katie and I were actually talking about it. The, all this is pretty serendipitous because we're actually going to be up in northern California next week. So, you guys, yeah, if you guys would be open to doing that first demo with the team on site, we can certainly accommodate that. And I'd love to pick your brain ahead of that call of some of the workflows and things... that you all would like to see.

Obviously the RFP is gonna be super helpful and craft a demo and things like that. But do you think that would be something they would be open to?

DANIEL

17:41 Be fantastic. So, so what I do too is like I said, when we do these demos, I actually go into their office and kinda manage the Zoom call and stuff myself, you know, for them, you know, I mean, just because, you know, they're busy people.

LAUREN

17:55 Yeah.

DANIEL

17:55 So, yeah. So they're in north, so they're in san Ramon, where are you guys gonna be in the bay area?

LAUREN

18:02 So, we're flying into Sacramento Tuesday and... we've got a lunch with one of our clients up there on Wednesday afternoon. We need to be in san Leandro at one, but we would be available as early as eight 30 on Wednesday, the eighteenth to come on site and meet with you all.

DANIEL

18:26 Wednesday.

LAUREN

18:26 Is not gonna.

DANIEL

18:27 Work for me. I'm gonna be.

LAUREN

18:33 That's okay.

DANIEL

18:34 I'm fully booked on. How about this? Can we do Thursday? When do you guys fly out or do you have traveled leave?

LAUREN

18:39 We actually had not booked our travel out yet. So.

DANIEL

18:44 Okay.

LAUREN

18:44 And if Thursday morning works, we could certainly do that.

DANIEL

18:49 Yeah, we could do, I'm pretty sure I can, I let me just let me check with Chris, his schedule next week. I know he's got a board meeting coming up.

LAUREN

18:58 Yeah.

KATIE

18:59 Okay.

DANIEL

19:01 But I don't think it's next week and let me just check with them. I'll let them know you guys are going to be in town. If we can make time for you guys on Thursday. And if he's the only person out of town, we'll just bring him in on the Zoom and then the rest of the team will be in the room, right?

KATIE

19:16 Yeah.

DANIEL

19:18 I mean, he's fine with virtual, but I mean, it'll be great. It'll mean it'll be big, like for you guys actually be there, right? Like that's, yeah.

*--- Access to information ---*

LAUREN

19:27 Even if the mobile app, since the mobile app is sort of like a top priority for this initiative, like here you go. Take my tablet, you go run a job with it.

DANIEL

19:37 Yeah. And we have all this stuff to put it up on the big screen and stuff in the conference room.

*--- Access to information ends ---*

DANIEL

19:42 So, no, that would be fantastic. I'll let him know if he could wait till then if we need to get it on the schedule sooner, you know what I mean? Like if he's just like, hey, like that's you know, like what is the quickest we can do with Zoom call? Like maybe we give them both of those options. I just don't want you guys to kinda miss out on. I think you guys are a solid fit for this. And I, just like I said, the quicker he

gets to see it in real life, you know, the reference is massive, right? That, that's a huge thing for us, right? Like the good feedback that we've gotten.

LAUREN

20:20 Yeah, we can provide as many as you want. I mean, we've been.

DANIEL

20:24 Yeah.

LAUREN

20:24 For 10 years, we've got over a 1,000 customers. About half of those do exactly what Legacy does. So we're happy to connect to you folks in this market and other markets. I don't know if Legacy is part of any peer groups, but, you know, we can, if there's someone in particular you guys wanna talk to, we can always, we can always coordinate that as well.

*--- Type of work ---*

DANIEL

20:48 Okay. One question I had was around the, because you guys are just an FS M, right? Like you're just you're focused as the field service part.

LAUREN

20:58 That's right? So.

DANIEL

20:59 We...

LAUREN

20:59 Do everything from a service and small service, project management standpoint from the sorta origination of the calls, whether it's preventive maintenance, demand work all the way through the billing process.

*--- Accounting integrations ---*

LAUREN

21:16 So like actually sending the Bill to the customer. And then like everything else like from a reconciliation standpoint, is generally done in our clients accounting systems.

DANIEL

21:26 Okay. Integration. So, is it kind of like an open API type of integration? Like, you know, we bring our own flavor of accounting or do you only work with certain providers?

LAUREN

21:40 Yeah, actually I will, can you see my screen? Yeah, I'll send you our API documentation because it's publicly documented. Okay, we have native integrations obviously like Quickbooks, but I mean, for company Legacy size, that's not even a consideration, but we have native integrations with Sage intact. We have partner curated integrations that are customized for each client for like stage 100 C, Sage, 300 cre, stage, 100 mass, 90 computers. We can do accounting connectors with things like Foundation NetSuite. We can integrate with sap is one that we just, we don't work with companies that are large enough to use sap. So that's one we historically haven't done, but we're pretty flexible because our apis are open.

DANIEL

22:38 Yeah, that, and that's what that's what's happened, right?

--- Accounting integrations ends ---

DANIEL

22:40 So, I don't know if you guys know. So like we do like, so we do a lot of sap, but sap is now has a big push into the SMB market, right? So, yeah. So they have what they, so we've been deploying like crazy. So they have it's called for Anna rise and it's a full cloud based solution.

LAUREN

23:01 Interesting.

DANIEL

23:02 Right. Are those?

LAUREN

23:03 Tyingare? They trying to compete with like NetSuite and as?

DANIEL

23:08 Yeah, I think so. Yeah. So we have a lot of customers that use both like NetSuite, sap, Sage, right? Like, you know, just depends on the size of your company which I can afford a big thing, right? But before sap used to be a big clunky expensive dog that you had to have millions of dollars to have, but they, they're making this big move now into the, you know, to the mid market side. And the only reason why we brought it up, you know, I'm not a person to push products on my customers and stuff, right? We kinda just see what naturally happens because we can help with anything, right? We don't you know, we're not, we don't profit from that kind of stuff. It's the consulting we do, right? And Chris was just a big sap guy. So, a lot of people on his team that he brought over when he bought Legacy from Siemens.

--- Accounting integrations ---

DANIEL

24:00 He's been using, you know, he's used sap his whole life, right? So he never thought it was an option because he thought it was too expensive. But with the rise product, you know, it's you know, just from what I've seen, it actually comes in a little cheaper than Sage impact, right? Like as far as monthly reoccurring goes.

--- Accounting integrations ends ---

LAUREN

24:21 Yeah. I remember when Oracle bought NetSuite and NetSuite was kind of aiming at in tax market, they were kinda dropping price too. So.

DANIEL

24:29 Yeah. Yeah. I'm not.

LAUREN

24:31 Familiar with sasap's, back end. They have apis which I assume they would, and it's a.

DANIEL

24:39 Yeah. It's probably one of the most kind of like most customizable type of ERP financial out there. You know, what mean? Like, great with anything, right? And we just, we do a lot of it because we do a lot of stuff kinda in the pro sports world. So, a lot of our customers that do stadiums and stuff, right? They use sap to kinda, you know, to track how many hot dogs they sell, how much beer they sell, you know, how much they should charge for water bottle, you know, I mean, like they use all the, they use all these analytics and stuff inside the system.

--- Accounting integrations ends ---

DANIEL

25:11 But just more recently, they started offering this smaller cloud only product, right? You know, you can't even buy the software anymore. It's all cloud. So not saying we want to go down that path. It would just be interesting. Like I said, as long as there's open API like stuff that information that needs to flow back and forth at the end of the day, it's going to be the controllers decision if she wants sap or Sage or whatever other solution that's out there.

--- Accounting integrations ends ---

LAUREN

25:40 Sure. You may have mentioned this and I just might have missed it. What's the catalyst for Chris and his team? Like looking to do service software and accounting software change out. Now, the specific catalyst?

DANIEL

25:56 So, this is just me with learning three weeks of discovery, right? You know, you wanna kinda be involved with the company for a month or so, right?

--- Paper process ---

DANIEL

26:09 Everybody's doing something a little bit different, right? So... one group of people might be doing a certain way of paperwork. Another group might be a little bit and it's turning into an accounting nightmare, right? Like accounting is just so backed up because everything is so manual, right? That's one thing, right? Just getting the Bill out the door is a challenge, right?

--- Paper process ends ---

LAUREN

26:33 Yeah.

DANIEL

26:34 If inefficiencies like every morning, 65 technicians calling in to figure out where they have to go for the day. Imagine those phone calls every morning?

LAUREN

26:45 Yeah, I bet that.

DANIEL

26:46 Where am I going today? Right? So, a real time app with your board, right of here's, all your appointments, right? That have been scheduled for you, right? You can open your app and probably pretty much know where you're going the night before... being able to. The other thing is, so one is paperwork, right? The paperwork efficiency is gonna go through the roof, right? Once we move to one of these solutions, right?

--- Paper process ---

DANIEL

27:12 Just getting from finish to billing, right? Like getting that work order from getting a customer signature on it to getting it in the billing system, right? The second one like a scheduling, right? Just kind of keeping track of the technicians and efficiencies around tracking time, right? All of those things that are just being done on paper right now.

--- Type of work ---

LAUREN

27:38 Sure.

DANIEL



27:39 I say, probably the biggest one is, you know, they're a big service company, right? So they, you know, 50 percent of their business service, right? 65 technicians, they do a lot of service, right? They're do just as much service as they would do Construction. But the Construction stuff as you know, right? Moves a lot slower, right? Those are slower moving projects where this is 65 technicians out in the field every day doing service work, preventative maintenance work. Yeah, right? For contract, you know, service contracts and things like that. So, I would say that the biggest thing... that they're missing out on is so, you know, like when you go out and do a preventative maintenance, and then, you know, the person there's like, hey, that unit right there is making a bunch of noise like it's not under warranty but like, can you fix that while you're here?

--- *Paper process* ---

DANIEL

28:33 At least give me a quote, right? And that pull through work is huge, right? They do... dollar wise, they do more pull through work than service work. But what I'm seeing is if there was an electronic way to track that pull through work, like to get it to the back office, get the quote out, make sure someone's staying on the customer to sign that quote, figure out if you want the deal lost the deal, whatever... I feel, because that's a paper process.

--- *Quoting* ---

DANIEL

29:06 There's really no way for them to go back like in the moment, they close a lot of work, right? Because they get the quote out customer, maybe the customer executes, you know, within that visit, right? And I'm sure the closure rate there's probably numbers on it if you can get them that quote while you're still there, you probably close that deal 99 percent of the time. If you sit them two or three days later, you most likely probably lost it, right? Are you?

--- *Type of work* ---

LAUREN

29:33 Yeah, that Daniel is like the service trade claim to fame.

DANIEL

29:39 Okay.

LAUREN

29:40 Our data model is structured specifically for commercial contractors that are doing planned and prevented maintenance. And there's actually a concept and service trade called a deficiency. When a tech finds a problem, it's easy for them to document.

--- *Customer engagement* ---

29:56 It's easy for the office or the tech to quote it out. And it's super easy for the customer to approve. We have so much data around pull through work and growth. And we actually did a data study last year studying about a 1,000,000 quotes and the factors that led to the highest approval rates and revenue. So that's something we can definitely be prepared to talk about.

--- Paper process ---

DANIEL

30:19 Yeah, because when I was doing the discovery, you know, just me as a business owner, right? Like, you know, how we do deals right with our customers, when I seen that process and I've seen how much money they make now doing it inefficiently right? Like with a paper process, I'm like that number is got to be double or triple.

--- Paper process ends ---

DANIEL

30:38 I gotta imagine if you had a better way to get that. So that's why, you know, my whole emphasis was like we need to make sure like whatever we buy that, you know, besides it doing what it needs to do like that pull through work is where you're gonna see, you know, a huge revenue spike because you're gonna be closing deals in a more efficient way. So, yeah, yeah. So that I think that's a good thing. Like I think really when we do the demo, what I found was really good. And this is just me telling you like the way BuildOps did it... you know, they just kinda show how you enter in like, you know, the app at the desktop, right? Like the people that work in the back office, but can't be really quick and simple, right? Like people don't need to know that you can spread, you know, you can sort a view by this, right? Like we've been everybody's spreadsheets forever, right? Like, you know, the magic of like I can have all of these in numerical order, right? No one's blown away by that. It's really kinda like, hey, this is what the interface looks like. This is what your dispatch person, this is what your service person, you know, the, you know, your manager, this is their, this is what their dashboard looks like so quickly it is to set up a job.

--- Access to information ---

DANIEL

31:51 And then this is what the technician sees, right? And then the person kinda given the demo of the mobile app like, you know, and this is just me like I said, on the last one, it was very good because the guy who kinda did the demo was kinda doing it from the perspective of the technician, right?

--- Access to information ends ---

DANIEL

32:09 Like what the technician sees is, you know, these are different options you have while you're out there and that's where they were kind of like, you know, out of the three demos we've seen so far, the BuildOps one was by far superior over the other two just in your heads up, you know, I mean, like it just was more well thought out

like it's probably like you guys, if you guys are a service company, right? Like you've thought through that stuff or the other guys were just like, you know, they're all in ones, right? They're just kinda, it has every feature but they're just not each feature is just kinda.

LAUREN

32:50 Sure. Yeah.

DANIEL

32:51 Do you?

LAUREN

32:51 Have any other advice for us on things meet we may want to include in a demo like from a reporting standpoint, or?

--- *Forms* ---

DANIEL

32:59 Yeah. So reporting is key, right? So, I don't know how your system does it, but really the one thing Chris wanted, you know, once we get, let me get closer into like negotiating price and stuff would be canned reports like included reports versus custom reports, right? And can we log in a fee for what reports cost in the future?

--- *Forms ends* ---

DANIEL

33:25 So like he's been burnt and other solutions where they get a handful of reports and then they find out three months later they need these reports. And then he's spending several thousands of dollars because like those are custom reports. We got to get a dpa, we do, you know? So I think the on the reporting side, good clean dash.

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

LAUREN

33:42 For...

DANIEL

33:43 But just kinda maybe understanding that we probably want some type of fixed cost around reporting if you guys charge separate for it.

LAUREN

33:52 Yeah. There's definitely some canned things. There's. Definitely some custom things to your business model. We also offer like technical resource as a service as well. So like a red who Chris talked to yesterday, they utilize that resource. It's they have a technical account manager that they get a certain amount of hours per month

to work on. Really anything. It's not just specific to reports but like give me a honey do list, you know?

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

DANIEL

34:24 Yeah. Got you. Yeah. So yeah, that would definitely be something like, you know, if we, you know, put that in, you say, hey, you know, you can use what you want but that you should probably have some block of hours, right? For customizations or help, right? Because people like the port that we're doing, right? We're going to be like, okay, you can't log in, maybe the password needs to be reset or something, right? We're not gonna go into your system and customize things.

LAUREN

34:51 Yeah, yeah. Yeah.

DANIEL

34:52 Right? Create reports and stuff like that. So, yeah, so I would just, I would just like, so on the reporting side, like I'd be great to show what that, you know, what the dashboards look like. You know, some examples of other service companies and kind of the dashboards they, that people are adapting to what they use because I'm pretty sure... the company down south is, I'm sure they probably want the same reports here, you know, like how many of those ones I've already built in versus how many custom reports have you guys done for them in five years or however long you've been helping them, right?

*--- Access to information ---*

LAUREN

35:28 Yeah.

DANIEL

35:28 So, yeah, I would just keep it like that exactly. I think mobile apps, most important, right? Touch on reporting and then the user interface, right? Because remember the people that are using the user interface at their desktop, those are going to be there more technical people in the office, right? Those are going to be people that work in the back office that are comfortable with computers. The mobile app is going to be for the non comfortable people who are still using flip phones, right? That are trying to do this work that they've been doing on paper for 20 years.

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

LAUREN

35:59 Yeah. We, Katie and I just had a conversation about this yesterday onboarding, folks that historically may not be using technology and... Katie is going through our service trade certification courses right now. So, we've done a lot of work from implementation side of things to kind of standardize some of the training that the

office in the field goes through. And we have some great resources for the technicians that are used to this foot fence. So like.

DANIEL

36:36 Yeah.

LAUREN

36:36 Here's, the course you watch your videos, you take the test. If you don't pass, then you can take it again. And those tend to be the power users because they tend to adopt technology much better once they understand how to use it.

DANIEL

36:51 Okay. Yeah. No, that would be good.

*--- Access to information ---*

DANIEL

36:52 And then, yeah, maybe like, you know, like I said, reporting, you know, so mobile app, you know, the actual app, you know, here is actual user interface that's used at the desktop level, reporting. And then maybe just kinda the approach, right? Like, you know, we do, you know... we'll put a project manager on it, right? Implementation services kinda somewhat look like this.

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

LAUREN

37:21 Sure. And.

DANIEL

37:22 Once we do that, then we do training and, you know, with 65 technicians, maybe we do an onsite training, right? Versus trying to do remote, we bring people into the conference room, you know, one one region at a time or something, right? So, I think just kinda that whole like approach I think start off with like mobile app or however you guys do your demo, right?

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

DANIEL

37:43 If you start in... the desktop app, show them how you create jobs and all that stuff. And then it can translate to like now, okay, now that job is created with the technician will right the end of the demo of that. And then at the end, we talked about the approach of like, you know, what, how you guys implement and then fee structure, right? So it's appropriate to talk about it in this group. These people are all executives. So, you know, like, you know, they like something at the other day. What does it cost me, right? So, you know, is it a per technician thing, you know, like how do you guys, you know, understanding how you guys charge for your software?

LAUREN

38:24 Yeah, we can definitely plan to discuss that as well. When do you think we can expect to receive that RFP? So we can maybe consider if there's anything else we should add to the presentation?

DANIEL

38:39 I guess as soon as we get off here, I'll email it to you guys. I'll send both you guys.

LAUREN

38:44 Perfect.

DANIEL

38:45 And then, yeah, I'm gonna see shares from my team. She's the PM, my PM and she's will be more of like when we're on meetings and stuff, she'll jump on and make sure she documents everything and takes notes and stuff for the group.

LAUREN

39:01 That sounds good. And then once we get that RFP from you, we'll send over the times either next Wednesday or Thursday that we could stop by the office and meet with the team and then you can coordinate with them what time would work best. And then we'll get something scheduled. How does that sound?

--- Purchase decision ---

DANIEL

39:17 Okay. Yeah. Maybe we can get together... after you see the RFP, you know, if you guys want to dive in more deeper or you wanna kinda give me a quick brief of what everything looks like. So like we want to do like quick and fast of what your product looks like. And then I can give you some pointers too, right? To make sure we kinda hit the key thing. So like we can kinda do like a pre demo with me. It doesn't have to be the full thing, but like at least let me see what the app looks like. You're being. And then like, hey, focus on this area of this area because I kinda know like the attention span in there. Like if we try to dive too deep on too many things, you're gonna lose the group, right? And I know they're all looking at their phone.

LAUREN

39:59 Yeah, yeah.

DANIEL

39:59 They're just, you know, the demo is just by demo, right? And...

KATIE

40:05 We'll avoid.

LAUREN

40:06 That if possible.

DANIEL

40:08 Yeah. So I can kinda give you some pointers like just stay on, you know, it's one of those things like, I know everybody loves to talk about all the cool stuff their app does or software, but there's a lot, well, they probably don't care too much about that stuff. They just care about the functionality of it, right? The dive in deeper is gonna be the people who are actually using it.

LAUREN

40:30 Did you say that the audience for next week would be more on like the executive side of things? So probably more big picture is that if I'm reading between the lines?

--- Purchase decision ends ---

DANIEL

40:39 No, Chris is pretty technical. So, yeah, so, you know, he knows what he needs Todd, who's the SVP over the service department. I mean, he's the company forever to.

LAUREN

40:49 Talked with Todd in the past.

DANIEL

40:52 Might be the same one?

KATIE

40:54 Yeah.

LAUREN

40:54 All right.

DANIEL

40:56 Yeah. Yeah. So, you know, he knows what his, you know, he's been in the, you know, he knows, the service side inside out, right? He knows what he wants, you know, for, you know, his organization is probably the biggest in the company, right? With all the, or speed. And then Ileen, she's the office manager. So she's kinda like Chris is admin as well, right? So she's gonna be kinda leading more of the stuff on the sales side, but she kinda has her hands in kind of everything. So Len will be there. Chris will be there. And then Janet who's the controller. Okay? Right? And she comes from a Construction background as well. So.

LAUREN

41:36 Okay, cool. You said something interesting about Eileen. I don't wanna gloss over. You said she's leading the stuff on the sales side. Is there like a dedicated sales team that goes out and sells these maintenance agreements? Is that what you mean?

DANIEL

41:48 I think they just hired somebody yesterday. I think I met the salesperson yesterday when I was in Chris office.

LAUREN

41:55 Yeah.

DANIEL

41:56 So, yeah. So there's definitely like, you know, you guys, you know, there's a CRM portion of this. We don't that was when you look at the RP, the CRM part is probably phase two. But if you guys can do like a sales piece of this, you know, we don't have to cover it if we don't have time, you know, it's not the decision maker for this phase one, but... it's definitely something like phase two. Like there's other things we probably wanna do with your system, but it's just, the most important right now is the field service piece?

LAUREN

42:31 Yeah, definitely. We'll make that. The main focus. The reason I thought that was interesting and it all kinda ties in perfectly because you mentioned that Legacy was purchased from Siemens. We actually just acquired a company called Northboundary, that special in preventive maintenance proposals.

DANIEL

42:52 Well, no. Sorry, I meant to say is... Chris and Ileen actually used to work for.

LAUREN

43:00 I see.

DANIEL

43:00 Yeah. Yeah. Chris bought Legacy a year ago.

LAUREN

43:04 Okay.

DANIEL

43:05 So, he's a new owner. Yeah. So he bought this business a year ago and is, you know, is basically taking it and revamping it right now. So he, he's the new owner.

LAUREN

43:15 Got it. Well.



KATIE

43:18 He...

LAUREN

43:18 May know... the guy who founded Northboundary, sent Google because worked at.

DANIEL

43:26 By does, yeah, he was at Stevens for a long time.

LAUREN

43:29 Interesting in.

DANIEL

43:33 Small world. It was funny because I was in there to, before I started this company, I worked for, you know, I've worked in it corporate for 22 years.

LAUREN

43:43 Yeah.

DANIEL

43:43 And I work, used to work for Washington Mutual bank. And then at some point, I ended up working for Siemens through that account, right? Like I ended up, I worked with Siemens for a little bit of time to such a big company, those guys do everything.

LAUREN

44:00 Yeah. My connection to Siemens is that they do all the inspections and service on my building on my part.

DANIEL

44:07 Okay.

LAUREN

44:08 That's my connection. Yeah. Well, I don't have any other questions. Do you have any other questions for us or Katie? Do you have any questions?

KATIE

44:16 I actually did have one question now that you've gone through, you know, three of the demos. Was there anything that like was missing from all of them that you guys kinda walked out of the room? And you were like my gosh, if it would have done this, that would have been cool or anything that, you know, wasn't there that, you know, if we can provide, we can kind of highlight for you guys?

DANIEL

44:38 Yeah. So, I'd say like the first two demos we did like with the, I kinda use the like the all in one solutions, right? Where they're doing fill, service, accounting, everything in.

KATIE

44:49 Doing everything a little bit but nothing's super well.

DANIEL

44:52 Yeah. So I would say with those ones, the problem with those like it's great like, you know, when you look at it from a marketing document like it does everything right? And you're like it's pretty cool. I have to buy two systems, but the both of those systems, I was not blown away with the mobile app. I was, you know, my opinion to Chris right away, was... it's okay for me? And you like people who under, you know, who are more technical and use apps all the time on our phone but not very intuitive and very old school, a lot of links to click a lot of screens to refresh a lot of having to click save when you're done like... those kinds of things were kind of like the turn off to that because it's like, okay, well, you do all these other things but if the mobile app isn't efficient.

--- Access to information ---

KATIE

45:45 And...

DANIEL

45:45 Easy to use, it's not gonna be worth us doing it's. Not worth us going down that rep because our whole thing is to get our 65 plus technicians using this mobile app, right?

--- Access to information ends ---

DANIEL

45:56 Getting us the data electronically. So I say that would be the biggest thing. And just from what I've seen like online, looking at your website and stuff like you guys definitely have a modernized mobile app. So I'm not concerned about like your actual technology and I'd say one of the other things that happen was in one of the demos was kinda dove a little too deep into stuff like... sorting views and this and that like, you know, like typical excel stuff that all of us know how to do and.

KATIE

46:30 Okay.

DANIEL

46:32 You know, people in these demos don't wanna like, they know they can sort a view by.

KATIE

46:36 Right. Open.

DANIEL

46:37 And close and stuff like that's not a new feature, right?

*--- Access to information ---*

DANIEL

46:39 I mean... so I would just say like that kind of stuff like just when we dive, don't dive so deep into one thing like where you start getting into like the day to day activities, the one that dive deep into would be the mobile app.

LAUREN

46:56 Okay. Okay.

DANIEL

46:56 Right.

*--- Deficiencies ---*

DANIEL

46:57 Click on this. Like, so when the technician arrives, he starts his time, he can pause this time. He can take lunch. He can look up documents. He can scan the plate on the unit, the OCR will populate for new devices. You know, he can take pictures of before after he can send a file, quote request to the back office, the, you know, for him to get a quote back to fix this thing while he's here.

*--- Deficiencies ends ---*

DANIEL

47:22 But, you know, that kind of flow... would be key. And without even like kinda seeing your software, I can't really know just because of the conversation Chris had with the team that we kinda know your, I think we kinda know your app does all those kinds of things like if it's been working for them, I'm pretty sure it will work for them. So, yeah. So I just keep it like that just kinda keep it to very functional stuff like we not get too much into the weeds on any particular thing because you'll lose the you'll lose the room quick.

LAUREN

47:59 Yeah. Okay.

DANIEL

48:00 No, I mean, that's just so people like you gotta say, and like for instance, one of the demos we did, we logged in that they couldn't log into the system, right? So,

like...

LAUREN

48:09 No, the...

DANIEL

48:09 Initial thing was, I was just like it was just spinning. And then I felt bad because like they were probably having some type of systems, you know, thing because like every time I click on the screen, we had to wait like it's I'm like when you're demoing something like it needs to work, right?

KATIE

48:26 To...

DANIEL

48:26 Be a production system or whatever because... it's not a good look, you know, I mean, and, you know, people start checking out right away like this, just like they see that, right? Non technical. People are not going to be like that's a test environment. Yeah, I don't know if I want that spinning well every time I click on something.

LAUREN

48:47 Yeah, for sure.

DANIEL

48:48 So, yeah. So just keep it moving. Don't dive too deep into too much of that stuff like and really just think of when you, when you're when we're doing this, let's really think of the technician, right? Like how do we make the technicians life better with your guys a software?

LAUREN

49:06 Cool.

DANIEL

49:07 Hopefully that's helpful.

LAUREN

49:09 Yeah, super helpful.

DANIEL

49:10 Okay. Yeah. So that's it. So I'll shoot you guys over the rap and then I'll call Chris and find out Thursday morning, you know, we'll just say like nine 30 10 if that works in their conference room in san Ramon.

LAUREN

49:25 Sure.

DANIEL

49:26 And then I'm not sure where you guys are staying like an sack, but if there's you know, if you're gonna, you know, Sacramento from san Ramon is quite a bit of a drive, so.

LAUREN

49:36 We're road warriors, we're used to it.

DANIEL

49:38 Okay. Yeah, I just gonna let you know, most people like they don't know like they'll stay in Sacramento and then have to go to San Jose and re three hour drive each way.

LAUREN

49:46 Yeah, I'm in Austin right now. So, I'm always in transit. Okay? Katie, according to her has a cousin or a sibling or a niece or nephew in every city, and.

KATIE

50:02 I used to live up in San Francisco. I got aunts and uncles up there. Yeah.

DANIEL

50:09 Okay. Yeah. Yeah. I'm in livermore. So in that area, so it's not too far from their office.

LAUREN

50:16 You got some good golfing in that area? Yeah.

DANIEL

50:20 Do you guys play golf?

LAUREN

50:21 I personally don't I drive carts though, and I do drink a lot, so that's how I, that's how I spent time on the golf course.

DANIEL

50:31 Well, you guys tell me we, Chris is a big golfer, so we could do a demo, and then the afternoon, I belong to a private place out plan. So... you know, if anything we can go out there, play off, have drinks or, you know, we can rent, you know, it's private play, so we can do that as well. In the afternoon. It's up to you guys. I don't know how the weather is going to hold up here and.

LAUREN

50:59 I know how has it been up there?

DANIEL

51:01 It's been a mess.

LAUREN

51:03 Yeah, we're...

DANIEL

51:04 Not used to this much rain this fast. You know, like things are flooded everywhere. Roads are getting jacked up and, you know, I mean, it's just, we're not used to, we can't we're not, we don't know how to handle that much rain that fast here.

LAUREN

51:18 Yeah, we're dealing with similar in, so Cal, but it's not nearly as.

DANIEL

51:23 Yeah.

LAUREN

51:24 But it's been very wet. My dogs aren't loving it.

KATIE

51:28 Yeah.

DANIEL

51:31 Okay. Well, yeah. Like if you guys are up for that too, we could do that. I mean, I have, I mean, we can make a think of it. I mean, there's nothing better than staying with the customer for another four hours. Yeah.

LAUREN

51:41 Yeah, definitely. We'll look at our travel schedule and let you know, but otherwise, let's at least try to get Thursday morning firmed up and then we'll take a look at the RFP. I did have one more question.

DANIEL

51:54 Yeah.

LAUREN

51:55 Monday is a holiday for us. So, we, and then Tuesday will kinda be in transit. If you had time tomorrow afternoon, we could do like a 30 minute, 45 minute

walkthrough of the service trade app for you and... I'd offer tomorrow morning, but I'm flying back first thing, so I won't be available for a few hours.

DANIEL

52:20 Yeah, I'm wide open in the, do you live in California?

LAUREN

52:24 Yeah, yeah. Yeah.

DANIEL

52:25 Okay. Yeah. I have a noon to one as my last scheduled customer call. So anytime after one o'clock I'm good.

LAUREN

52:36 Okay. It's two is two o'clock too late on a Friday or does that work?

DANIEL

52:41 That's perfect.

LAUREN

52:42 Okay. Do you go by Dan or Daniel?

DANIEL

52:45 Either it doesn't matter I.

LAUREN

52:50 Dan? Okay. I'll go ahead and block my calendar so no one else puts anything on it because that's been happening literally every minute today, and then we got your email address, and then... we'll do a quick walkthrough like a high level walkthrough. I'll block 45 minutes. It shouldn't take that much, but certain things cool.

DANIEL

53:19 Yeah. If you want to send me an email with both you guys on and I'll reply back with the RFP too.

LAUREN

53:23 Okay. Katie. Do you mind doing that? And then I'll then we'll plan to catch up tomorrow afternoon.

DANIEL

53:32 Okay. That works.

LAUREN

53:33 All right. Thanks so much.

DANIEL

53:35 All right. It was nice.

KATIE

53:35 To...

DANIEL

53:35 You guys, well, I'll keep you guys posted.

LAUREN

53:38 All right. Sounds good. Thanks again.

DANIEL

53:41 Bye.

*The End*