GONG

ServiceTrade Demo with Jet Industries

Darren Fleshman with Jet Industries
Recorded on 6/30/22 via Zoom, 46 min.

Participants

SERVICETRADE

Darren Fleshman
Field Manager

Lauren Rice
Director of Enterprise Sales

Tanya Eney
Partner Manager

JET INDUSTRIES

Andy Gragert
Service Manager

Chip Ayers
General Manager of Maintenance

OTHER

Terry Hardy

Topics

Transcript

LAUREN

0:00 Are we?

TANYA

0:00 Doing?

CHIP

0:03 Good morning.

DARREN

0:05 Really?

CHIP

0:06 You can't hear me? I'm have a technical problems this morning. This is Chip. Sorry.

DARREN

0:09 I can hear you might be able to hear me.

CHIP

0:13 Trying to get you in my ear here. Let's see here. Yes.

CHIP

0:33 We're doing now.

DARREN

0:35 I can hear you just fine.

CHIP

0:37 There we go. Alright. Good morning. This is Chip. I think we've got... Andy and Terry joining us or if they're not in here yet?

LAUREN

0:47 Yep. I see.

DARREN

0:48 I see them.

CHIP

0:50 Hi, I'm having all kinds of problems with my Zoom stuff on my phone. So, I apologize.

DARREN

0:54 No worries. No worries.

TANYA

0:58 Well...

DARREN

0:59 Thanks for taking the time to meet with us. We definitely appreciate it. I know that sounds like you guys have taken a lot of time to evaluate some other software and appreciate you given us the opportunity to show you what we have as well.

--- Purchase decision ---

DARREN

1:15 Normally, the way run these meetings is all hand the Mike over to you after I do an introduction to my team and let your team share a little bit more about exactly what you're doing. I appreciate those emails back and forth. And then I can tell you a little bit about service trade and dive right into the product if it all makes sense. So, it sounds like a game plan.

--- Purchase decision ends ---

CHIP

1:40 Right, right.

DARREN

1:41 Alright. So I'll let my team introduce themselves, Tanya, if you want to start.

TANYA

1:47 Okay. I'm Tanya. Any, I'm the director of accounting partnerships. So I do a lot with the integration. So I'll be answer these questions. I'm an integration with.

DARREN

1:58 Hi, I'm Lauren.

LAUREN

1:59 Hi, I'm Lauren, I'm the senior director of sales for the west coast here at service trade. So, nice to meet you all.

CHIP

2:08 Nice town.

DARREN

2:09 Yeah. And so, I'm the field rep for service trade. I live in Everett, Washington, just north of Seattle and the cover loosely phrase the northwest. I go South Dakota up to manitoba and west but I'm semi local for you guys.

CHIP

2:29 Territory. Yeah... yeah. Good to meet. Everybody. Good morning.

DARREN

2:34 Yeah, Chip, if you don't mind introducing your team to us?

CHIP

2:39 Yeah, but my name is Chip Terry. I am the general manager of the servers and making a division of Jet industries. I've been there about 20 years. We've changed a lot of those years. We're now a fairly large nationwide profile MVP, meaning if we are to about 95 98 percent new Construction commercially and those disciplines are fire, electrical, plumbing, and HBCR divisions fairly small.

--- Accounting integrations ---

CHIP

3:10 And so we're looking to integrate all those different divisions and disciplines into one service management software, which is what we're looking at today with us is Terry Hardy is our director of it, is going to be talking to you guys about the integration piece as far as how we communicate with the back end and how that looks.

--- Type of work ---

CHIP

3:30 And we have Andy Gregor with as soon as my service manager boots on ground just about the most important during the call for our side because he's the guy who's gonna use it every day.

DARREN

3:41 Yeah, perfect. So with your team doing 95 98 percent install, are you looking for something that is gonna work for both the Installation work and?

TANYA

3:52 The service side?

DARREN

3:52 Are looking for something for the service side for all your MVP groups?

CHIP

3:56 Service and maintenance contracts that's pretty much all we're doing. We're road. The install side is something that commercial guys do and they do it locally as well. But they're not interested in the solution.

--- Type of work ends ---

CHIP

4:07 At this time. This is going to be strictly dispatching invoicing quoting and how it integrates in the back end with our ERP ERP vista and Viewpoint. So we're going to start off small with our team of about nine people. And then we're going to scale it up once we are familiar with the product, with the other disciplines, comedy, and probably close to 30 people with license needs.

--- Purchase decision ---

CHIP

4:35 Once we get everything in the integrated together that's... a couple of steps down the road. But for the most part, the implementation will involve us are small group first getting confidence in the product and being able to answer some questions for our team and being confident that we can manage their processes as well. And then we'll scale up a little bit later down the road?

--- Type of work ---

DARREN

4:56 Yeah, great. And then I know that there was a couple of mentions of residential work that your team is doing. What percentage would you say is residential versus commercial or industrial?

CHIP

5:10 Andy, you want to jump in and answer some of those questions, but.

ANDY

5:14 Yeah. Speaking specifically to the service side, it's hard to put a full number on it and it fluctuate with the demand. So as we move into the season, you know, summer is kind of our busy season. That number is more like probably 80 percent residential, 20 percent commercial. However, you know, as the rest of the company and even in their downtimes are preventative maintenance contracts were more like, you know, 80 85 percent commercial in that aspect and, you know, 1,520 percent residential. So it kind of fluctuate quite a bit to be honest with you.

DARREN

5:48 Okay. Taking some notes here.

DARREN

6:01 Okay. And with those commercial customers, are you and I guess with the rep and I guess, let me backup to second when you say residential or are you talking homeowners or are you talking property managers handling apartment building stuff like that strict?

ANDY

6:20 Homeowner. So when we talk residential and our terminology for property management and all that sort of stuff, we kinda categorize them in the commercial aspect.

DARREN

6:29 That's exactly what we do too. Yeah. Glad that we're on the same page with that. So, do you have any preventative maintenance agreements with those homeowners or is it most time just phone calls in and?

ANDY

6:43 We do, we do have a fair amount of residential maintenance customers, but I mean, they're kind of one time of year visits. For the most part, you know, there's the occasional customer that's you know, the specialized one off for a couple of letter, you know, twice here. But speaking, yeah, we do have a fair amount of residential preventive maintenance customers. Our main preventative maintenance program are strictly or not strictly what our main focus there was kind of the commercials.

DARREN

7:11 Yeah. Yeah. Unless it's normally the commercial customers who are even open to preventative maintenance contracts whereas the residential isn't quite as understanding that, hey, if I take care of this equipment every year, then it's gonna last longer for you. Yeah, I'm trying to think if there's any other questions, Lauren, do you have anything that, that's popping out to you?

--- Type of work ends ---

LAUREN

7:40 I had a question and then I lost to as those listening because I was a little surprised by the breakdown of residential and commercial. Yeah, I'm sorry, I really don't have anything at this point.

DARREN

7:57 Yeah, that's all right. So, so to give you a brief background of who service trade is, and let me share my screen real quick here.

--- Type of work ---

DARREN

8:15 You guys able to see my screen?

ANDY

8:18 Yeah, I can see it.

DARREN

8:20 Yeah. And I think to Lauren point kind of the reason that she brought up that she was a little thrown off by the residential versus commercial ratio. We are focused on commercial service contractors and helping them to become more sticky with their customers.

--- Deficiencies ---

DARREN

8:39 And that way they can grow. So getting those preventative maintenance contracts marketed out for three years or whatever it is and continuing to see that revenue come in and then went on site, make your text as efficient as possible and grabbing pull through work whether it be refrigerant leaking or in the fireside finding deficiencies, where doesn't pass inspection and so on.

--- Type of work ---

DARREN

9:04 And so forth. So... that is our focus is the commercial industry because with the residential, you run into the hey, you want your text to while they're sitting in the drive way, get as much out of that homeowner as you can. Because it might be five years before you see the homeowner again.

--- Customer engagement ---

DARREN

9:22 But with that, our customers are seeing a lot of need from the commercial side of, hey, I'm used to seeing everything on my phone or computer and being able to get notifications from Hoover dominoes or whatever it is that you order from mod pizza is my go to for pizza.

--- Deficiencies ---

DARREN

9:40 But so I think since you guys in route notification, give a heads up that, hey, we're on our way, you can do online quotes, with pictures and videos, and audio memos, anything that you need to share with your customer. And again, this is why we focus on the commercial side because most of them, they're not given up on the roof or they're not going into the rise, a room to see what's happening there.

DARREN

10:06 Trusting that you're doing your job and by sharing that story with them through photos and videos, kind of reinforce that, how valuable your service links. And then, I know for you, Andy, you'd mentioned a customer portal would be super helpful for those locations that you have multiple locations that you service for one Bill to address.

--- Invoicing ---

DARREN

10:29 So do you have a service portal that your customer can log into? And then the ability to send an invoice link? So the question came up to, hey, can we accept the credit card in the drive way? I'm not exactly a like a square cash or something like that, but the tech can send or the office can send an invoice linked to the customer and they can click the pay now button, put in credit card or AC H to pay for that service that you provide. And forum.

CHIP

11:01 Within that's where that's not in it that's not integrated Darren into your software directly or you say there's an invoice generated? Does that go to a pay site or how does that particular piece work? I just wanna kinda get an understanding of that.

DARREN

11:14 Yeah, that's a good question. So we partnered with a merchant name stacks STOX... and with them, they, we've created that integration to where you're sending the invoice from service trade. It's got that link right on the right on the top of the page. When your customer opens it up, they click pay now and then that the dollars are flowing through the stacks side.

--- Type of work ---

DARREN

11:37 So they handle all the money side. We're just, there is a place for them to be able to put in the information.

CHIP

11:44 And are they charging a percentage for that?

DARREN

11:46 Yeah, just like any other credit card merchant?

CHIP

11:50 Thank you. Yeah.

DARREN

11:53 So with the information that we're more focused and practically solely focused on commercial service contractors, is there any POS that comes up in your guys, his mind or anything that you see that we shouldn't keep on taking a look at what service trade is?

--- *Accounting integrations* ---

CHIP

12:11 Yeah. Keep on plugging.

TERRY

12:14 I want to pause it at this point just to see. Chip brought it up earlier about integrating into the ERP. In particular, we're using... Viewpoint vista. We are cloud hosted option with them. One just double check how you integrate with them. Do you, do you have a direct connect into their, into that accounting system?

--- *Accounting* ---

DARREN

12:38 Yeah, great question. I will let Tanya fill you in on that.

TANYA

12:43 Yeah. So we do have several vista customers using service trade with vista. We have a semi automated export import. So we utilize this is important capabilities and their automation on the import side. But it is an export out of service trade and then you import in.

--- *Invoicing* ---

TANYA

13:05 So we can bring out things like accounts. So you would be doing your a, our billing out of here. So we would, that would be one of the things we move over is those invoices into the system and then depending on if you get into doing purchasing or inventory, those can be also sent over as well.

--- *Accounting* ---

TERRY

13:22 So the work of the work is done in your system and then export it as a credit whether it's CSV or however it is, and then import it into the Viewpoint side under the bus.

TANYA

13:34 Right. That's right? Just sort of like to recording and for accounting purposes.

TERRY

13:39 Right.

--- Tech On-site ---

TERRY

13:40 So that, that's the key there just because what we're struggling with at the moment event is that we have seven texts in the field and one or two people in the office. So when the tech goes out to us to a job site to create a new customer, they have to actually contact back to the office to do the work inside of vista.

--- Paper process ---

TERRY

14:03 So it's putting a lot of them work back on the cut back on the office staff instead of where we want it to be, which is on the text side on the text side and the field tech side.

TANYA

14:14 So it's so every time there's a new customer, you're saying I gotta call the office and have it set up in vista and you want to check to be able to create the customer out in the field themselves?

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

TERRY

14:24 Right. Yeah. So if they create, they can create the customer, push it all through to the system and including if when they invoice or when they finalize the job, the work order, everything gets finalized by the tech and not so much by the back of house, by the office stuff. Chip Andy you have, do you have anything else on that side? Yeah?

--- Accounting integrations ---

CHIP

14:47 Clear. A clear kind. Have question for me. Is it, and I'm gonna use the wrong word binary? How does flow? Is it Omni directional looking at going to go back and forth and transfer information from the field software back to the SM module or vista directly? Or does everything originate and birth inside this to Viewpoint and then feel connect? Sorry, service trade latches onto that or do they flow back and forth? Can one populate the others database? I probably is a better question.

TANYA

15:23 So, it could, I mean, most folks opt to go one way, you know, either the customer, sometimes accounting, once we have a lot of customers that accounting wants the customer to start in the accounting software and then go into service trade, but, you know, it could start from the field.

TANYA

15:43 And then we could, you know, export that list of customers along with the list of invoices to be brought into this, that is set up the customers and then we have right behind it, bring in the invoices.

TANYA

15:59 It's...

CHIP

15:59 Terry, is that, Terry, is that sounds like what does that sound like to you? Is there another question there?

TERRY

16:05 That we've it's not giving us the direct operation. It is that it is a two step process where you're creating. It sounds as if you're creating the information in one system and then moving it to the other system or copy, you're copying, exporting, importing, you're not getting the direct connect from one database. It is a, it is a two step process.

--- *Accounting integrations* ---

DARREN

16:32 That's correct?

TANYA

16:34 Yes, it is an export and import.

DARREN

16:41 Yeah. I know Chip you had mentioned ribbit... we're working with them with couple of our existing customers for a spectrum integration, but we currently don't have any of our customers with a full talking back and forth integration with Viewpoint.

--- *Customer engagement* ---

CHIP

17:00 Right. That right there, answers our question right there. Okay?

DARREN

17:09 Yeah. Yeah. Let me jump over and kind of show you what your customer can experience. This will be for like property managers or customers that you service several locations forum? This would be a link on your guys. His website.

DARREN

17:30 Did you put in, you choose who gets approval for log in and everything? But they can see, hey, what's happening today? I can also see that whoever is doing this job is actually on their way to the job, what's coming up next week and what jobs have happened in the past?

--- Invoicing ---

DARREN

17:51 And from here, they can go and say, hey, we've got an invoice out for that one. Have we pay to yet? Let me click into it. Okay? Yeah, we pay this one, but if Zoom down to this other one that we pay that one... and it will come up and look at that. We paid that one too. So if it hadn't been paid yet, there would be a button there on the right hand side that says, pay now for them to click on and pay it right right from the customer portal. And then they can also dive into their individual locations.

--- Assets ---

DARREN

18:25 Let's say we wanna look at costco... out of Chicago and dive in there and see, okay, what assets do you take care of for us at that location? And when was the last time you were here? And then they could dive into those individual jobs and see exactly which did... Andy, is that kinda what you were hoping for in a customer portal?

--- Assets ends ---

ANDY

18:52 Yeah, no. It's definitely what I was hoping for our customer portal.

DARREN

18:56 Okay. I do have to ask a couple more questions because the questions that seem to be coming our way seem to be more that residential focus of hey get a phone call, text shows up to a job they've or someone that we've never service before.

--- Type of work ---

DARREN

19:13 So now the tech has to enter them as a customer... the same with the invoicing side, making sure that I mean, would you say that your, I know you said 80 20 during the summer and 80 20 during the winter for commercial. But would you say so with that, you're about 50 50 residential versus commercial? And is the residential side something that you're trying to fix or is commercial side something you're trying to get more efficient?

ANDY

19:41 We're really trying to primarily focused on the commercial aspect, but, you know, we have some dental is always gonna, someone should be there as well.

DARREN

19:50 Okay. I just, I'm just asking these clarifying questions so that we don't waste anybody's time since we're commercially focused.

CHIP

19:58 We, we consider ourselves more commercial centric then residential. We are not seeking residential customers. We are seeking commercial customers.

DARREN

20:05 Perfect. Alright, great to know. Alright, so that would be from the customer side from the office side, which you get to see is a quick snapshot of what's going on with the company when you first log in for the day.

--- Dispatch ---

DARREN

20:21 So this would be your team in the office, what you could log in and see, you see, and what scheduled for today. And then if any of that work has been completed yet... what has been, what is like an inspection or a PM that was supposed to happen, but we didn't ever get it scheduled. So let's make sure that we get a view on those fast. And if I, your scheduler and had a 1,000 overdo projects, you'd probably fire me, but... what your hope is that overdo stays empty because you're seeing this jobs with appointments do in the next two weeks and you're staying on top of that work that's supposed to be coming up in the next two weeks.

--- Tech On-site ---

DARREN

21:00 And then you also have, we want the office to have final say on whether or not we're not a work orders complete. So the text says, hey, I completed these for services, but let's have the office just take a quick glance, make sure that there's no typos, make sure that all the labor an items that should be on that are on that before we send off the invoice.

DARREN

21:27 So... today we're gonna work on a preventative maintenance job at the shoots up in Portland, and we've got this quarterly rooftop unit that were taken care of from the office. We already know some common items that we're gonna use to get this work done. Can dive in and see if there were any clock events from the texts or anything like that.

--- Access to information ---

<div align="center">DARREN</div>

21:51 But this would be the view of the work order from the office, from the text side, what they're gonna see.

<div align="center">DARREN</div>

22:02 Is not a black screen but instead this so a mobile app, iOS or android used on tablet or a phone, either one. But it's an actual app on their device. That way they have the capability to do some offline work if you run into areas that you don't have good self-service or down in the basement or in a parking garage or something like that. So, these are all the jobs this task is assigned to. But I can filter by today.

<div align="center">*--- Tech On-site ---*</div>

<div align="center">DARREN</div>

22:31 Let's see just the work that I'm supposed to complete today. When I dive into that job, what most of our customers want to their text to be able to see is, hey, what is it that I'm supposed to be doing today? Who is it that I'm supposed to contact?

<div align="center">*--- Assets ---*</div>

<div align="center">DARREN</div>

22:44 And were there any job items that I was supposed to bring with me to make sure when I'm climbing that latter to get on the roof? I've got everything up there with me. I don't have to keep on coming up and down. So services is what am I supposed to do today? That quarterly rooftop unit we talked about earlier job items are all the items that we add in and the tech can add job items as well if they use something that wasn't predicted. And then there's contacts and comments. There's, location specific or job specific comments to, hey, every time we come back to the same location, then we need to know this information. Maybe it's a lockbox code or a job specific. Hey, here's what I did on this job. That way it stays with this job. But let's say your tech on something that needed some repair work. And this is a sadly my favorite. Now... this guy... because he's no longer with us.

<div align="center">*--- Deficiencies ---*</div>

<div align="center">DARREN</div>

23:53 You'll notice his feet. My dog got a hold of them at one point. So, Russell Wilson, there's no longer a seahawks that he's deficient... but I can add photos, videos, audio memos, sometimes for an audio memo, you wanna tell the office. Hey, here's what I found. It's gonna require these parts here's. How long I think it's gonna take. And I'm going to need another tack to help me out with it. So that way you can keep that information for the office to have his... but we're going to say that it's an operable and that pick which asset it's tied to. So this will allow you to over time as your service in your customer. Hey, we've done 20 repairs on that individual piece of equipment that's on site. It's time to replace that and you have a clear history to tell your customer of exactly what's been going on. So, if I fix it while I'm on site, I can say fix, but I'm gonna say new and save that. Now, someone back in the office, it's an email that says, hey, Darren just found deficiency. We need to quote that out. What questions do you guys have about the mobile app for the tech?

--- Deficiencies ends ---

DARREN

25:12 That lose everybody?

ANDY

25:15 No, I'm still here.

CHIP

25:17 Lost my mute button to say.

TANYA

25:19 Yeah.

ANDY

25:19 Me too. Sorry.

TANYA

25:21 I...

ANDY

25:21 Mean, I don't have any just, you know, off the top of my head honestly?

CHIP

25:26 Yeah, it's still absorbing this. Yup. Yeah.

DARREN

25:30 Yeah, we try to make it as easy as possible for the text to be able to use it.

--- Access to information ---

DARREN

25:36 The office gets a little more complicated just because there's more features to be able to use. But the text side we want plain and simple, hey, here's, these... eight tiles that you need to be able to do and just dive in there and get your work done, move onto the next job. So, let's jump back to the office.

LAUREN

25:59 Hey, Darren.

DARREN

26:00 Yeah. Go ahead.

LAUREN

26:02 I seem to remember and ships email that field quoting was important to them.

TANYA

26:08 Sure.

LAUREN

26:09 That.

DARREN

26:10 I can do that. Let's jump back out there. So, yeah, Chip you did mentioned that field quoting is something that's important to your team for your day to do?

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

CHIP

26:25 You to allow you to have access to be able too nippy, more so than I'm sorry, good dogs more so, and I, since that a tech could have some ability to show the customer what the work is that we're looking to do then having that customer have the ability to accept or decline said work and have a history of that.

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

CHIP

26:49 So that six months down the road when the gear breaks again because he didn't want to clean the coil and comes back to us and said, I just page you would just broke down again. Why are we having these issues when you were just here, we can show you decline this or some record of, we offer the service, you declined that this is what your system broke. Again, that's kind of in the vein that I'm looking at in. Yeah. And do you feel free to throw in, you know, other caveat to that, but no, leave that checked, the ability to do that.

DARREN

27:19 Yeah, yeah. Exactly. So, so... there's two different ways that some of our customers do that on that original page that I showed you and I'll dive back here in just second.

--- Tech On-site ---

DARREN

27:30 There is an option for a pre work authorization that says, hey, do you agree that I should I'm allowed to do this work? And they sign off that yep, you can do this work in the same with the work acknowledgement when they're done on a job. And I'm not work acknowledgement, you can have these deficiencies listed and make a comment in there that says, hey, customer, Bob said that they're going to pass on fixing this deficiency this time.

DARREN

27:57 So those are options inside there. But then there's also the option for the tech to be able to add a quote straight from the mobile app. So let's dive in there. Perfect. Let's bring to shoots. Yes, I need to know how to spell. There we go. I got lucky.

--- Quote templates ---

DARREN

28:23 So then they can choose their job type. You're only going to have the type of work that you complete in here instead of this huge list of things. But then you also have the option of pricing contracts. So if you got a customer that, hey, they're really good customers.

--- ST app contracts and pricing ---

DARREN

28:41 So we only mark up our time and material this amount versus someone that we just now got started with and we're going to Mark up their time material this amount. So you can create pricing contracts inside service trade to mimic that, and then set that for that con, that customers pricing.

--- Deficiencies ---

DARREN

28:59 So the tech, it doesn't have to worry about how much am I going to mark this up today? So... I'm gonna add a deficiency to this. So this is that leak found... that I brought in earlier, gonna say that it's do within the next week... save it. These are all capabilities that the office has to.

--- Quote templates ---

DARREN

29:29 You also have the capability to do quote templates. So if you do the same type of work over and over again, and most of the time the information is pretty similar, then we can, you can just do a quote template. Let's see. She's a random one here. But then maybe this time it's a little bit different. So you always have the capabilities to go in and edit it after the fact, if I wanted to dive into that wording and adjust that I could. And then we've got the two job items. Hey, this job item. Oops.

DARREN

30:14 So we've got... all of our options here to do.

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

TANYA

30:19 The quote?

DARREN

30:20 That I was just making pushed the wrong button.

DARREN

30:32 Here we go. This is the one I was working on. So we got all that information, t's and c's and then I can choose to review with the customer right there on the iPad and the customer can go through. So answer you Chip today. And then this would be when you hand the tablet over to your customer, they see all the information and the pictures and all of that.

--- Tech On-site ---

DARREN

31:02 Yep, I agree to it. I'm gonna sign it and then they get an email copy and then the copy of the sign quote, there's gonna be attached to this job as well.

DARREN

31:19 So, similar process from the office, but your text do have the capabilities to do it as well.

--- Deficiencies ---

CHIP

31:29 And is that kinda show you?

ANDY

31:31 Yeah, no, that looks good.

CHIP

31:33 Yeah, there it is right there within that.

DARREN

31:40 Yeah. So now, when we go back to the office, a couple of features that... are super helpful when it comes to quoting and all of that fun stuff. When I dive into this deficiency... it's going to have that quote tied to it. And with... that efficiency, let me see if I can find.

--- Quoting ---

TERRY

32:11 Real.

ANDY

32:12 Quick.

DARREN

32:14 With the quote, you have a history of exactly what's happened. So, who approved it? If you were sending this from the office or sending them from the text side, you can see when your customers looked at the quote as well. And with that information, you can run reports inside service trade that say, hey, show me all of my quotes that I sent out between this time period that were submitted and the customer reviewed, but it hasn't been approved yet. So I run that. I've only got one. But if you had a bulk of them, you could just click, send the customer and choose what contact that those locations you want that quote to be recent to saying, hey, we're still waiting on approval on these quotes?

DARREN

33:00 No fire life safety side, especially that liability side that you're that you run into. If you can clearly state, hey, customer looked at it... we can't be the ones that are charged with this.

CHIP

33:15 Right. Yeah, that's yeah.

DARREN

33:20 Yeah, I'm the same like you said Chip, customer says, hey, we just paid you for this. Why are you saying that this is broken down? And then you say, hey, you never approved this quote.

CHIP

33:31 Exactly. Yeah. And it could be, was feature the same guy who has memory issues or too much actually played or maybe new managers or new ownership. So, yeah, absolutely. That trail is important.

--- *Quoting ends* ---

DARREN

33:43 Yep. Yeah. So.

CHIP

33:46 You still, you fire protection, you can do fire life safety as well.

DARREN

33:51 Yeah, yeah. We actually started in the fire life safety side. Our to co-founders worked for a company called dumb well out of North Carolina and they did kitchen exhaust cleaning. But Brian Smith who's our CEO actually developed the software while he was with that company. And then when that company got bought out, the

new company didn't want the software. So they're like, all right, we'll start service trade... so, but we saw from the fire life safety side who has those, it's more regulated on that side where you have to come out and do, the customer has to get their stuff inspected on a regular basis.

--- Recurring maintenance ---

DARREN

34:28 Whereas mechanical, they're not required to. But we see that same trend of I need to go back to the same location on a regular basis, whatever the intervals are. I mean you could do it every day if you wanted to set up that service to reoccur every day or quarterly or semi annual, or every six years, whatever it is. And then with that can run a report that says, hey, show me...

--- Recurring maintenance ends ---

TERRY

34:56 Here.

DARREN

34:57 Show me all the opportunities that I have within the next month and you can just turn those into jobs and make sure that you're getting that recurring revenue over and over again.

LAUREN

35:10 Curious, why did you ask about the fire life safety?

CHIP

35:15 I thought maybe we might have touched on this when I wrote this stuff yesterday but it was a, it was a day yesterday like all of the month. But our ultimate goal here is to integrate our different disciplines into one centrally dispatched in managed software. We HPC use the 600 pound gorilla in the room, but we also have six seven figure revenue in electrical, plumbing, fire protection. Any convincing to name? I believe the five major disciplines. And so we're tasked with the software, embedding it out. And then also once we get our minds wrapped around how it works, which we made that decision to drawing those disciplines into one centralized piece of software that integrates with our ERP and can allow us to run our service opportunities out of one location, being one location or building and manage all those processes through one team versus how it is very fractional.

--- Type of work ---

CHIP

36:26 Has at the moment, it's there's no form protocol or procedure between all the divisions. And then they just simply asked to stop. And the software solution needs to be able to hardly manage not only residential but mainly commercial obviously in the fire protection side, but electrical and plumbing as well. Other plumbing is like us. We could drawn into the residential side by nature by virtue and we have to

LAUREN

36:59 Yeah, it does. Yeah.

--- Type of work ends ---

LAUREN

37:00 Thanks for providing that context. I guess based on what you've seen so far, how do you feel that service trade will kind of meet some of those needs you just outlined?

CHIP

37:11 Yeah. The first, Andy, yep, I see it. I don't want to call it. That is... the ability of the software to communicate with our backbone.

--- Accounting integrations ---

CHIP

37:20 Our ERP is very important. So we aren't double entering. We aren't double click, double work for people and hours doing it and feel than having to come back in and re entered into our ERP in the office. We've been down that road and done that before we developed workarounds to do that.

--- Accounting integrations ends ---

CHIP

37:36 But we're looking to streamline that so that we can use a field managed where that allows our office people to do less with more cute little paraphrase there. But that's kind of one of the things that I'm seeing right now that's a little bit of a, an issue.

--- Accounting integrations ---

CHIP

37:53 The servers to the software itself looks great. I have no issues with the former fit. It's mainly that piece that Terry can speak to more than I can in the technical aspect, but that, that's the only down downside that I've seen so far but the software itself is great.

--- Accounting ---

TANYA

38:13 And for the integration, I wouldn't have to be a reenter. I mean, it would be an export that we're just, you know, you typically users would just bring it in once a day.

You know, what the work that was completed yesterday just gets imported into vista to update our, you know, on a daily basis. So I don't think you'd have to do any reentry would just be, you know, doing the import?

--- *Purchase decision* ---

CHIP

38:35 Okay. Fair enough. Thank you.

DARREN

38:43 Yeah. I guess Chip with you guys haven't already evaluated a couple of other softwares and narrowed it down to a couple. Is that something that hinders from service trade being in consideration to we keep on looking at what else service trade hazard? Or is that a stopping point for your team?

--- *Accounting* ---

CHIP

39:06 Terry, thoughts on that on your end? What does that create New York?

TERRY

39:13 Hi, it's just a, it's just a, I, even though it's once a day. I mean export import, you still run into issues of whether it's duplicating information or if you're getting correct information across? And then there's just the, I think it adds a little bit extra care that you have to take on the back end.

--- *Accounting ends* ---

TERRY

39:29 I mean, are you mentioned earlier that you have you're working with? We have it... for the spectrum side of vista but not for the, not for the from Viewpoint rather than not from the fist aside. Is it even on the road map at this point for you guys to move that direction?

TANYA

39:50 It could be, you know, it could be mean we were working with revenue. We're getting them through the spectrum one and so that we have a lot of the components. So I'm gonna which they already have the site hooked up to service transfer that, I mean, just adding the Viewpoint side.

TERRY

40:07 Okay.

CHIP

40:08 Predominantly the clients that you're dealing with, their phenomenally a Quickbooks kinds of company, is that correct?

TANYA

40:14 No, no. We have a lot of large ERP from, you know, Microsoft dynamics, a lot of Sage users. We have spectrum users we do have is to use as I mentioned, you know, I'll walkthrough the ERP life Intacct and NetSuite.

--- Purchase decision ---

CHIP

40:31 Okay. All right. Good. Thank you at the answers that question. Sure. I guess to answer your question, Darren, I gentleman that I've seen what I need to see. I understand... the overlay. Do you have specific questions about how the pricing majors Andy can't speak today matrix works as far as flat rate versus our, how we're going to pull that across and price things out? Or is that not something you want to go into with this software?

ANDY

41:05 Yeah. I think I have everything I need. Honestly. I don't think we need to do that deep into that sort of stuff right now.

CHIP

41:12 Yeah. I think I'm good as well. There. I think we're good. At this point. It is going to be a detriment. I have to say we're we are making a decision today and I've met, sorry to have to, you know, yeah, that chance meeting on Friday work that well, it's just set it out. You stop by at the right time. Otherwise, I wouldn't have been able to look at you guys but I'm glad that we did. And I am aware of you is I look more and more into you guys. I've seen your guys, his name around. I've been in the business long enough that I've seen your name and been involved in some companies that have that, and it's a good software by just don't know that with the time allowed that we have that we're probably going to be able to integrate you into the mix. We're down to a couple of people right now honestly, and we're going to make that decision today. So, but I just don't think we have the time to really such that out that would, that it will work. So just being honest with you.

DARREN

42:00 Yeah, yeah. And we were aware that it was a long shot, no one that we were coming in and kind of the end of the evaluation. So, so I appreciate you being straightforward on that. If I could ask, I mean it doesn't do me or change anything for me. But which way are you guys leaning? Are you leaning more towards service tightened or build up?

CHIP

42:20 That's... I got one guy leaning towards the ServiceTitan because of the bridge feature sets.

--- Purchase decision ends ---

CHIP

42:28 I'm kind of more of the BuildOps side because it's integration, the ability and... they, they're vibe, they're textures difference to the point. I kinda liked them from what they bring to the table, give them more time to look at what you've got it. It's just that background thing that Terry is going to be 100 percent on board. I'm not here at 100 percent from him at this point. That's kinda what style, but probably, you know, any are gonna get on a call after this and battle it out. We'll go with probably one of the two today, but I can't say with any survey, which one it'll be.

DARREN

43:02 Yeah. Yeah. I figured I'd ask if I always like to hear what other people are doing out in the industry to.

CHIP

43:10 Yeah. I mean, it's good to know. I think probably... I'm not going to give away my hand here for Andy, but it'll be one of those two at the end of the day, but... I wish we had more consideration to you guys. I live use the Russell Wilson thing.

LAUREN

43:30 Here's what I'll say to that because I've been in this industry for long enough to kinda know the players the two that you're considering or are nearly identical because the backbone of one was sort of inspired by the backbone of the other. So I don't really think you'll go in the wrong direction if there's if the, this, the integration is ultimately the most important thing to you because I, my understanding is that they both do that relatively. Okay. I would say sintering the breakdown for your service and maintenance group. The amount of residential that you do service type might be the more strategic play if that's a part of your business. You think looks day. The other thing I'll mention is if you feel free to use us to get a better deal from either of them and let them know that we didn't do this. But you can, I gave you permission to tell them we low ball as you see, get a better price than with everyone... because nobody's allowed to wheel and deal.

CHIP

44:45 Yeah. Yeah. Well, this is the last day of the quarter. Say everybody wants to wheel and deal.

DARREN

44:50 Hello?

CHIP

44:53 Thank you, Lauren. I appreciate that very much.

LAUREN

44:54 Yeah, of course. Yeah. I think you guys will have good results with either of those. Obviously, we'd love to be considered if you all do revisit your service software in the future and, yeah, just let us know how we can help.

CHIP

45:12 Yeah, nothing's forever.

LAUREN

45:13 Yep. That's true.

CHIP

45:15 Cool. Alright, Lauren. Thank you, Darren. Thank you. I appreciate you guys setting this up quickly for us and getting it together. So, and Tanya, I appreciate you as well. Thank you guys for fairly input and hopefully like say... go seahawks... thanks guys. Have a great day. Thank you.

DARREN

45:36 Alright.

ANDY

45:36 Thank you. Good.

CHIP

45:38 Bye bye.

The End