AO Reed Connection

David Teeter with A.O. Reed & Company
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Participants

ServiceTrade

David Teeter
Account Manager

Billy Marshall
CEO

A.O. Reed & Company

Martin Naranjo
Service Manager

Other

Topics

Transcript

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MARTIN

0:01 All right.

DAVID

0:03 Hello. How are you doing? David? Doing good, doing good?

MARTIN

0:06 Good, good. All right. Let's see where we're at.

MARTIN

0:25 Okay. All right. So we've got the group here trying to get this lead up for, the assets types and the groups, you know, so that we do that due diligence for yep. So just kinda trying to wrap that up as well. So it could be done with that. Okay?

DAVID

0:46 And once we have that from you guys, we'll be able to sit down with the service forms team and scope it out with them to see what that project would look like. Just give me a little bit of background on what you're trying to accomplish with that due diligence form.

MARTIN

0:59 I'll share this file with you so you can kinda see, yeah, you can see it. Let me open it up.

MARTIN

1:12 All right. Let's me share.

MARTIN

1:18 Well, where the screen, when does it do? Okay, cool. Interesting. All right. So this sheet right here, this is that when we talk to, sir, we mentioned that we wanted to kinda have a specific asset type and working with the parent group, and then having the field listings, what exactly, you know, what exactly should be as part of their fields, right? That specific type of unit, right? So the asset type would have these field listings, and then this would be the group we wanted to be connected to. So that way when we run, our service, is they're already assigned to that specific group? It will already have the tasks that need to be performed on it based on that group, right? So currently, what we have is like, let me see what we have... a, right? Is that one that we can use as a, as an example? What we're let's just go or, yeah. Yeah, I mean, just go location and the location. Yeah. So when we're looking at this, you know, we're looking at the assets. I don't know if you can see this when we're looking at the assets, I click on the asset type, right? Wanted to have.

MARTIN

3:02 Okay. So we wanted to have specific questions that it asks, right? As part of this information, we look at, the document I'm putting together anything in black. Yep, anything in black should reside here, right?

DAVID

3:19 So an asset overlay, you want the fields to be customized to you guys?

MARTIN

3:23 Yes. And then, and then the other thing we want is on this sheet, you see that it's in red. Those items in red. We want them to be marked or noted in here automatically as notes that would give us, that would give us more like the voltage, the current condition of the coils, things like that just so that we have it on record that was, you know, documented, right?

BILLY

3:49 Okay. Real real quick. What's the difference between the black stuff and the red stuff? Why wouldn't you want the red stuff just to be more fields? I'm just curious why may?

MARTIN

4:04 The red stuff?

BILLY

4:06 Why not just make it more fields, right? Why not just say what's the voltage? What's the phase two is single phase or three phase? What's the coil condition, good, bad, or better, right?

MARTIN

4:18 I mean, that's fine. If you guys have that option. I just don't know because I feel like that. Yeah, we can come.

BILLY

4:26 Can actually, we might be able to customize them for you. I don't know. I mean, David knows better than me, but I'm just saying I'm not sure that we need, to try to squeeze that into notes when we could make those standard feels and we can make them required or.

MARTIN

4:40 Whatever. Yeah, perfect. I mean that would be great. Yeah, because as part of the form of the ServiceTrade forms, we want, these specific questions asked for this type of equipment. So if you can see water source, these are the, this is the information we wanna see in here. Okay? Everything that's in there, right? And as I go down, I'm gonna show you another one that's different. Now, if you look at a separate like that. Yeah. So that way we're not asking questions that don't pertain to that type of equipment. And that way it fulfills the need of the information that we're wanting to collect.

DAVID

5:18 Okay. Well, you know, Andrew could actually get on it as far as like doing asset overlays for you. Your TAM can actually do asset overlays that's a function that they can provide you with as well. Data integrity perspective on the back end.

MARTIN

5:31 Andrew. Okay. So yeah, these are the things we want to have working with, you know, I haven't finished this. We're actually we're cross referencing the information that we do want for this specific type of equipment. And that way we can fill it all up. Now, the one thing I know and maybe I'm wrong, but, you know, for instance, like we want to have a water source, heat pump to water source, heat pump group, right? And there may be a section where we have, what was one that we were talking about earlier? Was it the VRS it runs? We have, let me see where is it? So we have around unit which we're hoping that it will talk to the box car, airhounder group and box car unit, to the box car around group. Because I know... two different groups in there that I see, but we really don't want to separate them because they're pretty much they work the same way in some cases. So we wanna see if we can keep that information in there.

DAVID

6:38 That's just a, that's a matter of making sure that the asset itself is assigned to that parent. Okay? So it's just making...

MARTIN

6:46 If there's anything that's not part of that parent, are you guys able to link it to that parent group for us that way? There's no, you know, we keep it and, you know, we were talking about, you know, the number of the number of roles that we have, right? I think I mentioned to you how we have like 20 different roles. And I'm like why do we have 20 different roles? We need to clean this up? We should literally only have five roles. We have admin team. We have a field team, we have a managers team and we have a sales team. Why do we have so many different roles created? Why can't we clean this up and just minimize it so that it's functional, right? And only give people the activities that they need to use for their specific roles and not have, you know, one working on something that they shouldn't be touching, right? So we wanna clean that up. And this is the same concept we're facing with the asset stuff because we have all these different if I'm looking at, the different types of asset types that we have in here, you know, when we look at all the different asset types, we have a lot marked up. And I'm like why do we need so much? You know, if I go to that spreadsheet? I think we ended up totally, you know, what was it? 46? And I'm pretty sure that on that other sheet, we have way more than 46. So we're using more. I think we're causing more conflict and more repetitive stuff. Because what me and Tyler have found through the assets as we're doing the services, there's so many different asset types built in, that are overlapping each other. Create a headache for us. Because now when I want to run a report, I don't know what to run it on because I don't know if they placed it under this or that. So we're trying to kinda clean that up as well.

DAVID

8:39 You guys really in the front end did a lot of adoption of all the features that were available to you. But now sounds like your eyes had focused on optimizing your approach to what you guys have set up to.

MARTIN

8:49 Yeah. And if we wanna make it simple stupid, you know, pretty much make it so that everybody understands it. Everybody has the same language. We don't need 12 different languages here. You know, we wanna keep it all uniform and keep things so that the data transfers. When I run a report, I know what I'm running a report on and it makes sense, right? So as part of, the service form, the goal is gonna be that when we, let me see if I can pull that up, give me one second here. Let me see if I could pull it up because I have something blocking my view here. I could move this here. So I'm gonna show you kinda like an idea. Well.

MARTIN

9:35 Hate every time I have to log in, he's he was gonna let me... no third party security is.

MARTIN

9:56 All right. So I'm gonna show you what I have here. Got it. Okay. So where I go for the, our forms, when we have on Google before we started talking about the service forms, this is what we were already working towards. We were actually building a form under Microsoft forms, right? And one of the things we were trying to do is gather all the information as we needed, right? So we can export it and put it into the system. Additionally, as I'm gonna try to say here, where was I going with it? Jesus?

DAVID

10:38 It looks like you're trying to use the conditional functions of service forms to say you select the equipment and it adjusts all those fields that you...

MARTIN

10:44 Exactly based on the questions, why you asked the specific question, it'll generate that. Okay, you have a you're this type of unit, this is the questions that fall under that type of equipment and it will generate the report and then put it into service, right? So that will be, so that's ultimately what we're trying to accomplish. One of the things that I did notice and we talked about here is whenever there's the filters, of course, right? So there's always a question about filters. Let me see if I keeps blocking my view, so I can't see if it's in.

DAVID

11:17 Yeah, that's awesome Zoom is great for that.

MARTIN

11:19 Yeah. So if I go to one of the assets, one of the things that also happens is if I have a specific type of asset, it'll ask me, you know, filter size one two. And then I have to put quantities which to me didn't make sense. And, you know, I have Tyler here to kinda like pick at me and pro make sense of the same thing because he's an outsider looking in at the same time. You know, his experience is not in their conditioning. So it's really good to have second eyes on it. So when we're looking at this, for example, let's see if I could find one. Let's look at this guy. So if I look at a pack oil and I look at the fields that it provides, it will have filter. And then I may, it doesn't give me the allow me to add the quantity as part of that same entry, right? So we're like we need to get rid of this because we're we have, if I put a filter in here, I need to know the quantity right next to it because otherwise, it won't tell me exactly which one of the five different filters I have that are quantity two, right?

--- Pricing ---

MARTIN

12:25 So, for instance, if I put quantity two, right? I think it was it that one and then I put filter size 2020 by two. It gives me another option. Well, I don't know how many of those are actually, which of the, which of the two, you know, I could put 626, but I don't know which one is 10 of each or that I won't be able to know that, right? It would be great. What we're trying to do is make it so that the filter sizes are lined up with the accounts for each specific size. So it makes sense when they're reading it, I got 10, five, 20 by 20 by twos, and I got, you know, another 10 that are 1,620 by twos that would make sense and, they correlate with each other, the same thing for the belts. We don't have the same. It's the same issue with the belt 38. It'll do the same thing. And now I got to figure out how many belts are what. So I don't know how we can make that correlate because that would make sense if I look at an eight 38, and I see that there's only one.

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MARTIN

13:33 And then there's an 855. I mean, I know which one is which and how many of those are they're? All right?

DAVID

13:38 Yeah, that makes sense for the record of the asset itself with the data for the asset. One way you can get this a little bit eased right now would be with your service templates. Every time you generate that service on the job, it automatically puts the quantity of the item that's required for, the service itself that's one way, to help.

BILLY

13:58 Items.

MARTIN

13:58 Underneath the service tab, which the service template on the.

DAVID

14:04 Yeah, service templates.

MARTIN

14:06 So, we use service, the service templates, but when they're doing the maintenance, you know, they typically don't know what belts are needed, right? So we're counting on the technicians to enter the quantity per unit. So, as part of, the due diligence report, right? We ask the same question was the...

DAVID

14:28 When you're gathering the data?

MARTIN

14:30 Think we're gathering it all as part of the data because we don't know ahead of time, a lot of cases. But, yeah. So, you know, those types of things that's what we're looking for so that we can implement it because as you can see, I'm like filter one, filter, two, filter, three, it's a lot of questions. We want to keep it to one and just provide the size and the number of filters or the nine size, but, and the number of adults and one specific question that way makes sense. But yeah, that's where we're looking for in the, and, these fields that we're trying to collect.

DAVID

15:05 Okay. Yes, send down with that team and make sure that they've got a good awareness around that will be important. But like I said right now, as you guys fill out this assets sheet and get it all finalized. Handing this to Andrew. They do data work and overlays like this all the time.

MARTIN

15:18 Okay. So I should send this to Andrew.

DAVID

15:22 Yeah. So, yeah, he got a new project for you.

MARTIN

15:24 Right. He's gonna be so happy. Okay. So, yeah, that's where we wanna see on this, on the due diligence form. And one of the things that we're gonna look for is as part of that. And maybe this is the key thing that we're gonna wanna make sure is, the service form whenever they're entering all this information on the form, that if there's a deficiency that needs to be created as part of that, they can add it all through that same form, right? I'm not sure if it's possible because last I talked to Sarah, he mentioned it would be difficult but being that it's a new unit and new site, new location, new piece of equipment that we're entering the. I don't know if that would be possible since we already provided the models to remember all that other information if it already creates it and just add it into the system. I don't know.

DAVID

16:18 Depends on how the data is submitted because it needs to have a destination asset prior to exactly. Yeah.

MARTIN

16:24 Yeah. So that would be something to kinda look at on that end of it for the service forms. Okay? So yeah, we'll finish this up. We're finishing it up like I said today, hopefully and we'll send it to you. Aside from that, I mean we already did, the due diligence. I mean, the deficiencies through the service plumbers that appears to be working really well. What other issues have we run across that, we had some, they sent a notice about it and they're we're supposed to be sending back anything that is not working, right? I know we had a listing of things that we needed to review.

DAVID

17:09 Well, I've got my little document that I've been keeping track of everything. Okay? If you want to let me share the screen though?

MARTIN

17:14 Yeah. Let me stop here. That looks better. It's bigger.

DAVID

17:20 There we go. This is what we've been working on. So the asset overlays looks like a new task that we need to get done due diligence scoping call. And then we've got the feedback for service portal tomorrow with Jamie. Stella. That was the last big thing that we had to knock off, the list here.

MARTIN

17:38 Okay. Just review or item status and what's his name, Andrew was working on, that new analysis for the items we worked on that. So, we review that with him and he was working on that and providing is something a little more concrete on reporting side of it.

DAVID

18:02 Good. Yeah, because it was live last Tuesday and you guys had your last TAM meeting with him Thursday to go over some weeks, good.

MARTIN

18:09 And then, he did talk to me on Thursday about the user access to the toolbox. We did notice a couple of people were not able to see the updates but that was because they needed to sign off so that they can see the update. And then I saw a note on the time card. I did see something on the time card regarding, the check off. I think.

DAVID

18:33 Yeah, we looked at that just mock up last week on what they've been working on putting in the customized verbiage. So, you know, if that's something that's suitable for your needs from a HR and legal perspective that's something to speak internally on your side about.

MARTIN

18:51 Now, on the spectrum transition or implementation... one, one thing that I had a question on is, I know we need to set up something with Martha. It's just, we've been trying to figure out how we're going to present this review things. One of the things I was gonna ask you, is there anything that we could do? Where, if we, I mean, I'm trying to think of how we can export information from ServiceTrade that would be able to be imported into spectrum into the work order module? I don't know if there's anything that can be done that way because like I said, the biggest challenge we're having is they don't want us touching the job module. They want us to be focused on the work order module, which is different. And I did send, I'm not sure. Did you receive the information I sent Martha regarding that? Let me see what I sent. Martha. I sent her this because I was like, well, how is it that I can't do this? But again, you know, I'm just me, I don't know.

DAVID

20:02 And she would know, I mean, Martha would be the one that ask the questions too. She's pretty knowledgeable when it comes to spectrum.

MARTIN

20:09 Yeah. Let me see.

DAVID

20:11 Cause we can do customize exports with the tool that we call stack it's our.

BILLY

20:15 Wow. Yeah. That's true. But Martha has overseen... two integrations already using the newly purchased tremble technology called rivot. So because tremble owns it and is leaning into that as a new way forward for customers to do innovative things. It would be my strong suggestion that you have Martha or whoever architect this as a rivot project for it to be sustainable?

MARTIN

20:59 Yeah. So I sent you guys the email I sent her back in may third regarding that. And then the person that so in that email as well is our controller. She's pretty involved and she said as soon as she heard jobs, she says no, I'm like, okay, well, that's not good. I'm trying to come otherwise but they won't budge on me.

BILLY

21:23 Yeah. So that's fine. But I don't know what rivot supports or doesn't support. I don't know how Martha thinks about it. We just, we just can't be an expert at spectrum. And so we have to defer to people who make a living doing that.

MARTIN

21:41 Exactly.

BILLY

21:42 And so you might want to ask a second opinion of someone other than Martha who's an expert at rivot, yeah. And that rivot of spectrum, but I would strongly suggest getting that rivot technology group involved because they've got a very strong charter to make things like this integration, a reality for people like Ari.

MARTIN

22:07 Yeah. And, and I did talk to a company that's local because they're actually one of the electrician electrical companies that are in town here and they have spectrum as well. And actually they do the electrical work here in our building and I was talking to one of them and they told me to have spectrum and I was like, what, okay, what do you guys use as a field system? And they use with building ops? So I did talk to them about it on how their integration is, and they're doing the same thing like what Martha is doing with jobs. But, you know, we're not able to do that. They just want us. So it makes sense that they have it because they use jobs as their format to do other field service stuff. We wouldn't have that out. We don't have that option. Yeah, that's the challenging part of it, right? But yeah, that's kinda where. So I sent her this information because I think this was a release that was just sent out. I think April this year about the work order Installation properties that's on that attachment on that email. I sent you. And I sent that to her to see if she could give me any feedback on it. And I don't recall if she ever did or not. But I sent it to her so that's kinda where that is with, the integration? What are the things that we have that we need to get resolved at this time? Do you know anything? No. I did ask for. I don't know maybe you can follow up with Ram party.

DAVID

23:42 Right. Ryan.

MARTIN

23:42 Had Ram, is it Ram?

DAVID

23:45 Hard?

MARTIN

23:46 Rain. Hard. I'm trying to spell his name. I'm sorry, rain. Hard. Yeah. So we asked about, we talked about, the, some of the visual things that are happening on the app, right? Where, like if it's a deficiency, things like that, I gave him. I asked them if there's a way that we can remove the all tab and make it just job so that if the technicians working on a job that was approved, the deficiency is already related to the job that they are assigned to. That way they can update that deficiency because right now they would have to look for it... you know, it's kinda like see, let me see if I have it in there. There was there were going back and forth on it and he said there was Progress on it and trying to see where it's where it fell on to.

BILLY

24:50 Guys, I got to run to catch somebody before they leave. I'm gonna leave you with David, but Martin, I'll probably call you later this week just to catch up for a few minutes. Okay. Thanks bye.

DAVID

25:04 Right. Bye. So, yeah, Ryan heart was kinda walking you through just, you know, mobile app functionality. Is that right?

MARTIN

25:12 Yeah, that's right there's. Some, I'm trying to think of where I sent him the email because I sent him an attach.

DAVID

25:21 I...

MARTIN

25:21 And I said, is there any way we can make this work? See... I'm trying to see if I could find it. There's just so many emails that go back and forth... that one. And I think I sent the Billy too, so... maybe that's where it started and.

MARTIN

25:52 There you go. Find it. I'll send it to you.

DAVID

25:57 All right. So, it sounded like you're wanting just a section on the deficiencies panel that is for job specific deficiencies that are out there to be result.

MARTIN

26:08 Well, what, this, what doesn't make sense, is that if you're on the app under the tile for the deficiencies, it tells you like there's 200 deficiencies, and that's not accurate. You know, I know, there are 200 deficiencies, but that's a combination of both open and fixed it, right? I don't even know why they count, the ones that are fixed because you really wanna focus on the ones that.

DAVID

26:31 The stuff, yeah, the stuff to do, right?

MARTIN

26:33 Yeah, exactly. So I said, why is, why can't that number just be of anything that's showing as open and not fixed? That was.

DAVID

26:41 So like the overall number on the front tile piece, just have that.

MARTIN

26:45 Exactly. There was that. And then the second thing I was like, why do we have an all tab? If I can see the both open and fixed? I mean, it makes no sense. Why can't we put one that says job that way? That if I get a quote approved and there's a deficiency that was assigned to that quote and they approved it and putting it into a job, that deficiency automatically moves over to the job. And then when the tech arrives site, they hit the job tab on it on the deficiency and they're right on it. And.

DAVID

27:15 Like, the service specific deficiencies, and also the open one. So you wanna know what's already been like approved for work that you're being sent out there to do. And then like also, hey, while I'm here, I also have all these other parts that I can go ahead and like upsell or just get done while I'm here out on site.

MARTIN

27:33 Exactly. So those are little things that I'm kinda, I know that I know he was emailing me back and forth. The last time. I think the last time we talked was, what was it? That was the end of? I think it was the end of March. That was the last time we talked and it's been a while now. So I wanted to kinda see where things were with it if you got any success in it and so on. Yeah.

DAVID

28:02 And, you know, the mobile app itself kinda is it follows production in the main account in, you know, core service trade, right? Yes. So, you know, and each one of those products have their own development timelines and schedules for releases for new things that we have on the horizon. So having the conversation like you've started with rynhart earlier than later is definitely easier for them to take a look at. Okay, maybe this makes sense with the changes we're making overall to the core product in the application and see if they can lay it in there. It's just, I don't you know, when it comes to scheduling and tying that stuff into product development, it's a very nuance thing when there's already a list of bucket items that need to be checked off the list to begin with. So.

MARTIN

28:47 Yeah. Okay.

DAVID

28:50 Continue to ask. I mean, that's something that would like I mentioned a second ago, have to be tied in to the already existing, you know, timelines that we have for innovation that's coming.

MARTIN

29:02 Yeah. Okay. Yeah. I mean, that's what I have so far. I'm trying to think of what else we got other than just fixing our roles. And, you know, we're doing a lot of on our end of it so that the data, is documented, right? And in the right place is stored in the right place. So that way it eliminates some nonsense stuff. And then we also cleaning up all the quotes. I cleaned up a lot of our old quote them all change their status to where we cancel them all, cancel quotes that are from 2020. And I think it was 2022. Yeah. Anything prior to June 22. Yeah. So we change the status because there's really no need for them to be there. They're accessible if we need them as a template, for future, but it's we're cleaning this.

DAVID

29:58 Just kind of a stale opportunity at this point and.

MARTIN

30:01 Exactly like why you didn't have that in there. So we clean that up and we did the same with the deficiencies. I think we may need to do a little more on the deficiencies, because that's part of the whole customer portal side of it that customers are gonna see anything that's showing open. And if it's old and I don't want them to see stuff that's hasn't been resolved, you know? So I rather just give them the...

DAVID

30:24 Most up to date information as possible. So that way they don't drown in too much information and they just see what they need to. So they can.

MARTIN

30:30 Exactly for that. And it also tells, the customer that we're up to date on. So it is like, why do I have this not working well that's from a year and a half ago?

DAVID

30:41 Yeah.

MARTIN

30:42 That doesn't look good on our part. So we're cleaning that up. And then we should be good.

DAVID

30:48 Well, I think just mentioning the new project for Andrew on those asset overlays will be a big one. And that's going to be really core foundational legwork to make happen prior to that due diligence, being able to toss things in the right destination and also have the fields available on that form whenever the tech opens it up... and then have started that conversation with Martha. I think internally would be the best way to convey, you know, that's why this works this way. And then also she can engage the rivot team to discuss, hey, what would it look like for things to pass over to work orders as opposed to jobs? Yeah. Okay. Now.

MARTIN

31:26 The Jamie question, where are the tables for the quotes and job descriptions?

DAVID

31:31 Yeah, man. Let's find out tomorrow. When we talk to Jamie, Stella, he's yeah, he's the head of product. So, he...

MARTIN

31:38 Okay.

DAVID

31:38 Yeah.

MARTIN

31:40 We're gonna drown him and stuff.

DAVID

31:42 Well, let's say, focus on the high level needs at the moment.

--- *Wrap-up* ---

BILLY

31:46 All right. We got.

DAVID

31:47 30 minutes with them tomorrow, but, yeah, that was something else. I wanted to make sure we didn't forget to ask him since the call.

MARTIN

31:55 All right. Well, that's all we got for now, but we'll get.

DAVID

31:58 Okay. It sounds good. Well, I'm gonna go ahead and tell Sarah and Jamal you guys are good to go with the existing forms as it was, and then we will line up that scoping call with the service forms team when we get that asset overlay stuff a little bit further down the road.

MARTIN

32:13 Wonderful.

DAVID

32:14 Okay.

MARTIN

32:15 All right, man. Well, thank you very much.

BILLY

32:16 Yeah, thank you all.

DAVID

32:18 All right. Appreciate it. See you guys bye.

The End