ServiceTrade Demo with PVBJ Inc

Kurt Dillmeier with PVBJ Inc
Recorded on 1/20/23 via Zoom, 1 hour 32 min.

Participants

SERVICETRADE

Kurt Dillmeier
Field Manager

Emily Whitehurst
Territory Manager

PVBJ INC

Shamari Williams
director of operations

Topics

Transcript

SHAMARI

0:02 I don't think so.

SHAMARI

0:09 Hello? Hey, how are you?

KURT

0:14 You hear me?

SHAMARI

0:14 Okay. Yes, sir.

KURT

0:16 Awesome. How are you?

SHAMARI

0:17 Doing good. Hey, yourself? Excellent, good deal.

KURT

0:22 Excellent. I appreciate your time today. I just was looking at the history and speaking with the woman who booked the call. You've had a couple of conversations with search in the past.

SHAMARI

0:36 Yes. Yeah. A couple of years ago, we're when we were looking, yeah.

KURT

0:43 And it's...

KURT

0:46 Sound like you're close to making a decision with build out that you wanted one last kinda look at ServiceTrade and make sure you're making?

SHAMARI

0:54 Decision. Yeah, I wanna see if anything changed since the last time we last spoke, you know? So she had her due diligence, she reached out. So I said, let, you know, let me just take another look at it and see, you know, what you guys have, what changed and just take a peek awesome.

KURT

1:14 Feedback in. It sounds like since we last spoke, has the entity broken away from the larger one?

KURT

1:23 And, and it's...

KURT

1:27 Standalone service division.

SHAMARI

1:30 So, we're mostly service and we do about say 10 percent in projects and stalls and stuff like that. We have a building automation division. We have a plumbing division. So, a couple of other things going on here, but just looking for something that, you know, compass everything that we do here. Yup.

KURT

1:53 Nope. Got it. I just, sometimes it's helpful if this was part of the larger.

KURT

1:58 Entity. And now it's been... you know?

KURT

2:03 Worn off for lack of a better word and isolated away from.

KURT

2:06 The, the other entities and...

KURT

2:10 Only focus on service. You know, we connect very well with.

KURT

2:14 That...

KURT

2:16 Service only.

SHAMARI

2:17 Okay. I guess, so, we do have projects that we run. So we're we have a lot of pros. We have mostly service, but we do have projects here. And there we constantly have projects going along. Would that be an issue or?

SHAMARI

2:32 No, we...

KURT

2:33 We account for that, right? We've got a 1,000 customers, coast to coast and...

KURT

2:39 That in, and...

KURT

2:41 All their specific needs. So, just to step back before we go a little bit further... pro, have you ever heard of pro?

SHAMARI

2:50 Pro core. No, I never heard.

KURT

2:52 So, they're like the 800 pound gorilla in large project management, right? It's called the company, it's a New York stock exchange.

KURT

3:01 We...

KURT

3:02 We started in service, but there was this void between service and pro core, right? That large Construction. And we've you know, maybe since our last conversation, we've built that functionality to account for projects that are six, eight, nine months. We don't really handle.

KURT

3:20 Some of the...

KURT

3:21 Aspects...

KURT

3:24 On the...

KURT

3:25 Larger, I think I forget the specific nomenclature that they use for Aia billing. Okay?

KURT

3:33 But, yeah.

KURT

3:34 Yeah, we've grown, right? We've taken in some private equity money, 85,000,000 bucks the end of last year.

KURT

3:43 And about a year ago, now, 12 months, and right?

KURT

3:47 They looked at us.

KURT

3:48 And...

KURT

3:49 It's a company that only invest in software solutions and... they were quick to.

KURT

3:57 To...

KURT

3:57 Want to invest, you know, they like what they saw an...

KURT

4:00 They feel like we're going to be, you know, standing.

KURT

4:03 When the dust settles, just a question about.

KURT

4:11 BuildOps, what is it about them that you like? And I only ask this Maria just to kind of get a better understanding as to what you might be looking for, so that as we're going through the demo, it would be maybe more sync and I can highlight areas specific.

KURT

4:28 That, that you liked.

SHAMARI

4:30 I like the platform stream, everything's streamlined. I like the fact that they have the Geo location for the guys wanted to check in and check it out of the jobs to like that. I like the fact that you can pretty much search everything from the search keyboard. You could type in the job site or equipment, and, you know, pull that up. I like stuff like that. So getting to the information as fast as possible is, you know, that's key, you know, you're operating with 20 guys. So, you know, each location will have 20 pieces of equipment. And so you're just looking for something you could pull up information as fast as possible or just make it easier for the guys. Make it easy for office, we can use for myself. So, I thought those were the strong, so.

KURT

5:15 And there the app that the text use in the field, do you know, is that a standalone?

SHAMARI

5:21 No, it's all the same. I believe. What do you mean? Stand load?

KURT

5:26 So, is it an app that you, that tech downloads onto their phone?

SHAMARI

5:30 That's correct? Yep. Okay. Got it.

--- Call Setup ---

KURT

5:37 And just curious, did they ever meet with you in person where they willing to arrive on site to?

SHAMARI

5:44 On board?

KURT

5:44 Yeah.

SHAMARI

5:45 Yes.

KURT

5:46 No. But before...

SHAMARI

5:48 Before, no, I haven't met anybody. We've been super busy for the last six weeks, six to eight weeks. So, it's been crazy. It's a good thing. I'm not complaining.

KURT

6:01 No, is good, right? Yep, that is good.

KURT

6:08 Excellent. What am I forgetting?

KURT

6:13 What about social proof, right? Other companies they have on, do they make introductions for you? Are you talking to anybody?

SHAMARI

6:20 Actually, I have a couple of things set up here for the next, it should have been today, but, you know, I got side track with a couple of things here.

--- *Call Setup ends* ---

SHAMARI

6:29 They did send me a couple of references for a couple of local companies here that actually use their program. So they did send that out. I just, it's just been me, I just haven't really set up a time to chat and talk with anybody yet. Yep.

KURT

6:46 Did they any indication of how many customers they currently have?

SHAMARI

6:50 Have you know what? I'm not sure, but from the sounds of it that they started in 18 and they're growing pretty fast, but I, as a number, I have no idea. That would be a question for BuildOps.

KURT

7:05 Yeah, no, it's right? It's just further confirmation, right? Of what I'm trying to sell to you.

--- *Pricing* ---

KURT

7:14 You.

KURT

7:15 Right. If I said we had 10 customers, you might think differently of me if, you know, I told you, I have a 1,050 customers, coast to coast, you know, it's just kind of

that you don't want.

SHAMARI

7:26 Yeah. For me, that really doesn't matter. It for me. What matters is with your software work and is your platform easy to use? And are you reliable? Is it gonna fire up every time you guys need it, that's pretty much that's it, you know?

KURT

7:40 I...

SHAMARI

7:40 Have a track record obviously is, you know, is a plus, I get that.

KURT

7:47 Again, right? We've been around since 2012. We've been around for 10 years, their history, the, you know, it's a bunch of guys that were at service tighten.

KURT

7:57 I believe that, you know, made enough money that.

KURT

8:01 They could walk away from that and invest in their own product.

KURT

8:04 And...

KURT

8:05 We think they got it pretty, right? Listen, I respect the product they deliver.

KURT

8:11 I think.

KURT

8:13 Some of the things I've...

KURT

8:14 I've heard... you know.

KURT

8:18 A... quoting pulse for work, right? The number of steps to get a quote?

KURT

8:25 From it.

KURT

8:26 Notifying that efficiency on the site to getting that back to the office again on the customer, we understand it could be as high as 26 steps. You know, ours is seven steps because when we're focused on service, right? We want to sell as many contracts as you can, as many servers contracts as you can possibly sell. And a lot of times and more often than, you know, I'm not saying it happens all the time, but I hear a lot especially in New Jersey, right? With these... warehouse is going up, a lot of customers will want that business. So they'll pretty much sign a contract that cost, but it's the opportunity to get to that pull through work... that. So, so the contract isn't really, you know, they're not making 40?

SHAMARI

9:15 No, we don't yeah, we don't make money off of maintenance. We don't make money off, we, you know, Dick said this opportunity to get in and we'll find work. They're on out, right?

KURT

9:26 So, if that's one of your most pressing issues in terms of generating more revenue for your firm, I think when I show you our process you, I don't know it'd be nice to, you know, compare apples versus oranges in terms of seeing theirs from beginning to end in orange from beginning to end. But perfect. Listen, I don't wanna waste any more.

KURT

9:48 Time any?

KURT

9:50 Questions tomorrow before I jump in.

SHAMARI

9:53 No, go ahead. Let's see what it looks like.

KURT

9:58 Okay. You see my screen? Okay?

SHAMARI

10:04 I think that's your, yep, I think it's so, yep.

KURT

10:09 Just wanna make sure you're seeing... crypto, a territory manager?

SHAMARI

10:13 Yeah, fair.

KURT

10:14 Okay, perfect. I'm just, I'm splitting screens with my laptop in another. So I wanna make sure.

KURT

10:20 I'm on the right.

KURT

10:24 Okay. So I'm a territory manager for the northeast?

KURT

10:28 This?

KURT

10:29 Is our business hvac? We do have, you know, some fire light safety, but I'll get in a little bit more to that in a second. So dedicated... specific to commercial service contractors, specialty commercial service contractors.

KURT

10:44 That are.

KURT

10:46 Tracking their... contracts that they sold the service contracts that they sold. That's really our focus and that kind of falls in hvac and fire. So of our 1,050 customers coast to coast in Canada. I would say it's probably 85 percent, 85 percent split hvac and fire like safety. And then from there, I think we've got a smaller percentage, you know, plumbing electrical.

--- Pricing ends ---

KURT

11:13 Building...

KURT

11:16 Controls.

KURT

11:17 And, and whatnot... and some.

KURT

11:20 Some lift operators on car lift operators.

SHAMARI

11:23 Okay.

KURT

11:25 So, been around for a decade started in Durham, North Carolina. Our, one of our co founders was that, you know, has always been in software. He was national sales manager at red hat, which was eventually bought by IBM, but, you know, he was working in as in the cloud before people even knew what?

SHAMARI

11:46 What is SaaS?

KURT

11:49 As is software as a service?

SHAMARI

11:54 So, you guys do all of our CM three? Yup. Who else do you have here? So, I'm familiar with will grow you guys use will grow. Yep, that's funny that's strange little grow is pretty local to us here.

KURT

12:11 Excellent. Yeah.

KURT

12:15 The reason why I put this, you know, I spent a little time just pulling from our current customer base and getting that logos in front of you. But, you know, when you look at AI fire, and again, you might not cross over as much with them.

KURT

12:27 Come.

KURT

12:29 California broiler, the complexity, they're in five states on the west coast.

KURT

12:34 I may.

KURT

12:35 In that inventory, which we do for them through partsledger, you know? So as far as people.

KURT

12:41 You know... you...

KURT

12:45 Know, signing a contract with service trade because they've seen the way that we can handle that inventory that complex.

KURT

12:51 I think.

KURT

12:52 Is great. Social proof. A fire as I mentioned, is growing through acquisitions, aggressively coast to coast, a guarding fire is as well.

KURT

13:02 But...

KURT

13:03 I'm glad that a couple of names are familiar to you, but so highly skilled desire to enrich the client experience, right? This is all about connecting with your client base, right? So you can charge a slight premium and you're not going to be undercut by someone that, you know, again, if we go into recession, they're going to be people that are just looking to, you know, get jobs, you know, get business and they might say, well, is more undercut, you know, your current provider by 20 percent and they'll say no, you know, the job that they do the information, I get, you know, I'm happy to pay that premium. They do a great job. So that's kind of our, the basis behind ServiceTrade.

SHAMARI

13:44 Okay. All right.

KURT

13:48 And...

KURT

13:48 Round notifications. So, this is this first experience with the customers. We call them maps, marketing impressions per service. And the more tips you get with that customer, the more they're gonna associate your name, your brand with a higher level of service. So, and route notification text on the way.

SHAMARI

14:07 Okay.

KURT

14:07 Is where you're gonna?

KURT

14:09 We...

KURT

14:12 Basically a digital recap of everything that you did.

KURT

14:17 Any.

KURT

14:18 Checklist. Any.

KURT

14:19 In...

KURT

14:20 Inspection files, all the details of the service, and then any alerts which are basically deficiencies, anything, any ability to generate more work for your phone?

SHAMARI

14:31 Okay. While we're on checklist, so, we have a lot of different customers and they all require different. Everybody require something differently in terms of checklists. Normally, what we do, will, you know, download or print their checklist, fill it out and send it back to them. Now, how would that integrate with your service here? How would we get those checklists on... your app or your software here? How would we do that? Is there some way to edit the software on there or I'm sorry, edit the PDF on your software or re attach it or how would that work?

KURT

15:09 There's there's two ways of doing it. You could either... upload it, you know, with service trade. And basically, they'll take a hard copy, you know, paper copy and convert that to a editable PDF. So that and it attaches to a specific site, right? So there's no real thinking behind the process. Again, we want to improve your efficiency. So, when the tech shows up on site, he's not scrambling for what checklist, right? I, this checklist is going to be associated with this location. So, when he pulls up that checklist from that work order, it's gonna have that editable PDF that he can just kind of run through. We've subsequently for a more complex customers like... the large fire companies that are doing inspections or HV companies that service large hospitals or hospital universities, you know, where... these inspections are taking days. Sometimes weeks, we have an offering called service forms where it can be electronic. Again, it's more advanced than the edible PDF. But basically, it comes up and, you know, I don't know if it's something that you would need. At this point, I think just to answer your question, the edible PDF would suffice. But it's nice to know as you grow, right? We're going to have that ability for you to get a little bit more complex with your potential needs as you grow, if that's something you wanted to.

SHAMARI

16:43 And is this a separate service that it's a separate paid service that you're talking about here? Or?

KURT

16:51 The service forms is.

KURT

16:54 But...

KURT

16:55 The edible PDF is not.

SHAMARI

16:57 How much is that service for?

KURT

16:59 Service forms, I believe is something like, I wanna say like 20 bucks per tact per month. Okay. I can, you know, I have a pricing page I want to show you since you're so far down the line with them. You know, I figure this is my last chance to, you know, convince you otherwise, so.

SHAMARI

17:19 No, I mean, give everybody a fair shake. I think so. I just want to see what you have it. So.

KURT

17:25 Totally understand online quotes. You know, we've called through a lot of data. Any quotes that have three or more pictures associated with that quote are three times more likely to get approved, right? Building managers are not going to have to walk up to roofs. They're not going to have to go in basements, right? And also that trust that you build with the.

KURT

17:43 You know?

KURT

17:44 They're just gonna approve the work because that relationship that exists between...

KURT

17:51 The...

KURT

17:53 You providing that service to your customers sure invoice link... again, as we've grown, our customers have grown and pushed us, you know, to solve for their specific problems invoice link once the work order is done, and the office has the time to review it, basically the invoice link similar to the service link, right? So this blue ribbon here to the service link, the two pages prior.

KURT

18:20 Or...

KURT

18:22 That, you know, if they say, well, what am I paying 1,352 dollars for? Again? Because to your point, right? All customers, you know, have different needs for different wants and a customer might want an invoice one way. And another customer might want a different.

SHAMARI

18:37 Right. You might have.

SHAMARI

18:38 Brand.

KURT

18:38 Total versus someone that wants to line item detail. So you can basically configure it however you want. But the blue ribbon will take you back to the service link. But also what's nice is the pay now button. So all your customers in the us through our merchant partner stacks can pay through credit card or a CH.

SHAMARI

18:58 Okay. Now, is this integrated through Quickbooks? I guess?

KURT

19:01 Yes.

SHAMARI

19:02 Okay. Yup. Yeah.

KURT

19:04 As a matter of fact, our integration into Quickbooks is native and what that really means is they built it to us. So as a service module, you know, there's two ways to build integrations us to them or them to us. You always prefer to have them built it to you. They had gotten so much, so many requests to build that connector that they, that's why it's called native.

SHAMARI

19:32 Got it.

KURT

19:34 And then last is the service portal. What we do is, you know, all the information is yours, you on the information. We just basically store it. And through the service portal, you can provide your clients your name and password for them to access... service history, again, the sections and assets. So, this is a building manager that oversees a couple of different locations. They could have.

KURT

20:01 It set up.

KURT

20:02 To have the different locations. And then under those locations, to your point, these assets, it's so important to have that asset history for the tech on site. So they're not calling someone else calling someone in the office as information that they have.

SHAMARI

20:15 Yep, that's a big thing. Yup. It saves a lot of time.

KURT

20:20 And I think BuildOps has that now.

SHAMARI

20:23 But they...

KURT

20:24 As they were building out there, you know, year ago, it wasn't something that was built into their system. They, you know, we had kinda grown up in that industry and grant, again, I respect everything that they do. But I think now they've done a good job of tracking the assets.

KURT

20:40 But...

KURT

20:41 Wasn't something that was baked in early on anyway. And then deficiency, so you can either request for service through the service portal or again, they can look at deficiencies, or they can actually pay invoices.

SHAMARI

20:54 Got it. There was something else I was gonna ask you here. I just kinda slipped my mind. I didn't write it down... right? But just continue, I'm sorry?

KURT

21:05 So, I think what you'll find is that generically speaking, we're going to be very similar to BuildOps in terms of the efficiency improvement to your current workflow, you know, for the example here's, the dashboard and right? We have...

KURT

21:22 The...

KURT

21:23 Geo locating tracking, right? So, here are these are just salespeople, right? This is a demo account. This is sandbox account.

KURT

21:31 But...

KURT

21:32 Know, our device is Geo locate. It doesn't track where they are, if they, you know, ran to the supermarket to get a loaf of bread for dinner, you know, while they were on a job, it tracks when they clock in and clock out of events.

SHAMARI

21:45 Got it.

KURT

21:48 Again...

KURT

21:49 It's not really important. This is not what I'm gonna sell you service.

KURT

21:52 Right on, but, you know.

KURT

21:54 Got all the information, right to your point, I can search.

KURT

22:00 Up.

KURT

22:00 Here in this queue.

KURT

22:06 And you know, it's gonna pull up everything that I have for a RTH, I was specifically looking for Arthur ash stadium.

KURT

22:12 Or...

KURT

22:14 Anything that's associated with that's got a RTH. So, again, you know, our database, you know, we feel...

KURT

22:24 We're...

KURT

22:25 Very fortunate having been built by people that have the software background and who actually, you know, we were born in the fire life safety space. We've since, you know, expanded eight years ago into hvac, but is it similar workflows, right?

KURT

22:41 Yeah. Have a...

KURT

22:43 You know, it's a technical job. What these people do on whether it's firing safety or hvac?

KURT

22:50 They're...

KURT

22:50 Skilled contractors, right? They're out in the field and they're doing, you know, the work of the service contracts that their company has signed with property managers or building locations, universities, hospitals, whatever it is.

KURT

23:06 And...

KURT

23:06 So... that recurring and ability really to generate more revenue through.

KURT

23:16 You know.

KURT

23:17 We refer to it as pull.

KURT

23:19 Right. These.

KURT

23:20 These, these technicians have an ability, they're the ones that can generate the additional.

KURT

23:28 Out.

KURT

23:28 Through work. And so, we wanna make it as easy as possible.

KURT

23:31 So, then to do that.

KURT

23:32 So, you see here, you know, jobs, you know, scheduling dispatch, service opportunities... any quotes deficiencies? But, you know, I wanna just erase this and get back to.

KURT

23:49 The...

KURT

23:51 The dashboard?

KURT

23:57 So, daily schedule, overdue... jobs without appointments, pass jobs, mark to be complete, completed jobs to be invoiced.

KURT

24:08 You know.

KURT

24:09 Once a tech finishes the job in the field, the job is still open, right? The tech has finished the job, but now it's time for the office to review, make sure time material is

all correct before the quote goes to the, excuse me, the invoice goes to.

KURT

24:24 What was?

SHAMARI

24:25 Other? Okay. Just daily schedule. Okay?

KURT

24:30 So, you can see where your techs are. You know, you can isolate it by, you know, any specific tech?

SHAMARI

24:36 Now, how does the job board work? Is it a drag or drop? How does this work? How do you assign jobs to the, am I jumping ahead here or is this where that would be? How do you assign the jobs to the technicians?

KURT

24:51 I will show you. So, I'm...

SHAMARI

24:52 If I'm jumping ahead that's fine. I...

KURT

24:55 So, I'm just going to go to here's. A location page, right? So, you know, what we have is our customers and we have companies in locations. So you have, I'm sure the concept of a Bill to and a ship to, yeah, right? So our companies are built to the locations are the ship to, are the ship twos, where the work's being performed? So basic, what we do is once we, you know, take a customer of yours and upload them. Then we put in the locations. And then from the location page, that's where here, I'm gonna show you... what our location page looks like. What you're looking at currently is a work order, but I'm gonna show you how we get to the work order. So this is our, this is how our data model works. So here's the ship to Arthur ash stadium. So you've signed a contract with northeast property. So they're the property manager of Arthur ash stadium, right? This is where all the... bills are going to be sent. And I'm just gonna show you how against the northeast properties, right? We can see that they service Arthur ash and quest diagnostics, right? So you can build out all of the locations underneath your, I build two. It makes sense.

SHAMARI

26:30 Yeah. I think you lost me a little bit there, but it's I got a little bit confusing for me.

KURT

26:36 Okay. Okay. So in our customers, right? So, you know, can you give me an example of a customer you have? And who you?

SHAMARI

26:49 So Bill two would be comfort systems and customer would be nice, New York, nice. New York.

KURT

27:01 I comfort systems isn't that New Jersey?

SHAMARI

27:04 Comparat systems are nationwide, okay?

KURT

27:07 Got it. Okay. So in this example, you're going to be doing the work at the Bill to example. I mean, sorry... the ship to would be nice new work. Yep. Right? So in this example, Nike, new work would be... Arthur ash. Yeah, I'll show you. So the Bill to is not these properties. Let's just let me just.

KURT

27:42 Yeah.

SHAMARI

27:46 Customers companies?

KURT

27:51 A customer company. So... comfort systems, right?

SHAMARI

27:55 Yes, sir.

SHAMARI

28:01 Where?

KURT

28:01 Is their headquarters, where is the?

SHAMARI

28:05 Indiapolis?

KURT

28:11 Okay. So.

KURT

28:18 Comfort systems USA, Indiana, this is our... this is our.

SHAMARI

28:26 As you built it?

KURT

28:26 Now, underneath it, I'm gonna add a location, I'm gonna make this... like factory store in New York. I presume that's the store?

SHAMARI

28:39 Yes, sir.

KURT

28:41 And it's at 697 broad street.

SHAMARI

28:43 Yep.

KURT

28:44 Okay. So.

KURT

28:47 Now that's our... to and over here here's our Bill too.

KURT

28:52 You know?

KURT

28:53 I could start billing this out. I could add emails. I could add store number, and then it's gonna ask me all the service lines that we're gonna do.

KURT

29:01 You know, we have a... number.

KURT

29:04 Of options.

KURT

29:09 I'm just gonna come down to... I think I passed the HP and see, yep.

KURT

29:21 S, GH.

SHAMARI

29:24 Is this what we'd have to go through to add the sites... we'll see.

KURT

29:31 Not... and...

KURT

29:34 No, no, no, we're gonna pull it out of your system as it exists?

SHAMARI

29:39 Okay.

KURT

29:39 That's gonna be a piece of cake that's part of the onboarding process. I'm just showing you if you got, if you got a new customer, right? Yes. And it wasn't in the system. I just showed you how you added the new customer, the Bill to comfort systems and you added a location. You and I just did that in one minute.

SHAMARI

29:59 Got it. Now. Maybe I'm jumping ahead again here. Now, as far as the equipment on site, is that the same process of adding equipment to the site here? Like each piece of asset, each piece of equipment on site?

SHAMARI

30:14 So...

KURT

30:15 Just, you know, bear with me. So at this thing of Arthur ash as Nike Newark? Okay?

SHAMARI

30:20 Yes. Yeah. Yep. You got me now? Yeah.

KURT

30:22 Okay. Good. Here. Are assets here. Are all the assets associated with Arthur ash, or Nike or air compressor, air chiller, air, handler, a boiler, commercial truck going tower. Now, again, this is a sandbox account. So, hopefully you have a little bit of imagination, Paul white refrigeration. All right. Let's go one further. Give me an example of.

KURT

30:51 Let me.

                              KURT

30:52 Just see.

                              KURT

30:57 Of an hvac... item, you might add to a location.

                            SHAMARI

31:03 I, an exhaust fan.

                              KURT

31:05 Exhaust, it might be part of the I...

                              KURT

31:09 Equipment group say it's a motor?

                            SHAMARI

31:11 Yep.

                              KURT

31:12 And...

                              KURT

31:13 Trust me we have exhausted somewhere location in the site. I'll say it's on the
roof tied.

                              KURT

31:21 You know, it's carrier number manufacturer carrier.

                              KURT

31:29 Well, speak.

                            SHAMARI

31:32 And all this can be done in the field, right? The guys can do this in the field.

                              KURT

31:36 I'm just showing you exactly how.

                            SHAMARI

31:39 If it's not easy. Enough, these guys are not doing it. And then if they're not doing it then... you know, the software becomes kinda useless. We have problems with these guys just filling out the simplest things, you know, they just want to get on site and work, you know, so.

KURT

31:59 Understood understood. So that's you know, from an office view, I just showed you how I added an asset.

SHAMARI

32:07 Okay.

KURT

32:11 And...

KURT

32:11 If I wanted to... look up a specific asset.

KURT

32:19 Make sure this Nike, right?

KURT

32:26 This is how our database works here's. This rooftop carrier package. There's all the information we have on it, right? We have the, where it's located. It's on the rooftop, the area service, you know, concessions one through 10 right here's. Our Bill to here, all the services that we've performed on this here, all the jobs associated with it, you know, here's our.

KURT

32:51 Or?

KURT

32:52 You are the deficiencies. So this is where you're building that report with your customer. Hey, listen, you know, this age back unit, it's been, you know, you've had it for 15 years. It's nearing it's useful life. We've had to replace, you know, the compressor twice last year, we built it the year before, might want to build this into your budget for the year following, right? Because, you know, your relationship with your, the smarter, you can make your customer in terms of them planning and forecasting for their specific needs, right? This is the type of relationship we want you to build with them.
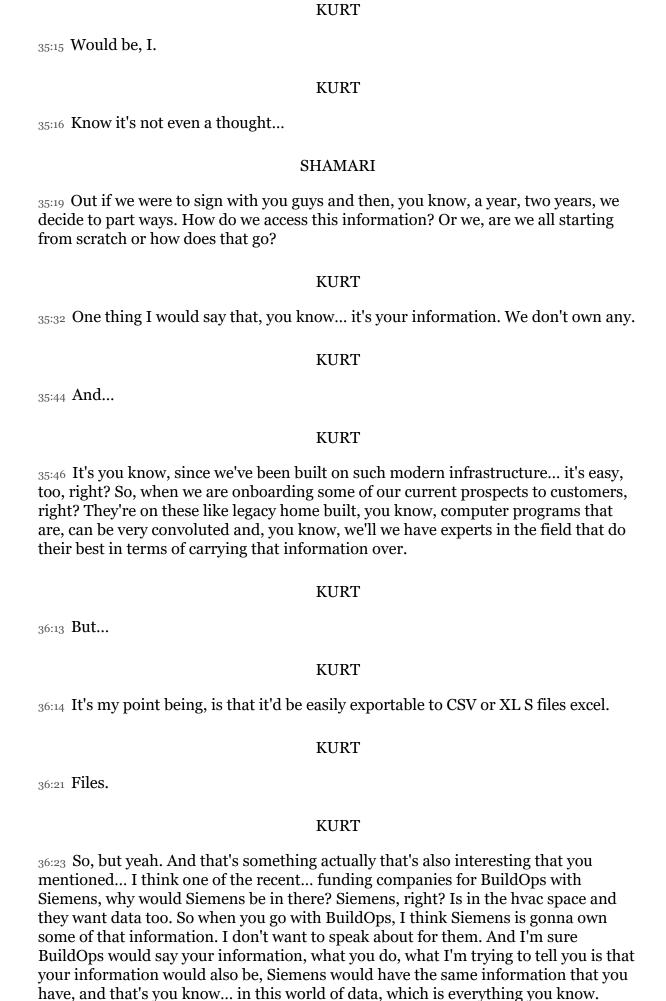
SHAMARI

33:26 Of course, and that's what we're looking to do.

KURT

33:28 Exactly. And that's all that we're about that's all that we want you to be able to do that Amazon is.

KURT

33:34 Like experience.

KURT

33:36 So here, all the deficiencies here are all the quotes associated with it. You can have sub assets related to it, any attachments, pictures. So that's a very comprehensive database behind one specific asset at our Arthur ash.

SHAMARI

33:59 Got it.

KURT

34:03 Right. And the more times you service it, the more data you're going to have on top of?

SHAMARI

34:08 No, I guess that's a question leading into this. How much data can you guys hold for each customer? Each one of your customers, we have a lot of and a lot of assets. Is there a threshold we hit? And then we have to pay extra for data storage or? Okay?

KURT

34:27 Think, I think there's been a comment made to me that.

KURT

34:30 That... I love is that.

KURT

34:33 Data in the cloud is extremely cheap. Yep, right? You know, that's the leverage of a software as a service because you're moving away from server based, right? Having to store these things somewhere, right? And having to pay for storage on those particular servers in a building. And that building could go on fire. You might not have it backed up. You might lose all that data. So now that it's in the cloud, it's cheap. You know, real estate is cheap in the.

SHAMARI

35:02 Right now, it is.

KURT

35:05 Yeah. So we've yeah, you know, and I'm trying to think who our largest or?

KURT

35:15 Would be, I.

KURT

35:16 Know it's not even a thought...

SHAMARI

35:19 Out if we were to sign with you guys and then, you know, a year, two years, we decide to part ways. How do we access this information? Or we, are we all starting from scratch or how does that go?

KURT

35:32 One thing I would say that, you know... it's your information. We don't own any.

KURT

35:44 And...

KURT

35:46 It's you know, since we've been built on such modern infrastructure... it's easy, too, right? So, when we are onboarding some of our current prospects to customers, right? They're on these like legacy home built, you know, computer programs that are, can be very convoluted and, you know, we'll we have experts in the field that do their best in terms of carrying that information over.

KURT

36:13 But...

KURT

36:14 It's my point being, is that it'd be easily exportable to CSV or XL S files excel.

KURT

36:21 Files.

KURT

36:23 So, but yeah. And that's something actually that's also interesting that you mentioned... I think one of the recent... funding companies for BuildOps with Siemens, why would Siemens be in there? Siemens, right? Is in the hvac space and they want data too. So when you go with BuildOps, I think Siemens is gonna own some of that information. I don't want to speak about for them. And I'm sure BuildOps would say your information, what you do, what I'm trying to tell you is that your information would also be, Siemens would have the same information that you have, and that's you know... in this world of data, which is everything you know.

KURT

37:11 It...

KURT

37:11 It's just again, I don't want to speak for them, but I don't know it just kind of crosses a comfort level.

KURT

37:20 Big...

KURT

37:20 Cause who knows what they're gonna do with it, right? Maybe they show up with their own people, right? Maybe, you know, Siemens, you know, decides and you might say, listen, we have no Siemens units, but again, they might then resell that information to carry or whomever it is that's why we chose to go with Ji our private equity investor, but I think BuildOps, right? They've been in that service time and space and they know how they can, you know... when a large enterprise global enterprise invest in their product, they see the marriage that they're creating and how beneficial it could be for both parties and build up. So again, I don't like to, you know, I have not spoken to BuildOps directly. So they might say, well, hey, listen, this is how we have it set up and, you know, it's great for us. I don't know. I'm just trying to think though, you know, speaking with our co founders now that's something that they've had they've been approached by manufacturers and they've turned away specifically for that reason. So back to the... location page. I wanna jump into the field real quick because I think that's extremely important for you.

KURT

38:37 I...

KURT

38:39 Of course, there it is... hiding behind this screen.

SHAMARI

38:46 What the app would look like.

KURT

38:48 So... up here... yes, this is, I apologize. I'm doing a bad job. This is what, so I'll show you what it looks like on the phone. This is the app server strait.

SHAMARI

39:06 Got it.

KURT

39:07 IOS, android, iPad, iPhone works on all. But basically, this is what the tech sees. So... you know, if I went to my preferences here's a picture of the tech. I happened to be my boss. I look hockey so, and...

KURT

39:32 But...

KURT

39:34 You know, I log out of this for demo purposes in the sandbox account, but you can see help center, contact support, right? If they have any issues with the device, right? It's all at their fingertips, right? To your point, right? You want this to make this as easy as possible for them. So if they're fumbling or forget something, you know, all the help is really at their fingertips.

KURT

40:01 What have I?

KURT

40:02 And I just, I don't want to go too fast but you can see opposite preferences are appointments. So again, I'm a technician. And here are my appointments. Now, I filtered by today, but you can see I have upcoming appointments. I also have passed through appointments, but again, this is.

KURT

40:20 All account... again.

KURT

40:24 For ease of use in this top left corner, there's a sort button. I'm gonna press on it. I could sort by due soon. I could sort by priority or nearest. I could also opposite sort is map. I can click on map and it's gonna Geo, locate exactly where I am... and sounds like this late point on a Friday at a quarter to five.

KURT

40:56 Yeah... man.

KURT

40:59 Take a second. But as I zero in on where I am, it's still working.

KURT

41:09 Let me see if I can.

KURT

41:10 Refresh this.

KURT

41:24 My connectivity in this room.

KURT

41:27 And...

                                KURT

41:27 Then closed in four walls, I'm sitting on long island in Nassau county.

                                SHAMARI

41:33 But...

                                KURT

41:33 Basically, what happens is when I use the map version, it's gonna basically tell me the upcoming appointments. This is gonna be, this red balloon is going to be an emergency call, right? So I can see what?

                                KURT

41:47 The...

                                KURT

41:47 Blue will be my service, recurring, service work, and the greens will be.

                                KURT

41:53 You know, one time jobs... but we...

                                KURT

41:58 I like, I have to show you that in a minute, never cool when it doesn't work. But trust me it's point right? About text, making sure this thing works.

                                KURT

42:09 That's...

                                KURT

42:10 The most important.

                                KURT

42:11 Thing I'm...

                                KURT

42:12 Sure. If I walked outside, I could easily get my phone is attached to my computer.

                                KURT

42:16 And...

SHAMARI

42:19 Okay. I can't get near the window right now that's...

KURT

42:22 Gonna do is just click on by today. So filter by today. That's kinda where I am. I mean, before I get there, I just want to show you everything here are the scheduled jobs here. Are my unscheduled jobs here are completed jobs, again, access at the fingertips of the text. All this is configurable by the office, just to be sure, right? So, you know, a lot of times companies don't want text.

SHAMARI

42:46 No, we don't...

KURT

42:48 Yeah, they don't want them to see the next job because they might blow through the work on their current job just to get to the next job. They might have someone, maybe it's a Friday.

SHAMARI

42:56 Right. They wanna get home or?

KURT

42:57 They want to get to the bar, whatever it is they wanna do, right? You can configure it so that jobs are not visible until you've clocked out.

SHAMARI

43:05 That's correct?

KURT

43:08 But I'm gonna click on filter by today. I click on my Arthur. Ash. Now we have three different ways to track time. We do have service time card, right? Again as our text one or our companies, our customers need to track tax time in the field. For payroll purposes. There are three.

KURT

43:33 Right.

KURT

43:34 Categories for the tech might be a job prep on the warehouse. So you can see along the bottom that's gonna be my job prep. I could go to end route. So once I'm done with the work in the warehouse maybe or once I'm completed, once I'm ready

to go to the next job, I'll clock in. What I'm gonna do is it's gonna give me an option to notify the customer. I've got Sama here. Do you have access to your?

SHAMARI

44:04 I do.

KURT

44:05 Okay. You should be getting an email from me relatively soon.

KURT

44:08 So...

KURT

44:10 So once I've arrived on site, I'm going to convert from clocking out and route to clocking in on site. So once I clock out, it's gonna say, hey, you wanna clock in on site? Yes. Now that's going to be that pin tomorrow, right? That pin you saw on the dashboard?

SHAMARI

44:26 Yes. Now.

KURT

44:28 You're gonna see, you know, just... I will show you... I might have to just refresh this page.

KURT

44:52 Clocked in 20 seconds ago. So the dashboard is gonna see it. My pin hasn't come up again, it might be my connectivity, right? You couldn't see me on the pin map. So I'm sure there's again if I wasn't sitting in a room with the closed doors, if I was closer to the window, I'd have a little bit, but what's nice? Is that through all this? And this is, I think very important, right? So being in the cloud, right? Once I clocked into a job, all the work I have, even if I don't have reception, which again looks like it here. It will cash. And what cash means is it won't be lost, right? If I take pictures notes, whatever it might be once I regain connectivity to the internet that's when it's gonna upload, right? So again, you know, we've had is where people are frustrated with, you know, alternative solutions and they said I, and I'm tired of losing work. Well, it's nice to know once you've clocked in all the work that you put into service trade on the work order.

KURT

45:48 Yeah.

KURT

45:50 Will never be lost. Okay? So... I'm here on site, you know, I'm gonna walk you through the tiles, top left to the bottom, right here's my services, right? I can see up

here. I do that, you know, quarterly inspection, prevent a maintenance work. Any attachments, right? I could take a photo.

KURT

46:19 Of my...

KURT

46:27 I could add.

KURT

46:28 Attachments. I could take a video. I could scan a document.

KURT

46:32 I can.

KURT

46:33 Record an audio. Yeah... it's current on site. Love this building, love working on these assets.

SHAMARI

46:42 New and it makes my...

KURT

46:43 Job very easy. You know, whatever it might.

SHAMARI

46:47 Okay.

KURT

46:48 Right.

SHAMARI

46:51 And our customers, I could have access to all this.

KURT

46:56 They can, yes, it's again, what's great. It's all configurable, right? If I took a photo, what's interesting here again? Just keeping the like as theme. Hopefully, you're not a flyer.

SHAMARI

47:10 I apologize. No, not really. I.

KURT

47:15 Yeah. Okay. So you can see visible the customer or not?

SHAMARI

47:20 Okay. Got it.

KURT

47:21 But we wouldn't want to leave that with the text, right? For the tech to decide that, right? So even before this goes to the customer in the form of an invoice or a service link, the office has, you know, right of last refusal or you might say, listen, we're tired of this guy. He curses a lot on his memos, right? Or you take stupid pictures or whatever, you know, you always have an ability to.

KURT

47:50 You know, limit what they can and can't do.

KURT

47:59 Here are my job items... again, parts labor. I might have pulled... a widget from the truck and from here, I can say, you know, I wanna make sure that I identify where I got that part from someone. Say it's a warehouse, but, you know, trucks can be warehouses. So, truck one is my warehouse. So let me just stop for a second here. How are you currently tracking inventory and items?

SHAMARI

48:33 Manually, whatever you guys pick up, they'll send it in. We'll try, we'll keep track of it on excel sheet. So everything we do here right now is kind of a old school. So, I'm trying to make that transition.

KURT

48:49 And in BuildOps, how are they going to track it for you?

SHAMARI

48:56 I actually never really touched on that. I don't think I touched on that at all because the thing is with us, we don't really, we don't really carry much on our trucks or minimum. It's all commercial. So, whatever we need to order and for the job. So we don't really travel around with a whole bunch of inventory. We try not to, because most of the time we end up it is, it ends up going to waste sometimes.

KURT

49:28 Just trying to see.

KURT

49:32 So what's nice though is from this perspective, again, it's all about making sure you're tracking your cost specific to the job. And if your text know that something

has to be ordered, either you can do it in the office, which is a no brainer or, you know, they could, the text could say I need to get it from a part vendor. And actually what they could do is if they were to have to finish a job and run to home depot or Fergus and whatever it is, they can put a po number, you know, select the vendor and, you know, have the status as ordered, not ordered or received. It's very important again to our skilled laborers to be able to make sure that if they're tracking their cost parts labor appropriately, right? They'll understand their margins better... and I think it will be a huge improvement for you guys. I'm not saying that you're not doing it well now.

SHAMARI

50:28 But...

KURT

50:29 You just want to minimize, you know, stuff slipping through the cracks for.

SHAMARI

50:36 Sure.

KURT

50:38 We...

KURT

50:40 We do have a partsledger option on the bottom. You can see open partsledger. It's an inventory management, right? So, right, California boiler. I always use that example, right? They've got, they got four warehouses. They have over a 1,000,000 parts boilers are old, right? They have, you know, maybe there are certain specific items to a boiler that's 50 years old that it's not even manufactured anymore, but they might have it in a warehouse, right? You can see how important it is for them to track something.

KURT

51:11 Like that.

KURT

51:13 Partsledger just to let you know is a better tracking. So again, as you guys continue to grow, maybe it's something you might think about it's. Nice to know if you need it, right? You rather have something there if you need it, but it's currently, it doesn't sound like really it's in a huge importance or need for your.

KURT

51:31 Well...

SHAMARI

51:32 Not at the moment. Yeah. But like you said, in the future, maybe yup.

KURT

51:38 Here are the assets. So again, I go a little bit too quick. I'm gonna go back. So the bottom middle tile is at our assets. And here's this age back unit that I'm working on as once I click on the hyperlink again, this is from the text perspective, I could click on the service history, which is the first line. I could see everything that was done to this. I could actually even scroll through to that specific... job. See any comments associated with?

KURT

52:05 Any.

KURT

52:06 Deficiencies broken compressor? Yeah, that makes sense.

KURT

52:12 I'm just gonna now go back up... any.

KURT

52:17 Deficiencies, right? So this is really what helps your text in the field operate more efficiently. They're great at what they do, but they're somewhat limited at times by the information available to them. If it's available to them at their fingertips, you know, as in this asset history, which I'm sure it's on par with BuildOps.

KURT

52:41 If...

KURT

52:41 It's perfect. Now along the top, you can see this assets specific to this work order. But if I scroll to the middle and said related... I could see other related items for hvac work or if I hit all it's gonna pull every asset, right? So I would suspect I...

SHAMARI

53:02 All the asset for that site or all the assets in the, in our database?

KURT

53:07 No, just for this.

SHAMARI

53:09 Okay. Got it. Okay.

KURT

53:10 The site.

KURT

53:12 You know?

KURT

53:13 I suspect, right? If I were thinking about growing my business, right? Once you get your foot into the door, maybe providing a specific service, it might be controls or it might be hvac, you want to be able to grow your business. And now you're developing that report with them. Maybe you now are servicing other assets within the building. And if your texts, you know, are really good, you know, they might be on site to do something, but the building manager might say, hey, can you take a look at this while you're here? Yep. And if there's a deficiency, it's nice to be able to, for them to be able to, again, with their phone quickly jump to that asset, see the history?

KURT

53:53 And you know?

KURT

53:54 Generate more poor.

SHAMARI

53:55 Work. I agree.

KURT

54:01 I...

KURT

54:01 And to your specific question, adding an asset, right? We're not going to really do it in the office. We prefer not to, we might have to at times as I showed you how we did, but for the tech just a matter of clicking on this hyperlink on the bottom which says, add asset, select the type, right? There's a... plethora of options that I can choose.

SHAMARI

54:27 Yeah.

KURT

54:29 But let's just for... simplicity.

KURT

54:40 Parent asset. If there was a parent asset could be the rooftop carrier.

SHAMARI

54:45 Yeah.

KURT

54:46 Location, right? I'm gonna say it's north west roof. Let me just roof... type. Obviously, this is a... you know.

KURT

55:08 Number and manufacturer model.

KURT

55:11 Installation date, any notes I wanna put... and...

KURT

55:17 I can just save that... and we'll...

KURT

55:25 Back in the...

KURT

55:25 The office in the office view, right? Because it's not associated with this.

KURT

55:32 Should be, what did we put hvac... right there?

KURT

55:40 See that roof pin? I misspeltp.

SHAMARI

55:46 Where, where is? Okay? I...

KURT

55:50 So, middle you see the rooftop package carrier? Yeah. And then that, right? I associate it with a parent assets.

SHAMARI

55:57 Got it. Got.

KURT

56:00 There's a roof. I... good thing we can edit that. So again, very easy... to make sure that... we can track those assets again. So, this is really... this is the Genesis of service rate is okay. I've identified pull through work. I've identified a way I can generate more revenue for my firm. There's a deficiency in the field as I'm on site.

I'm on this work order at Arthur ash. All I have to do these are the steps I do here's. A deficiency. I click it on the bottom. I'm just gonna say add efficiency. We're gonna say it's broken compressor.

                              KURT

56:53 And... I'm gonna now.

                              KURT

56:58 Compressors make sounds right? It's a machine. So, please.

                              SHAMARI

57:02 With me and don't...

                              KURT

57:03 Laugh. Yeah, this machine is making a weird noise wow. Well... I'm gonna try and rebuild the motor. Otherwise, you're gonna have to swap.

                              SHAMARI

57:20 I put a new one in... all right?

                              KURT

57:25 I appreciate your.

                              SHAMARI

57:27 I restrain my laughter... right here's. Our photo.

                              KURT

57:37 I...

                              KURT

57:37 Visible to customer or not.

                              KURT

57:41 Okay.

                              KURT

57:42 We've identified it.

                              KURT

57:43 And we've added...

                              KURT

57:45 Some pictures to it and take.

SHAMARI

57:48 Audio...

KURT

57:49 Recording of it. And again, I could do any number of things, right? I could take a video, right? Even a video, right? So here we are now, there's...

SHAMARI

57:59 My long week.

KURT

58:02 Tower in the corner and the TV which is not... right? So that will double a, and the reason why you're seeing these circles is, again, it's cashing, right? It's not going directly up to... the service trade.

KURT

58:18 My...

KURT

58:19 Connectivity isn't great. Exactly.

KURT

58:21 Where I am right now, so.

KURT

58:24 I'll say it has defects, but it's still operation.

KURT

58:27 We'll say it's on.

KURT

58:30 Carrier unit, it's on the H back service line. It's new. And here is where I can talk to text. Either I'm gonna attempt to rebuild the motor, otherwise gonna have to order a new motor for the carrier. Gonna need a 20 foot ladder.

KURT

58:55 And gonna take me a...

KURT

58:58 I have three hours.

KURT

59:07 That's it. That was step one. I've identified the additional pool through work. I went through the steps to load it up into my work order.

KURT

59:22 And I...

KURT

59:22 Wanna show... you know, again, we can work, we have all of that. We can generate, view more details you ask specifically about.

KURT

59:35 About the.

KURT

59:40 Edible PDFS, right? For the checklists. Yes. So here, I don't wanna jump at, I wanna make sure you're you know, too often people try and, you know, jump and they think they, I wanna make sure I'm going slow enough to make sure that you see how easy it is. So, if I had a checklist on this specific work order, I would just go down to view more details. And once I got more details, I would click on this actions button and I would download link paperwork now... as I told you before, because we have an ability to scan your existing paper documents and turn them into edible PDFS. Once they're associated with a job site, I won't need to find them. I'm just showing you how I do it. Currently... the paperwork would be available on the work order if I had one assigned to this specific.

KURT

1:00:40 Right.

KURT

1:00:42 So, let's just say it's... refringe tracking.

KURT

1:00:51 And... and...

SHAMARI

1:00:56 Onto...

SHAMARI

1:01:04 So, we...

KURT

1:01:06 Right.

KURT

1:01:07 It's it's gonna pre populate the information. It's gonna know where I am, the work order that I'm on... and... the item that I'm pulling on. So it's is rooftop carrier too, knows at this particular site. And then I can.

SHAMARI

1:01:24 You...

KURT

1:01:25 Know, basically move in and move out and do the checklist. I could again, it's editable so I could either write into it. I can check boxes most the time, 90 percent of the time or, you know, it's a checklist, and it just make sure that you've done the work. You might have some readings you'd want to put in there.

KURT

1:01:45 But...

KURT

1:01:46 Once I'm done with.

KURT

1:01:47 Yeah.

KURT

1:01:53 Let's just see.

KURT

1:01:56 Put in some boxes. Some X is here. And once we're done... we're going to.

KURT

1:02:11 Upload to.

KURT

1:02:18 And... send to.

KURT

1:02:25 Servers trade.

KURT

1:02:39 And...

KURT

1:02:45 There's our work. It's gonna come in a little bit screwy. But once we've...

KURT

1:02:57 Sent a copy, we're going to add the service rate.

KURT

1:03:05 Again, it's a sandbox account. I appreciate your.

KURT

1:03:14 Imagination in terms of what that checklist looks like. And there it is pipe.

KURT

1:03:26 What else?

KURT

1:03:26 Any other questions before... I clock out?

KURT

1:03:44 Sorry, I can't hear you too. Well.

SHAMARI

1:03:47 Yeah. Okay. On the.

KURT

1:03:51 I...

KURT

1:03:52 Yes. Yeah, yup. I could, I was clicking in those boxes... are... your voice is really faint?

SHAMARI

1:04:03 This better?

KURT

1:04:04 No, 100 percent.

SHAMARI

1:04:06 Okay. I was saying that on each visit, we'll have four visits for each site, and each time we go out, we have different things to do now. Is that, is this the ease of adding that editable PDF each visit? Or is it just one PDF per site?

KURT

1:04:31 Well, it depends on what the, you know, if you have different PDF, right? So, if it's a quarterly PDF for that particular site?

SHAMARI

1:04:39 Yeah.

KURT

1:04:40 It's gonna, it's gonna populate those four jobs every three months.

SHAMARI

1:04:47 Okay.

KURT

1:04:48 Does that make sense?

SHAMARI

1:04:50 So, it will automatically know which one to send to the guys is what you're saying?

KURT

1:04:56 No, no, no, it's not going to send it to them. It's gonna be... it's connection is going to be to that location into that job, that work order because that work order is a quarterly service. Now, you have, if you have a winter and spring and those checklists are different, yes. Then in that example, either you could have the four different, right? Winter, spring, summer fall checklists. Again, they might be, I'm not specifically sure how those work... and they would just pull down, you know, if it's you know, September, October, that might be fall. So they're gonna pull down the September.

--- Pricing ---

KURT

1:05:41 How...

SHAMARI

1:05:43 How hard or how easy is that to add another PDF to it if needed? Sometimes they'll change it year by year sometimes.

KURT

1:05:53 It's just, it's as easy as... scanning it to a... uploading it to a PDF. And then it's like honestly, I think we charge 100 dollars. It's a piece of cake. Not even, I think it's... what is it? I think 25 dollars per PDF. So once they're...

KURT

1:06:18 And...

KURT

1:06:22 We do it within 15 minutes for you.

SHAMARI

1:06:25 Okay. So.

KURT

1:06:26 If you, if you sign on with service trade, you have an account manager and that account manager, will, you know, they're there to service you? And if you need, you know, some PDF uploaded, they'll have it back to, you know, within the hour.

SHAMARI

1:06:40 25 dollars each PDF?

KURT

1:06:43 You know, if that's something that I hate getting really Petty about that stuff.

SHAMARI

1:06:50 The reason I asked is because like I said, some customers, we have it's a lot, you have one, it's I'm thinking about one specific site and it's probably like five pages per asset that they ask for. So, and that's just one visit. So, I'm just trying to make this make sense for us, you know? So I'm just trying to see, so.

KURT

1:07:15 I will, for being the territory manager, I have an ability to... override some of the charging options. I would give you PDF for free. So.

SHAMARI

1:07:30 Okay.

KURT

1:07:31 It's honestly, I think it's a joke for the prospects and companies that I talk to, right? These are 20 3,000 1,000,000 dollar revenue firms. And to be, you know... sticking them for 25 bucks and a PDF.

SHAMARI

1:07:49 And that's what I thought.

KURT

1:07:53 It's after nine.

SHAMARI

1:07:57 You, who would you say your biggest competitor is? I guess the first question I asked was service trade made just for commercial or is it just start out is something else or you guys transition into commercial service?

KURT

1:08:10 It's a great question. We started 10 years ago specifically for commercial service. Now, I will say, I'm not gonna lie. We started in the fire life safety world, but when you think about what that means and that's why of our again 1,050 customers, we have 90 percent which are split between hvac and fire. It's the same workflow, right? Service contracts. You're servicing H, back units, your servicing alarm systems. I would say that on the fire life safety, it's a little bit more complicated because you have code, right? And all these codes, you have to...

KURT

1:08:56 You know, yeah.

KURT

1:08:58 To pass code otherwise, right? If you have a fire in your building, you are screwed.

SHAMARI

1:09:04 Yeah.

KURT

1:09:05 It's a little bit more nuanced in the fire world, not as much an hvac, but it's the same concept.

KURT

1:09:11 Yeah.

KURT

1:09:14 You have technical guys in the field that are good at what they do. They're doing recurring service, preventative maintenance or otherwise or inspection. They're basically working off of contracts, preventive maintenance contracts or service contracts, and they both have a great ability to generate more pull through work while they're on site, right?

--- Pricing ends ---

KURT

1:09:39 We call it, you know, being on the gold mine, right? To generate that pull through work. So, hvac and fire life safety, when you really think about it outside of the code requirements in fire life safety, it's the same workflows.

SHAMARI

1:09:55 Okay.

KURT

1:09:57 We've been doing it for 10 years.

KURT

1:10:00 Yeah.

KURT

1:10:01 And that's why at first build up, got the asset tracking a little bit wrong. They didn't understand how important that was. We understood that because... for the text in the field to have that service history. So they're not calling the office, calling someone who's been on vacation. They.

SHAMARI

1:10:19 That's a big.

KURT

1:10:21 That is the key to all this.

KURT

1:10:26 Is the...

KURT

1:10:27 Access information so that they can do their job more efficiently, right?

SHAMARI

1:10:31 It is, it is a big deal. One thing they did do now when I do like what they did is that the scanning of the name plate and that automatically populates the asset instead of typing everything in, you know, so that, that's a pretty cool thing they had too. I'm not sure if that's something you guys will offer down the line also. So I forget exactly what the technology is called. But yeah, of course, you're gonna have guys fat finger in information in there.

KURT

1:10:59 Yeah. Hold on one second. I don't wanna... I just wanted to see this one.

KURT

1:11:15 I was reading this customer.

KURT

1:11:19 Shares PDF of invoices and quotes. Yeah.

KURT

1:11:24 I'm just looking at... BuildOps only shares PDF of invoices and quotes. So their version of quoting is not interactive the way that ours are, there's are just PDF... which you'll see you can interact with ours, right?

--- Small Talk ---

KURT

1:11:43 The...

KURT

1:11:44 You'll see that in the quotes, but I remember seeing something.

KURT

1:11:48 Out... manufacturing... service management features. I apologize because.

SHAMARI

1:12:08 You a giants fan?

SHAMARI

1:12:10 What's that? Are you a giants fan?

KURT

1:12:13 I am.

SHAMARI

1:12:14 Okay. Okay.

KURT

1:12:16 No, I have to admit, you know, I'm a little bit older. I got young kids, not young kids. I have middle age and not middle age, but high school kids. The masters, I haven't had four hours to sit down and watch football.

KURT

1:12:28 You know, I, I'll date myself. I love Lawrence Taylor. He's my favorite player, right? And...

KURT

1:12:38 Phil Sims and parcels, right? When we, I've lost a little bit of touch with.

KURT

1:12:49 I apologize. I...

KURT

1:12:52 Know the name plate thing. I will, I know that's a big thing. It's easy for the text like so they can just do it.

SHAMARI

1:12:59 I think, yeah, I think they call it or I'm not sure what that means but yeah.

KURT

1:13:05 I will.

SHAMARI

1:13:05 But anyway, yeah, yeah. So, who's your guys biggest competitor? Because we looked at a couple of things before again, and again, we're looking again, I know we looked at you guys. We looked at FieldEdge, BuildOps just came on the scene. We looked at a couple of other ones too. Who would you guys say your biggest competitor is?

KURT

1:13:29 I'll be honest. So, FieldEdge and all these other alternatives now outside of BuildOps... they're not specific to our industry, right? When you look at commercial service contractors in hvac and fire life safety, we have no equal. Now, BuildOps has done a great job in a short period of time, put sticking their nose in the hvac world and we, you know, teach them. I would say that they're our biggest competitor in hvac, but...

KURT

1:14:03 They...

KURT

1:14:03 They've hit some growing pains. They've grown a little bit too fast. We've had there's a large... you know, they tend to over promise and under deliver. And what I mean by that is, you know, they're very good... at getting people to sign contracts after, which they try and figure out how to get them live as quick as possible within a timeframe. I'm curious, have they estimated how long it would take a company like yours to get live?

SHAMARI

1:14:37 I believe he gave us like six weeks. I mean, no, I guess the onboarding was six weeks so that's where we're looking to do it in the springtime where we slowed down a bit. I believe it was six. So I believe it was six weeks, you?

KURT

1:14:53 Yup. I think yours is about, we would say, yeah, two two to three.

KURT

1:15:00 Months and...

KURT

1:15:02 And we just, we move as quick as you want as you can, right? So, if you guys are engaged in and we're checking the boxes quicker, we can move as quick as you guys want to. But sometimes, right? You wanna give time for the text to do the service module so they can learn the.

KURT

1:15:22 Perfect.

KURT

1:15:24 You know, you wouldn't want it to be digested too quickly where people are kinda like what just happened? You wanna be sure that everybody's copacetic with the system. We do offer onsite services before you go live.

SHAMARI

1:15:40 Do you guys come on, you guys come on site? Yeah, now we go. So.

KURT

1:15:45 As to say, if you wanna be in your office on Monday morning to show you specifically how things work, I'd be happy to.

SHAMARI

1:15:52 My car and drive there. Okay?

KURT

1:15:54 Doing about two hours that's one thing that they don't do. They, we win a lot of deals because a lot of times the feed.

SHAMARI

1:16:02 As well BuildOps never offered to.

KURT

1:16:04 Meet us in our offices.

SHAMARI

1:16:06 Yeah, I...

KURT

1:16:06 Think a lot of our companies outside of the larger ones, the national ones that, you know, they're you know, been in families two, three generations, and, you know, these people they like... hey, if I'm pro, you're gonna come here, you know, and not just, well, yeah, you call.

SHAMARI

1:16:28 That number, don't call me.

KURT

1:16:29 I'm on.

SHAMARI

1:16:29 Yeah, yeah.

SHAMARI

1:16:31 That's correct. Well, the big thing for us is, you know, it just took over this position here and it's a lot of older, it's a very older team. So, for me, ease of use is a big thing. Ease of use is a big thing. And, you know, get in touch with somebody. It's a big thing, you know? So you guys have a problem. I need to know that somebody's gonna pick up the phone or like you said, somebody's here, these problems resolved when we go live?

KURT

1:17:04 I think we're a little bit farther down the line then, and then a BuildOps in that respect, right? So, we have a team of probably 40 now that are only dedicated to onboarding, and all they've done is on boarded fire life safety and hvac, and we're bracing those groups, right? So, if you're you know, either you're onboarding, fire life safety or onboarding, hvac, right? You know, their workflows?

KURT

1:17:27 They...

KURT

1:17:28 Understand how you think?

KURT

1:17:30 It's...

KURT

1:17:32 You know, field agencies, other services, you know, they're not in this slim vertical, right? They're trying to get all these... entities that have text in the field or whatever it might be, and they're saying, yeah, we can do this and look how great this is and that is, but no, how do you understand how I think? You understand? You

know, these service contracts that we're trying to sell? Do you understand the importance of the assets on site? The ease of use of the tech to be able to generate more pull through work through deficiencies quoting deficiencies... and getting that to the customer.

                            KURT

1:18:10 Yeah.

                            KURT

1:18:12 That for us is what separates us. And like I said, there's really no one that comes close.

                    --- *Small Talk* ---

                            KURT

1:18:21 I...

                            KURT

1:18:21 Again, we tip our caps to build ups, but we just think that they're a little bit too arrogant. Listen, they're well funded, but... you know, we're headquartered in North Carolina. You know, we're it's honestly, it's a bunch of good old boys should hear, you know, I'm sure you heard the accent of the girl on the phone?

                            KURT

1:18:44 It's just, you know, these guys, you know?

                            KURT

1:18:49 Flying on jets, our co founder will get on a plane any time to go to.

                            KURT

1:18:55 We spend time with them.

                            KURT

1:18:57 That's just what he loves doing. That's just what he's about.

                            SHAMARI

1:19:04 So, I think it's now to, you know, you guys, can you?

                    --- *Small Talk ends* ---

                            KURT

1:19:11 You're the audio is a little bit tough. Can you do what you?

SHAMARI

1:19:16 Yeah, I'm not sure what happened there. I was saying that it sits down to, you know, either one of these companies here. So we'll sleep on it, you know, for a couple of days here and see what we wanna do... but we're gonna definitely do something in the next few weeks here. And I just wanna make sure we're making the right call, something that's right for us and that will definitely work, but we think that will work because obviously, we could try anything out and not suit us. So, another question is, are you guys a month to month or are you guys are a contract?

--- Pricing ---

KURT

1:19:58 We, are... we're annual? I tell my more... my bigger customers to sign as long a contract as possible, and I only do that just to lock in a lower rate. So I'll build my customers either quarterly or semi annually.

KURT

1:20:20 I...

KURT

1:20:22 However they, however it fits them best.

SHAMARI

1:20:25 Is it a, is it a contract? Is it a contract?

KURT

1:20:28 Yes, yes, it's a contract.

SHAMARI

1:20:29 How long, two year the year or?

KURT

1:20:32 Whatever suits your needs. If you said we just want to do a one year one year is fine. But like I said, when people do three years, you can lock in that lower rate. I understand you might be a little bit apprehensive to pull the trigger and say, well, you make the... if we make the wrong choice, we'll want to back out of that.

KURT

1:20:54 Contract. I...

KURT

1:20:57 Just me, there have been multiple. We... I'm sure we're a perfect fit for you. There's no doubt you're I ideal client profile in terms of what you do, if for example, you signed a three year contract, and after the first year, you said, hey, this is not

working, which I'm pretty confident you wouldn't but if you did like... we would let you walk like it's happened many times for smaller companies that it just wasn't a good fit whether they're an elevator?

SHAMARI

1:21:25 Rate or?

KURT

1:21:27 You know?

KURT

1:21:27 On demand electrical work, you know, where they're getting a lot of work through service channel.

KURT

1:21:33 You know, we...

KURT

1:21:34 We don't but yeah, we can, to answer your question, it could be one year. It could be however many years you want. The typical, you know?

SHAMARI

1:21:44 Second question, how much is it per user? What are we looking for on prices?

KURT

1:21:50 So... 15 text, right?

SHAMARI

1:21:56 We have 17 techs and three in the office.

KURT

1:22:04 Is free of charge? Okay? And are you seeing the 10 to?

SHAMARI

1:22:10 Sharing? Yeah. So one 39 per tech? Yes. Okay.

KURT

1:22:17 What was BuildOps about? Do you know, do you remember?

SHAMARI

1:22:21 I don't have it in front of me. I think it was a little lower than that, but I think that you guys started around the same. I think you guys start and, you know, I think

they, I don't have it in front of me. I think they started around 120 and that was, we brought it down. I don't have an exact number in front of me. I have.

KURT

1:22:47 Yeah. Here's, our, I'm just showing you our page online. We're very... open in terms of pricing. I think you're a premium candidate?

SHAMARI

1:23:01 What are the, what are the differences here?

KURT

1:23:06 Let me see.

KURT

1:23:10 So, just going from selecting and building off a select 15 text unlimited, you know, office users are always unlimited, right? We charge for the text because they're the ones that are able to generate more revenue for your firm, right? You're gonna have 100 off the staff and they're all free.

KURT

1:23:30 Great.

SHAMARI

1:23:32 I think that's the only difference with you guys and Bill, do they do charge for the office?

KURT

1:23:37 Right. Yeah. Listen, that's the thing is that you... we just are incentivized, right? We're our best customers, CSS, an investment, right? An investment in their workflow and investment in generate ability to generate, you know, more revenue and have a better client relationship. They don't think of us as a lot of times, you know, it's interesting. The smaller entities, you know, they'll see our cost and here like 30,000 dollars, you know, and literally, they'll just be like they can't get their heads around it because they're writing these checks for 2003 1,000 to these vendors and they're just like, no, like they can't get to the other side as the investment and what's that return on investment, right?

--- Pricing ends ---

KURT

1:24:23 Because you can make an investment in an asset could be a car, right? That thing's gonna appreciate. I'd like to think our investment is this multiplier. The more efficient you get with service trade, the more you understand, the more your text get it, you're gonna be able to your investment. Could, you know, people that, you know, are good at the technology and service trade and understand it? Okay, probably are multiplying their investment one two times. But people who really get it that really

delve in and really understand it are growing, you know, 10 15, 20 times, those are our biggest customers. The nationwide customers. The AI fire is that their whole concept for growth is to buy a company, right? Third generation, but they're too small. They can't compete in the bigger markets. And right? The kids don't wanna work in the fire light safety. So, right? They walk, you know, way, very wealthy. But a fire then comes in and inserts their service trade team. They train everybody on service trade. The efficiency of scale within the office alone will almost compensate for the cost, the premium that they paid for their business.

KURT

1:25:39 And...

KURT

1:25:41 Server, it's amazing. So, right? So.

SHAMARI

1:25:44 How long you, how long have you been there? Kurt?

KURT

1:25:46 I've been here... 18 months?

SHAMARI

1:25:51 Okay. Where are you before?

KURT

1:25:54 Finance.

SHAMARI

1:25:55 Okay. Do you have any references there? Somebody we can, you know, you think we could chat with and see how they like it and, you know, somebody's similar to...

KURT

1:26:10 C, M3.

SHAMARI

1:26:10 The three three just got bought, who just bought three? M3, just bought, who did they just buy? We just bought somebody... on? He just went something three.

KURT

1:26:28 That's a good sign. If either if they bought someone or someone bought.

KURT

1:26:35 The...

KURT

1:26:35 Because... I would suspect they probably brought someone. I think they're pretty big and what our best customers understand is, right? You're basically years ahead of your competition. Once you adopt technology like service trade, I, you know, communicating with the text in the field with your customers and the efficiency efficiencies you create in your office... you're just actually itching to, you know, either add more text or to buy someone else out because we're really in this inflection point where and you're seeing it in private equity, they're buying a ton of smaller hvac and fire life safety. They're trying to roll it up because they see how... the benefits of scale, right? When you take an old process that's paper driven and you apply this technology, it's like you're going from... I don't know... you know, first generation to like tenth generation so that it's really our smartest customers really get that they understand that.

KURT

1:27:50 And, and...

KURT

1:27:54 It's part of parcel we're seeing, you know, our customers buy some of the smaller people out.

KURT

1:27:59 And... yeah.

SHAMARI

1:28:04 Yeah, let me know what you have for a reference. We can reach out to. I'll be curious to chat with somebody. Of course, M3 is not much hvac. I don't think, I think they're more like, you know, I think maybe fire protection or automation might mainly. I.

--- Small Talk ---

KURT

1:28:26 Good. A C. Yeah. Yeah. And typically... it's harder you'd rather have a reference that's outside your territory right? There is always... it's not a comfortable conversation when two people are in server trade. And in the state of Pennsylvania, it's a big state.

KURT

1:28:44 But, you know?

SHAMARI

1:28:46 A lot of work to go around. I always say that there's 2,700 companies just in our Tri state area. Not up by you guys. Yeah, it's a lot of work to go around.

KURT

1:28:57 You're it's a very fair point and.

SHAMARI

1:28:59 No.

KURT

1:29:00 I promise you, I will give you some good references in.

SHAMARI

1:29:06 Is that male plumbing? What is that there? Mallard? Yeah. What is that?

KURT

1:29:14 I was just pulling that up. It's a plumbing and mechanical.

SHAMARI

1:29:17 Okay.

KURT

1:29:22 Birmingham account? Again? I think I was just looking at the website before I jumped on, you know, I think your father and his two sons.

SHAMARI

1:29:29 Okay. All right. So, yeah, let's keep in touch whenever you go with those references, you send them my way. You know, I could reach out and, you know, that with any of these guys to see how they like your guys system, how it works out for them.

KURT

1:29:48 Sure. And.

SHAMARI

1:29:49 When...

KURT

1:29:50 You looking to make a decision?

SHAMARI

1:29:52 Within the next few weeks here? Okay, sure. I would like to get something done before we start rolling out spring PMS. So I could, you know, like a lot more information on the PMS?

KURT

1:30:04 It's actually our high season for H back because I...

KURT

1:30:09 If...

KURT

1:30:09 Kind of the lull season before?

SHAMARI

1:30:11 Exactly. Exactly. So that's still all reason behind us yep.

KURT

1:30:16 And if I happen to be in your area, would you mind if I just swung by and?

SHAMARI

1:30:21 Yeah.

SHAMARI

1:30:22 That's fine in and out of I'm in and out of the office.

--- Wrap-up ---

SHAMARI

1:30:26 Paul is here majority of time. He's the one I started in, started this company, or Stephanie will be in here, just in we're all in and out. Somebody will be here, but I'm always in and out. Sometimes I'm in the field with the guys. Sometimes I'm here. So, and that's the reason I asked this young lady today, because I was, I know I had to be here to finish up a couple of things today. So I'm know the whole week I've been out. So I was here today, so, so, you know, let me knock out some work while I'm in here. Awesome.

KURT

1:30:59 I'm glad we connected to it's. Great to talk to you. I've got some good notes here and I will get you that references. I am gonna get you back on that OCR thing.

KURT

1:31:11 The name plate scanning, but...

SHAMARI

1:31:15 Yeah, that's why I mean, it's a cool convenient thing. I'm sure you guys figure it out in the future, you know, so.

KURT

1:31:26 Awesome. I appreciate your time very much.

SHAMARI

1:31:29 All right. Thank you. Bye bye.

KURT

1:31:38 And stopped sharing and he kicked in the thing.

The End