



ServiceTrade Demo with Allegheny Refrigeration Service Co

Brett Griffith with Allegheny Refrigeration Service Co
Recorded on 4/18/23 via Zoom, 33 min.

Participants

SERVICETRADE

Brett Griffith
Territory Manager

Quentin Cain
Territory Manager

ALLEGHENY REFRIGERATION SERVICE CO

Rob Radzevich
Owner

OTHER

Brett Radzevich

Topics

| | |
|--|-------|
| <i>Purchase decision</i> | 2:03 |
| <i>Accounting integrations</i> | 2:52 |
| <i>Invoicing</i> | 3:20 |
| <i>Accounting integrations</i> | 3:44 |
| <i>Invoicing</i> | 4:35 |
| <i>Parts management (inventory)</i> | 5:59 |
| <i>Accounting integrations</i> | 6:32 |
| <i>Purchase decision</i> | 6:57 |
| <i>Type of work</i> | 8:21 |
| <i>Implementation and ongoing support</i> | 8:35 |
| <i>Purchase decision</i> | 8:53 |
| <i>Accounting integrations</i> | 10:06 |
| <i>Paper process</i> | 10:19 |
| <i>Parts management (inventory)</i> | 10:42 |
| <i>Purchase decision</i> | 12:49 |
| <i>Access to information</i> | 13:38 |
| <i>Tech On-site</i> | 14:15 |
| <i>Dispatch</i> | 14:31 |
| <i>Type of work</i> | 15:19 |
| <i>Dispatch</i> | 15:45 |
| <i>Type of work</i> | 16:27 |
| <i>Paper process</i> | 17:09 |
| <i>Recurring maintenance</i> | 17:26 |
| <i>Dispatch</i> | 18:04 |
| <i>Accounting integrations</i> | 19:15 |
| <i>Dispatch</i> | 19:37 |
| <i>Accounting integrations</i> | 20:45 |
| <i>Access to information</i> | 21:35 |
| <i>Invoicing</i> | 22:11 |
| <i>ST app contracts and pricing</i> | 22:31 |
| <i>Customer engagement (quoting and invoicing)</i> | 22:48 |
| <i>Invoicing</i> | 23:23 |
| <i>Accounting integrations</i> | 25:32 |
| <i>Parts management (inventory)</i> | 26:25 |
| <i>Purchase decision</i> | 26:57 |
| <i>Accounting integrations</i> | 28:05 |
| <i>Purchase decision</i> | 28:44 |
| <i>Dispatch</i> | 29:01 |
| <i>Purchase decision</i> | 29:44 |

Transcript

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

BRETT

0:00 Hey, good afternoon, Brett. Can you hear me?

ROB

0:02 Yeah, I can hear you.

BRETT

0:03 Awesome. I just wanna make sure I'm saying, is your name Brett or Robert?

ROB

0:09 My, my legal name is Robert, but I go by Brett.

BRETT

0:15 Interesting that's how did you get that from Robert?

ROB

0:19 Is my original name? I legally changed it when I was 16, just honor the family on the third. I wanna be a second.

BRETT

0:34 No worries. I just wanted to clear it up, make sure I wasn't calling me the wrong name, but Brett, thanks for joining me today. My name's also, Brett, I'm inside territory manager here at ServiceTrade for the northeast. I know maybe a month two months ago, you had met with one of my colleagues, Quinton and you kinda went through the process with him. And I know today we're meeting really just to have a conversation. Is that kinda how Quinton phrased it for you?

ROB

1:00 I mean, he was great to deal with very easy to, you know, understand everything. So, yeah, it was just, he showed us the product went through everything.

BRETT

1:14 Okay. And so I was, you know, looking back at notes, I did talk to quit and all that stuff. And it sounds like it was more just an internal reason that you guys didn't move forward. You had a lot going on. I know I LinkedIn message you a few months

ago too. You told me he was super busy which is understandable in your world. But what kind of made you take another look?

ROB

1:36 So, we've had we're a small business and we have had a lot of our employees are, you know, they would stay with us 10 15, 20. And we've had one stay with us for 50 years, and we've had high turnover in our accounts payable position recently to the point where it's insane in our process for our invoicing is nuts.

--- *Purchase decision* ---

ROB

2:03 So that the major factor with just condensing that position and making it a lot simpler. And the issue now is we are going into summer which is our busiest time of the year to the point where we can't even take on new clients. Yeah.

BRETT

2:23 Yeah, understandable. So, are you, quintan told me? I know you have the recording. I know you know, what ServiceTrade? Does you went through it? Like you said, Quinta covered everything for you? Is this something like, do you have specific questions about the product? Is it something... really just trying to figure out? Like do you need to see another demo? Do you have specific questions? What would help you?

--- *Accounting integrations* ---

ROB

2:52 So, our main thing is we went with verizon work a couple of years ago is what we started with. Just, it was an introductory, you know, dipping our foot into the water because we were pen and paper five six years ago and the whole thing with them was syncing from Quickbooks to, you know, this program and doing the invoicing straight from the program.

--- *Invoicing* ---

ROB

3:20 And I will go straight to Quickbooks. Push the button whatnot, and it didn't work. So it did save us some time regarding not waiting for our technician to finish his field report or do his billing or collecting checks, blah, blah, blah, but it's still the main purpose of it didn't work.

--- *Accounting integrations* ---

ROB

3:44 So that would be the main thing is, you know, they promised the us the world and it didn't work. So making sure that it will sync with Quickbooks. I know the

newest version just came out. We upgraded to it. So we're on desktop 2023 okay? Perfect.

BRETT

4:07 So, as you know, I'm sure you covered with Quinton, we do have that integration with Quickbooks. It is a native integration. We will work with every single version that they offer. And... in the process with Quinton, did he show you like the video of how the physical integration?

ROB

4:26 He might have, it was so far from the go?

BRETT

4:30 Yeah. I understand. You're so busy, you got so much going on. It's hard to remember.

--- Invoicing ---

ROB

4:35 You guys do it natively, you don't have to use a second program.

BRETT

4:41 Now, there's a button in ServiceTrade says sync to your accounting system and we would just hook it up to your Quickbooks desktop account. So essentially, we would take you all the way up to the pro forma invoice inside of service trade, push that button. And then the invoice identical match would be pushed into Quickbooks in which you could continue billing like you guys do today.

ROB

5:01 So, is there a delay at all on that?

BRETT

5:04 When you push the button, it goes over.

ROB

5:07 Really? So I've done a few other demos got, I can't even think their name, it was one was service something else and I've done BuildOps and every single one it's with their Quickbooks. They have to use a middle program because I guess desktop is terrible.

BRETT

5:33 Interesting. Yeah, we've been connecting with Quickbooks desktop for years. We've been around for about 10 years and that was one of the first integrations we built out. But now it's very much a click of a button invoice goes from service trade,

one way sync into Quickbooks and just copies all the information over into the correct revenue account that we map out for you guys essentially.

--- Parts management (inventory) ---

ROB

5:59 Okay. So we would be able to, I think part of the reason it wouldn't work with verizon was we have multiple, I'm sure Kathleen, my mother, she was also on the meeting with Quito. So I'm sure this is probably in the demo, but the main reason it wouldn't work is we have, you know, labor mileage parts and when they're posted, they hit different general ledger to their accounts. So I think that was part of the issue with the build out.

--- Accounting integrations ---

BRETT

6:32 Okay. So, are you saying Brett the big concern last time was the Quickbooks integration that's kinda why it fizzled out.

ROB

6:41 Correct that. I wouldn't say that's. Why it fizzled out. It was we just got too busy.

ROB

6:52 Right now, with our current over, she's out there doing that position.

--- Purchase decision ---

ROB

6:57 You know, I'm technically fresh new into the company. So I've been trying to take on as many roles as possible to, in that sense. So we've all just been two slammed and in the summer here, we're going to be two slammed. I have.

BRETT

7:16 How far out is your busy season? Like two weeks a month?

ROB

7:21 Yeah, I'd say a mid may is when it starts and then it won't let up until... probably August, okay?

BRETT

7:37 So tell me we're sitting here on this meeting today, just kinda figuring out where we're at. Are you guys actively looking to make a change? Like I understand it would be after summer after the busy season. But is this something you're actively thinking about? Did you just take the meeting because Quentin called, what does that look like for?

ROB

7:59 No, I think we're definitely actively looking for something even if it's something that I could work on in the summer alone and getting, you know, if we start a little bit later into the summer and getting the back end ready so that after summer, I could, you know, we could roll it out. That would be, you know, something we could.

--- *Type of work* ---

BRETT

8:21 Okay. That's what I would recommend as well. I don't see a lot of mechanical refrigeration contractors implementing software in the summer. For the exact reason you just mentioned you guys are so busy. You have more to think about than implementing software is not one of those things that you can handle.

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

BRETT

8:35 So that's very understandable basically how it works on the service trade end is we have a concept of service delivery windows and that's just the earliest we can get started on implementing your account. We're typically about a month out like today. April eighteenth. The earliest I can start implementing accounts today is 515.

--- *Purchase decision* ---

BRETT

8:53 So may fifteenth... if it makes sense for you guys, I would recommend going through the evaluation again, determining if this is something you guys want and signing up before the busy season. That way when busy season is over, you can just jump right into implementation.

ROB

9:10 Yeah, I'd have to look at the program again. I don't you know, off the top of my head, I can't remember what it looks like. I don't have to watch the demo over. I remember, you know, we all like it. We didn't have, you know, any major concerns in that standpoint because I've had somewhere, you know, I wouldn't have taken this meeting. I wouldn't we're not, we're.

BRETT

9:36 That's kind of what I figured. So, Brett you tell me, do you want me to provide you a demo today? Do you wanna watch that recording? What would help you most?

ROB

9:45 Yeah, I mean, if you can just pull it up again just so I could, you know, wrap my head around it again just to know the main thing to the UI because we kind have a split... system here where some of us, some of them like a job board, some of them like.

BRETT

10:06 Yeah. So if you wouldn't mind kinda just sharing, you know, I have notes on what was important to you guys last time and, you know, it was the sync to Quickbooks as we just talked about. It was you guys currently in verizon don't have a lot of reporting capabilities.

--- Paper process ---

BRETT

10:19 So it's hard to tell, you know, who's tracking to the goals you guys wanna be at. A few other things mentioned were field workers, productivity. It's just simply not an easy platform to use and maybe they're wasting more time than saving time in the field. And the last thing was your part manager just has the trouble seeing what parts were used and maybe you guys are losing money. There is all that pretty accurate.

--- Parts management (inventory) ---

ROB

10:42 I'd say that's pretty accurate. Our parts isn't a huge issue. The main thing with that is keeping them up to date in terms of pricing because it's you know, cost, there is variable that would be great. I have that in... horizon work now, but it's more of a bulk thing and I have to import and export a part list and it's a nightmare because we use, you know, there's probably we don't even keep an inventory. It's 40,000 skews.

BRETT

11:17 Okay. So you don't have truck stock or warehouse stock currently?

ROB

11:23 Technically, no, you know, they keep common part in their truck. We don't even, we don't track it. We don't really have a way to... it's a nightmare.

BRETT

11:35 Okay. Gotcha. So, is that where you, would it be beneficial to find a program that does not only service management but also EO generation and inventory management? Is that a goal?

--- Parts management (inventory) ends ---

ROB

11:50 I think way further down the road. Sure. I think for right now keeping it simple and just, you know, decreasing the workload on the back end. In general, the app, the guys are used to horizon work and it's not great. They have to hit like 12 buttons that, you know, all half the words are the same started accepted on the way it's finished completed. It's confusing on that end. So, the UI from the technician standpoint is it's not the best. It's not terrible. Okay. You know, it's workable.

BRETT

12:39 But it could be better. And I think that's that you're always gonna run into that.

ROB

12:43 Yeah, I think it could be a lot simpler for what it really is. Okay?

--- *Purchase decision* ---

BRETT

12:49 So kinda what I can do for you today is I can offer, you know, high level overview of service trade. If there's specific things you see that you want to dive deeper into, just let me know we can have a conversation about those. But really the goal is to give you a refresher remind you what service trade is and why you looked at it the first time, why you went to deep process last time. And then from there, if it is looking interesting this time as well, we can kinda determine a plan moving forward before you guys busy season as far as adopting new software, whether it's service trade or something else. Gotcha. Okay. All right. So let me make sure I have everything. All right. I think we're good. So you're seeing my screen, correct?

--- *Access to information* ---

ROB

13:38 Correct. So.

BRETT

13:40 What you're looking at right now is the dashboard. This is the very first thing that you see inside of service trade when anyone in your company logs in from the office, so important to point out service trade is cloud based. So all you need to access it is internet access in a browser from the office. All you're texting in the field of some type of mobile device, whether that's iOS or android. We are compatible with both. But this page right here is really going to give you visibility into your schedule. So daily schedule, you've got all the jobs. You're going to the perspective technicians that are going to those jobs and at the locations they're actually performing the services.

--- *Tech On-site* ---

BRETT

14:15 At. The cool thing with this is as your text are completing these jobs, you're gonna see these check marks in the office. Whoever is reviewing work orders, preparing them for invoicing can see here's. The ones that got to go process. The other ones haven't been completed thus far.

--- *Dispatch* ---

BRETT

14:31 This page is also giving you the status of all your different appointments. So job and work order mean the same thing as the inside of service trade. If you guys do have any overdue job that don't have those appointments on the calendar, we'll let you know front and center that hey, you need to schedule these. Inevitably everything's gonna be a due at some point. So we're also letting you know about jobs do in the next two weeks. So they don't even make it to that overdue status. Would you say Brett that you guys are ever missing jobs just because there's not a simple way to track it.

--- Dispatch ends ---

ROB

15:01 No, I'd say that's not a huge issue there. So is this dashboard customizable at all? Or is this how it comes?

BRETT

15:10 This is how it comes. Service trade is kind of an out of the box solution.

ROB

15:14 Okay. So a lot of what we do is not appointment based.

--- Type of work ---

ROB

15:19 I'd say that... it's probably 80 percent of what we do. It's too hard with priority. We have to take a lot of priority for walking coolers to main source of our business. And we have to prior prioritize the bat over a, you know, some bars, little secondary ice machine.

--- Dispatch ---

ROB

15:45 So we really don't do appointment based. Also because of we send a take out in the call, you know, it sounds like it's an, our job and it turns into a four hour job. So it's a little bit tough in that standpoint. So generally, right now we use a job board. She, our dispatcher uses a combination of the job board and a scheduler where she, they're scheduled, they have their eight calls for the day and then she can bounce into the next.

BRETT

16:17 So correct me if I'm wrong here, but it's sounding like majority of your work is more or reactive versus proactive. Like do you guys have service contracts with majority of your customers?

--- Type of work ---

ROB

16:27 No, it's yeah, it's usually reactive and we really only a couple of the change we have service contracts with. We do a lot of smaller restaurants and bars and whatnot on that end. So we don't have a contract with them.

BRETT

16:45 Is there any goal to grow that side of the business, the service contract or service agreement side?

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

ROB

16:50 I mean, it'd be great. I, you know, I think it's a tough thing to do right now with the labor market. You know, we just can't get enough of.

BRETT

17:02 Understandable. And kinda, we're very aware of the labor shortage as well. It's been affecting this market for at least the last three to five years.

--- *Paper process* ---

BRETT

17:09 It's even worse now than it was five years ago though. So kind of what we've found is using technology to make both the text job easier and the office staff easier. Is one of the easiest ways that we can get around with doing more work with the staff that we have in place today.

--- *Recurring maintenance* ---

BRETT

17:26 And I will let you know, I'm sure Quentin covered it in the process a couple of months ago. Service trade is built around, you know, our biggest customers are performing a lot of recurring work. They need help managing those recurring services and ensure that they're not missing any appointments for customers.

--- *Recurring maintenance ends* ---

BRETT

17:42 So I think that might have been a little bit of disconnect last time... but that's just off the back what I'm here.

ROB

17:51 Yeah. Yeah. I feel like that. That's a little bit of a tougher thing. So there is no way just to see every open job at once. So.

--- *Dispatch* ---

BRETT

18:04 There is, there's a couple of different ways we can. Yeah, if you wanna kinda steer me, I can show you different things. So if I wanted to see every open job... I would go... in complete services on this report. And there's all these different parameters that you guys can narrow the search down by. But there's 2,500 results. There's 25 open or incomplete services. And this is every single one. Now, you could go into these jobs and kinda figure out what needs, what specifically the other way to do it that I'm thinking of for you because it sounds like maybe the dispatcher needs to see all the open jobs so they can schedule it. Is that kind of what you're getting at?

ROB

18:48 Correct? Yeah. And it's also, you know, location based. So I'm not gonna send one across the city because this person's right there. So we, we've started using that function within verizon work too and it will show us within a map based of where our calls are.

BRETT

19:08 Okay. Do you prefer the map based or do you perform more of a job board type situation?

--- Accounting integrations ---

ROB

19:15 Personally, you know, I haven't got a ton of the dispatching, I've done it here and there in the past. For me. The map based was the easiest but I think the job board is mainly what she uses.

BRETT

19:31 Okay. So realistically we've got both... service trades, a really robust platform.

--- Dispatch ---

BRETT

19:37 You very well might not use 100 percent of the platform but really it's made the way it is because different customers use different things. So I'll show you both. I'll start with the job board here. This is essentially our dispatch board and you ask the question, I wanna see all my open jobs. So how this works is all your text are over on the left hand side. This is me for example. And here's my swim Lane horizontally across the screen. I'm scheduled at comcast center at two 30 just when our meeting began. But if I'm the dispatcher in the office and I need to see every available all job. I'm gonna click over here. Each job is broken down by job type. So your dispatcher can see, I've got a bunch of service calls. I can sit over, got to install some PMS and then the dispatcher can go in and kinda drag and drop these to the technicians that they want to send. So if I take these service calls, I'm gonna schedule my boss Anna. I would really just go in and build out her schedule as I see fit. And this is across all of your technicians here. So kinda up to you guys as far as how you want to schedule things in that regard. But does this look like something that might be helpful for your dispatcher?

--- Accounting integrations ---

ROB

20:45 Yeah, that's nice. That's...

BRETT

20:47 What we...

ROB

20:48 Use now, it's a better version.

BRETT

20:51 It. Okay. Is there problems with the dispatch for today? Like tell me aside from the Quickbooks integration, why would you guys move from?

ROB

21:04 It's honestly, the major thing is the Quickbooks implementation, you know, the customer support, it's.

--- Accounting integrations ends ---

ROB

21:14 You remain on hold for four hours. It will go down for a day at a time. And there's no update. There's no emailing. There's no. Hey, it's back up or knowing that it's down?

BRETT

21:28 Down, how do you guys work?

ROB

21:30 It's down. We have, they have a classic app.

--- Access to information ---

ROB

21:35 So the technicians can, they have to go into a separate app and add their own calls to it... and type everything in. And then once it's back up, it'll re, sync with the server. We have issues with a server syncing. Just on their end. It just won't sync. We have lost photos constantly... the billing on it's. Not right? It's not hard, but it's a little finicky.

--- Invoicing ---

BRETT

22:11 Okay.

ROB

22:11 So, do you guys have a credit card process or implement implemented inside of the program?

BRETT

22:19 That we do? So, the one thing I wanna point out before we talk about that ServiceTrade is not an accounting system. I'm not gonna replace Quickbooks by any means. I said if I take a set up a job, let me find it.

--- ST app contracts and pricing ---

BRETT

22:31 If I take this job right here, whether it's a PM job, it's a service job, whatever it is in the office, I can complete it and create the invoice. This brings you to this page where you can make sure they contract pricing for this customer is correct, if they're under contract, if not leave it blank.

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

BRETT

22:48 You guys review your unit cost for all the items on this, and I can create the invoice. And then it brings me to my pro forma invoice right off the bat. I see my margins are way off. So I'm gonna go ahead and fix that. See what's wrong right here. We don't have a mark up. So I adjust that, mark up my margin changes on the job. I save that in. And then when I send the invoice to the customer... I'll send it to myself here. This is what it looks like. So, it's say allegani refrigeration at the top, you guys break it down.

--- Invoicing ---

BRETT

23:23 If you want the customer to see full line items, great, if not grand total up to you guys, what they see, but excuse me, they owe 800 dollars. They can come at the top through our credit card processing software. We use a merchant service called stacks S tax. They can see you guys with the credit card or with AC H, right? Through service trade. When that happens, you can then reconcile the payments between stacks and Quickbooks.

ROB

23:49 Okay. So we would have to mainly enter payment notice into Quickbooks. It wouldn't go over with the invoice.

BRETT

24:00 No, it would go over with the invoice.

ROB

24:02 It would. So, so basically, we would have to take payment or at least if we want to keep an accurate, you know, invoice count on whatever pass to count. It would, we would have to be taking payment within service trade or at least marking payments within.

BRETT

24:20 Yeah. So if you take the payment via service trade through this method, I just showed you it'll mark everything automatically, and then you'll just have to push the information of Quickbooks for tracking on the back end. But if you guys did go back to the screen and just send it to the accounting system and build that way, like this is Quickbooks desktop, then it would require coming back into service trade and marking what was paid. We like to tell our customers. Service trade is the record of truth for everything service related. So, if you take the payment here, everyone can find it in service trade because chances are not everyone in the company has access to Quickbooks, but everyone in the company can have access to ServiceTrade. So.

ROB

25:00 Whatever say we make this invoice, we already sent it to Quickbooks, and we receive payment, we just have to hit a button. We just hit for payment received. Yeah.

BRETT

25:12 So down here under payment, you could say out of payment, add the reference number, what the date was, who the customer was, and how they pay you. I would save this in.

ROB

25:23 It would go back over again automatically.

BRETT

25:27 We'll save that. And then this information can.

ROB

25:30 Over to Quickbooks.

--- Accounting integrations ---

ROB

25:32 Gotcha. Okay. I mean, that seems pretty standard. I haven't heard of a two way sync with Quickbooks and another program yet. Yeah.

BRETT

25:44 Yeah, I think there's a few out there. But realistically, when you get into the two way sync, things start to break. So I think that's why majority of companies you've spoken to don't do it.

--- Accounting integrations ends ---

ROB

25:57 Makes sense.

BRETT

26:02 Okay. So it sounds like we can help you on the invoicing side of things as far as getting everyone on the same page, would you agree?

ROB

26:11 Yeah, I agree. It's about what I expected in terms of that. And the only thing is, so for your part, you're adding say or 22?

--- Parts management (inventory) ---

BRETT

26:25 Refrigerant?

ROB

26:28 If I update a part on a certain invoice, pricing wise, would that update to that part of, you know, just say inventory or whatever. Would that update there for all future invoices is a customer base where I can insert a certain discount for them?

BRETT

26:48 So, if I were on a work order and I updated the price, it would not affect my part list, however, it would only affect that work order or that invoice.

--- Purchase decision ---

BRETT

26:57 But to the other question there, if there were a discount or a mark up rule, you can do that on a customer by customer base.

ROB

27:05 Gotcha.

BRETT

27:12 And so I think where I'm a little lost Brett, is... you guys have been through this evaluation? Who would we need to get involved for you guys to make a serious decision about this? And what would we need to do in that process?

--- Purchase decision ends ---

ROB

27:33 It would most likely be Kathleen who is she's taking over our account payable role right now? Since we just lost another person in that. So to really get this pushed, you know, I would just really just need to show her another demo and get her eyes on it again, just so she, you know, remember, I think we did the original one six, seven months ago. Yeah.

--- Accounting integrations ---

BRETT

28:05 It's been a while, yeah.

ROB

28:08 Just getting your eyes back on it, you know... that's really it and then going from there in terms of, you know, finding the right time to get it implemented, yeah.

BRETT

28:23 I might add one other thing there just so you guys are comfortable with the Quickbooks integration. I have someone on my team. She's a Quickbooks expert, is what I like to call her. She actually came from one of ServiceTrade customers. She was the CFO at one of ServiceTrade customers, and now she works at ServiceTrade helping our customers. I would recommend if we can get Kathleen on a meeting.

--- Purchase decision ---

BRETT

28:44 Our next step might be having Diane, my Quickbooks expert, join a call with Kathleen just so you guys know everything about the integration. And then, yeah, we could talk about that onboarding process as far as how long it's gonna take and what it's gonna take on your guys end. Does that sound?

--- Dispatch ---

ROB

29:01 I believe they may have already spoken. I don't believe I was in that meeting, okay? But I wanna say if I remember correct, I went and had her on a call.

BRETT

29:17 Check... it looks like he did. And that was in August of 2022. So, yeah, it was solid eight months ago.

ROB

29:28 Yeah.

BRETT

29:30 So, I might rely on you a little bit, Brett to ask Kathleen that's your mom, right?

ROB

29:35 Right, correct.

BRETT

29:37 I might rely on you a little bit to ask her, hey, you know, if we can go through the service trade demo, which I'm happy to provide to you guys.

--- Purchase decision ---

BRETT

29:44 Does she need another meeting with her Quickbooks expert or not? But do you think you could help me set up a meeting with Kathleen?

ROB

29:53 Yeah. I think right now, no shot just because, you know, her usual responsibilities here, she has. And then on top of, she's doing a whole another job right now, there, she is slammed.

--- Purchase decision ends ---

ROB

30:11 We're hoping to hire someone here, hopefully a week or two as a replacement. So once we have that person, we have some stability, I don't there's no problem there.

BRETT

30:26 So what I'm thinking is... what if we give, it sounds like now is not the right time you guys are slammed. You're trying to hire you're? Not thinking about software right now? What if we give it two or three weeks and I give you guys a call in the office determine if you hired that person to handle the ap side of things. So Kathleen's time is freed up a little bit more. And from there, what if we schedule a meeting with?

ROB

30:49 Yeah, sure. That's no problem.

BRETT

30:53 Let me tell you. I'll look at my calendar right now. See it's the eighteenth. I'll give you three weeks because I understand even if you hire someone you're gonna need to onboard them and that's gonna take some time. So what if I give you a shout on like may tenth that's about three weeks out? Yeah, that should work. Okay. Is there a certain time of day that works best for you?

ROB

31:19 No, who knows around then.

BRETT

31:23 That's fair. I'll aim for noon just because I know that that's probably lunchtime I won't take too much of your lunch time up, but it'll be a quick call to see how you guys are looking as far as hiring that person, if we want to schedule it, then fantastic if we need to push out a little bit more, that's totally fine as well. Sure. I... just write this in my notes.

BRETT

31:49 Okay. All right. That is on my calendar, so I will not forget, but it sounds like not much will happen without Kathleen. Is that right?

ROB

32:07 Yeah. Let's say so for now.

BRETT

32:10 Yeah. So I wanna give you another demo, but I think just what I've seen in the past, I've been doing this job for four years. I think it would be most beneficial to when I call you on the tenth, get a demo with both you and Kathleen because you're kind of different parts of the business and we can show you how technology can make both of your lives easy.

ROB

32:27 All at once sure.

BRETT

32:31 So I put that on my calendar. I can send you just a follow up email so, you know, what's going on. So you have it in writing. Is there anything else? Any other questions I can answer for you in the meantime?

ROB

32:45 No, yeah, I'm pretty good for now.

BRETT

32:50 Okay. Yeah. So I'll put in notes. I'll send you an email later this afternoon, just everything we talked about today, and then I'll call you on the tenth. We'll see where we're at. We want to jump in. Great. If you need more time, we'll give you more time. Yeah. Sounds good. Awesome. Brett. I appreciate your time today. Thanks for joining.

ROB

33:07 No problem. Thank you.

BRETT

33:08 Yeah, take care you.

The End