

# ServiceTrade Demo with Cook Mechanical Inc

Pat Osbahr with Cook Mechanical Inc Recorded on 10/21/22 via Zoom, 1 hour 20 min.

# **Participants**

**SERVICETRADE** 

Pat Osbahr Territory Manager

Gino LaManna SDR

**COOK MECHANICAL INC** 

Jody Vowell
Director of Service

# **Topics**

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# **Transcript**

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#### **PAT**

<sub>0:02</sub> All right. There we go. So, let me ask you this. It sounds like... you guys are already in the process of trying to find a tool, right? This isn't the first meeting you guys have had so far?

#### **JODY**

o:15 Yeah, we can then just some high level stuff that we've kind of audited things that ourselves and some video... product marketing stuff online. But, yeah.

**PAT** 

0:32 Is this your Jody? What is your title there? I apologize.

**JODY** 

0:35 President.

**PAT** 

o:36 Okay, perfect. So, did you take over? I was looking at the website here is a... guy that had the, I guess the family name with the company. Is he still with the organization?

**JODY** 

<sub>0:50</sub> Yes, that's Nick Cook. Yeah. Okay. And the majority shareholder, alright, and he's still involved in the business... of our primary business developer both.

**PAT** 

1:08 Okay. And is this that they put here that you were recently promoted? Is that right?

**JODY** 

1:13 That's correct? Yeah.

**PAT** 

1:14 Congratulations, man. That's awesome.

1:16 Thank you.

**PAT** 

1:17 Yeah. So... you guys have Computerease right now, right?

**JODY** 

1:24 We do Computerease... accounting software. We use it on the Construction side. Okay. Yeah, of course.

**PAT** 

1:34 Okay. But you guys don't like FieldEase or used it before in the past, it was too cumbersome and do glitchy.

**JODY** 

1:42 Not not a big thing now.

**PAT** 

I hear you. I don't think too many people are less, they've like devoted so much money to it. They can't really get out of it, right? So, I hear a lot of people that have Computerease don't actually bring in the FieldEase side to that.

**JODY** 

1:58 Like it for Construction... module as well?

**PAT** 

2:05 I think that's what it's primarily built for, and then some people just utilize it for the service side since they're already got it. Yeah, they made the investment. They might as well try to figure out a way to utilize it for both ends. Is your goal with new software to have it integrate with Computerease or are you going to keep them separate and just export information? Do you have an idea of what you're thinking there?

**JODY** 

2:26 Well, right now, we have computers.

**JODY** 

<sup>2:35</sup> There's some set up a word for it because in addition to setting up a work order, you also set individual for tickets or the labor that's hitting the work order in the technicians name. Well, not only do we have to set up a work order individually but then on, but when we do pick up on Monday, we have to... work or hadn't been created, we create the work order, and we also have to do with creating a work ticket shift, but they won't have time to do it Scott keep our servers magnet. You're tied up roll, stinking Monday and part of the morning Tuesday, all this documentation proactively entered so that we can process payroll through it. And I don't know that service trade tool for this maybe barking up the wrong tree, I don't know, but I'm

looking for an easier way to capture costs at the work order level because right now, you know, if I wanted to pull a report that says, hey here's, all the work orders that are open that haven't been build yet. And I can't do that and I can't drill down into each work order unless I know the work order. But even if I did open the work order up in computer, I can't see how much cost has been applying to it at any given moment. And I can't see calls versus... quote or, you know, look to see what kind of profitability we're at gross margin wise or any work. Yeah, it's like we're flying blind and keeping me up at night.

#### **PAT**

4:28 I understand that. Yeah. So we can do a lot of those things for you guys... and we're built for the service, that history as well. So this is the main focus to use us on the service side and not the camp, the Construction side.

# **JODY**

4:42 Correct.

#### **PAT**

4:43 Okay. Good deal that we do have a project manager management module that is relatively new to service trade that could work for those long, you know, 10 15 week projects that you guys have. If that's interest beyond this, I can bring in one of our because I'm relatively new on being trained on that. So we have somebody that actually could perform that demo and give you more on the project management side, but we'll focus heavily on the service side today. What that looks like, how that works? Let me ask you this since you guys are doing a 24 hour service, who did she, do you guys have a 24 seven dispatcher onsite or?

#### **JODY**

<sup>5:21</sup> Yeah. We have a call set up with, okay third party that provide... not only our customers but for us. We're not here. They pick up the phone and it's just see, you know, the customer feels like mechanical.

# **JODY**

5:43 Working overtime and then we'll go into an on call technician. Okay. I'll call... around four. Okay. So we have an on call supervise walking and we have an on call technician gotcha. And then schedule it on the rotation. They'll actually. And it's basically, it's our phones. It's 48 hours. And so then the call center picks it up and build this search personnel or if they call the on call technician and they don't answer within 10 minutes, second, call it to the on call soon. Okay?

#### **PAT**

6:27 So we will, that flow won't need to be changed at all. That will stay the same for the 24 hour, 24 seven service. We're just looking for the day to day management of the service work, following and tracking all that work and making sure that you guys are able to see your gross margins and kind of have all the information in one place to view it, right?

6:46 Yeah. Yeah. Well, we like that after hours, things were going well, so far. Not really been tested. Yeah. Yeah. Don't have a lot of customers right now. That's... okay. It's going into the next two weeks. We feel like we'll probably get a lot more cold traffic, but if we did sort of business, we obviously need to think about how we do that after hours as well. But, yeah, yeah.

#### **PAT**

7:18 And the reason I was asking that, you know, a lot of the companies that we work with our don't have the call center setup like that. So typically they haven't coming through and then like their technicians need to have the ability to schedule themselves those kinds of figuring out how I would show you how they can do that. But then on the other side, the token, another question is, you know, if you'd want to have them to have the ability to see like the dispatch board of who's working at that point in time, being able to schedule that. I don't know what that looks like from a user account setup, if they need to have, if there could just be implemented as a user account, or if that's something extra so that we can talk about that beyond this. But I'm sure that's something that can be.

# **JODY**

perations is our version of a dispatch board at the moment. And every day we create assignment technician... lobby hours on schedule, not actual. So we're... hours but the actual hours we ever get corrected on the dispatch board... right? And so we've got a different color breach technician. We've only got six tickets at the moment. So relatively small group like we feel like we're probably going to be double that going in. And if we play okay, right? At least two or three more leads going okay, let me see.

#### PAT

9:04 Alright. And then in regards to that, you know, we're really good to scale with. So typically, like if you guys were to sign on for, you know, six technicians today, and next week, next month, next quarter, you found that you were at nine technicians, you could just let our account management team know and they can go in and add all their credentials and everything and get them set up. And it would just be prorated that cost at the end of the contract. So typically how we do it. So you can, you know, we have tech companies that are working with 300 technicians, and then we're all the way down to companies that have two technicians, right? And they're just trying to manage the day to day stuff.

**JODY** 

9:38 Right on being definitely not 300.

**PAT** 

9:42 Big.

**JODY** 

9:44 No, probably two years from now, we're going to be 20 truck. Okay?

9:55 Cool. That's a great vision. Let me ask you this. So if you guys like what you see today, Jody, are you the final decision maker or do you need to take this up the ladder to knit?
JODY
10:12 I haven't made a decision about field, but I'm okay with not only that, but okay.
JODY
10:30 Chris and our VP. Got it. Yeah, I don't think this is, I work with the cool thing. Also. I'm not always right? I want to get folks that are older than, you know. So, yeah, I would, it would be that it lets you say?
PAT
10:54 Okay. And I apologize your service managers name here, what, what's his name?
JODY
10:59 <b>Yeah.</b>
PAT
11:04 It's okay. Gotcha. Sorry, it's breaking up a little bit.
JODY
11:08 This is.
PAT
11:09 Me too, Keith. I'm Patrick man.
JODY
Patrick guys, is that a presentation that?
PAT
Yeah presentation guy. Yeah. Do you guys have a time line that you're looking to like? Is there? And I like, do you guys want to have something in place by the new year? You have a goal for when you guys want to have some better software

**JODY** 

employees?

Well, so couple of things that are driving this forward, what is better visibility to work more cost... efficient? Manage your work orders with the technicians hopefully coming in every day. And then when she... sit here and think he's awesome. There, we should only be me and probably more. So every couple of weeks... you actually have a meeting that we're meeting once a week, turnaround service tickets in paper tickets.

Hi, Jody. I apologize for stop and you can you lean into the, to the camera a little bit more to the, so what did you said there was that obviously something to track work order, cost, right? And tracking like parts and labor and everything and how associates the second piece that I got from you was you need a more efficient way to manage work orders. And then you said something about how like the time are you guys doing this once a week? You said you'd rather do it once a month and have these conversations.

#### **JODY**

12:44 We're we're the technicians every week, every Monday.

# **JODY**

12:54 We're we're back to the cost room... table... once a week that's on billable time. We shouldn't do that, right? We should be a master report normally as far more operationally should only have to do that once a month and talk about safety, you know, vehicle safety or work order proficiency or, you know, whatever I mean? But every week... six, at least six hours... and hours... parking lot of planning billable time... that's a costs that isn't necessarily the right technology in place. Yeah, And the other driver for me, we now we, you know, preventative maintenance for us, CornerStone of growing the service. We're trying to grow the business by applying more preventative maintenance cost for the preventive maintenance provider. Then we have that's a feature, right? Where we have not really see anything that goes wrong basically almost four. Yeah. And that's you know, that's a great position. The problem is we don't have a good customer experience that we're providing. Other than that, we've got some good technicians, right? Very likeable guys, but we don't but the work product, right? Which is as, you know, services very tangible. There's a lot that happens behind the scenes that the customer doesn't see. And we don't do a good job of making it all because the stuff that we're turning into them, the work product returning sucks. It's like inherit if it's even all and information sometimes missing. When we do give them a copy, gets three, right? And we're a small operation. So, you know, we had always run this thing for the last week. Sometimes he's out in the field. Richard is right. And so it's been very hard. We haven't had a full time and dispatch presence in the office. And so we want to take it to that next level where we provide a good customer experience. So when preventative maintenance forums that we did in the field looks good logo on it, script all the shifts there, you know, and that's part of the thing that... I wanted to go over with, you know, go back and find out... you know, the last time they receive, you know, all the different information we're not calling me to other.

# **JODY**

Yeah, we really need some help or not. Profession. Hello? Hi, this is Mike forest. Yeah. So, and also track garbage in garbage out, but track for each truck, all the equipment for that customer. Okay? Through rate we are all. And then after that, we can actually track call backs by piece of equipment, you know, and have some kind of history... so that when our customers and I noticed you guys build me again... I don't know, let me pull that report by our queue. Three will send you that information. Yeah, we have to go through and you go in and search for all we want that. Yeah. And it's...

17:03 How are you tracking that today right now? How are you guys tracking assets? Somehow? Is it just all on paper?

#### **JODY**

17:10 Okay. Yeah, we save it in the folder at the time. That kind of gets lost. So, please.

# **PAT**

<sup>17:21</sup> Yeah. So, and I guess with the way you guys have it right now, there's no way to, if it's not in the computer or anything like that, you guys aren't able to put all that into like an excel file already have what you have today? Okay?

**JODY** 

17:34 I mean.

**PAT** 

17:35 We can update that, but it would need to be in an excel file to begin with.

# **JODY**

<sup>17:39</sup> That's per call and ask for something like that. Yeah, it would take and that's why it doesn't get, you know.

#### **PAT**

17:50 Well, hey, alright. So let me alright. So just that's a lot of great information.

--- *Pricing* ---

# **PAT**

<sup>17:53</sup> But just let me ask you again just so I can put this down in my notes just timeline. Do you have a timeline in, and I, it like with an idea right now?

**JODY** 

18:02 Q, one of next year?

# **PAT**

18:05 Yeah, perfect. And the reason I asked that especially with where we're at right now, typically Q4 because of the nature of the business, right? With the getting colder and things slowing down a little bit in this point in time, this is typically when we actually see a lot of customers on board. So we have, the way we do our onboarding as well just to talk to you a bit about customer service from our end is we have small onboarding windows so that we're making sure we're setting up our customers with success so that our implementation team actually can provide the level of detail they need to the customers when they're getting setup and getting running so that you guys have so much information that's being brought on. So the way we do it as is a two week window every two weeks, we have a certain amount of customers that we onboard. And typically for, you know, a customer of your size, it's

gonna take about 60 days to do the onboarding. So say that we know everything looks good. We'd be looking at, you know, the first, I think implementation date is the fifteenth of November. So with that and I, with it, would that in mind, you guys would be up and running by January fifteenth or so so just to set that, the time table there, and then beyond that, do you guys have any sort of budget in mind right now that you're thinking of?

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19:23 You know... we'd like you to pay us to be.

**PAT** 

19:32 You broke up a little bit there, Jody? I heard us pay you guys?

**JODY** 

19:38 Yeah, I know we... were looking at but.

**PAT** 

19:47 Say again?

**JODY** 

19:48 We want you to provide, but we don't really have an idea of what this is gonna cost?

--- Pricing ends ---

# **PAT**

<sup>19:53</sup> Perfect. I gotcha. No worries. And then beyond that, or are you guys, do you know, put it in here that you guys were looking at BuildOps? Is there any other tools that you guys are currently looking at?

**JODY** 

20:05 Well, we're talking to operations specialist. Okay. Who lives?

**JODY** 

<sup>20:16</sup> With that, and I understand that BuildOps guys are ServiceTitan, equal all that part of it from scratch to make them more commercial Progress. Yeah, ServiceTitan replay developer more, does it get some news... reporting to our... service?

**JODY** 

20:43 Good strides for the three that we're looking at the person's brain service time.

**PAT** 

JODY

20:53 And you guys are the first to the?

**JODY** 

<sup>20:59</sup> Show in vegas? Biggest... yeah, for some of your folks over there about service trade. Yes. And... it's...

**PAT** 

21:25 You're still going in a little bit out, Jody? I'm sorry, man.

**JODY** 

21:28 Sorry, I... just saw your.

**PAT** 

21:36 Okay.

**JODY** 

21:37 I became aware of the product.

PAT

21:41 Perfect.

**PAT** 

21:45 Cool.

PAT

21:50 Yeah, I think with, especially with what you guys are looking for and I'll show you more about it right here, but I think we could be a really good fit for what you guys are looking for. I know ServiceTitan is a good product. They are a little bit. And from what you guys are doing, right in the notes here, it looks like you guys are 100 percent commercial. So you're not doing any residential work. And if you, or maybe it's just one offer people, you know, or something like that, right? So there are built more for the residential side and growing the commercial side for sure. I'm like a 1,000 percent positive that we can beat their price as well. But, you know, what's important about what service trade does is we were built for the service industry. We weren't trying to navigate both sides of that fence to be a service to service tool and a residential tool. We came with the commercial contractor in mind and that's how we build our tool for. So let me do this if cause I know we only got 30 minutes left. Let me just go ahead and hop in here and I'll kind of walk you through a job today and give you a look of what service trade looks like. So let me do this. And before I do that there, you know, I usually have this slide show that I do here right? Scott some slides. I wanna talk a little about service trade. These are some of the bigger customers that we have there today. But in a nutshell, you know, what this is again built for the service contractor at heart. We were organized in 2012 last two years. I'm sure you guys have seen that there's been an increase in the mechanical industry.

And, you know, two things that go along with that, right? Is that there's more competition and most of them are utilizing technology and leveraging the technology to make themselves more efficient. So that's how you can, then I'm sure you guys know that's how you can stay competitive there in the market is by better technology and be more efficient out there for your customers in the field. One of the main ways that we're trying to help you guys drive revenue here. And what you're gonna see here on the PM side is when you have those contracts in place and you're doing those routine PMS, we have what we call the deficiency loop and that's helping you guys to find repair opportunities out there in the field, get that notated quickly, get that, you know, sent to the office, get that quote and send that to the customer as fast as possible. So if you're still on site, you can do that work and get more billable work done without having to, you know, sign more jobs and have you guys driving around. So that's one of the most important things than the other pieces, obviously trying to help you guys attract, you know, better customers, those that appreciate the value of the work that you guys bring over the cost of the work and those that are gonna, you know, pay you guys on time as well. So, which is extremely important. But... let me just do this real fast. Let me hop into here and I'll show you this before I actually show you what the job looks like. You were talking about being able to track upcoming work and work that hasn't been, or work that maybe I've been completed and hasn't been build yet. So a couple of things here. This is your dashboard, right? Keith, this is where you and Jody, you're probably gonna live especially when you come in the mornings, you're gonna want to see what's going on. So, you know, not a whole lot of jobs booked out today. But this is what we'd be looking at on our board for today. This job is the check mark or they're showing that this jobs already completed there... below that, these are overdue jobs, thought appointments. So these might be a self service work that we just haven't gotten around to yet, but it's on the board that we need to do. So keeping us up and up to date with all that info with all that work that's on the, that we need to complete jobs without appointments for the next two weeks. This is where your PMS are gonna live, right? So here, you can set things and forget it. So if you have quarterly PM jobs here, you can leave it, you can go ahead and set them up by the customer. And then when they come into being two weeks out, you can see all that information right here and schedule it directly from here. Now, these are past jobs have been yet mark complete by the office. So these are things that should be completed that our office staff has not gone in and completed and invoiced out. So this is just keeping us on top of the stuff that we need to do... from an accountability standpoint in the office. And then these are all those jobs here that you guys have completed that haven't been invoiced. So this are gonna keep you on top of track me down revenue for the...

# **JODY**

26:18 So, so what are the top there? The other jobs that are pending that may or may not be completely, I need a more complete?

**PAT** 

26:30 Yeah. So.

**JODY** 

26:32 Actually compete but not Bill.

<sup>26:34</sup> Not Bill. Yeah. So like here, so here, right? Your office staff would just come in... click on this job... you know, click on the job that it was though it's probably the reasons probably not completed because it's done scheduled, right? So maybe they'd come in and schedule it or they'd come in and see that, hey, it's been scheduled and it's been completed, but they just need to actually come in... and complete the job. So that's what that is and then... get back out of this.

**JODY** 

27:13 Whereas, my...

**PAT** 

<sup>27:16</sup> And then, yeah, the ones below that are jobs that have been completed, but your office staff hasn't gone through and actually filled out the invoice and send it to the client. So if my internet wants to work with me today, this always happens when I'm on Zoom too.

**PAT** 

<sup>27:35</sup> So, you know, obviously the idea there is to keep all that information relatively available for you so you can follow through the workflow and make sure everything's getting out properly. So here, right? Like JFK mechanical center, Maine. Wait that's wrong. I gotta click the actual. If you click the job number, it'll take you directly into the job, which is what I'm doing it correctly.

**PAT** 

28:00 So if you click here on the job number... it'll take you directly into the job. And then all you need to do is send your invoice link from here.

**PAT** 

<sup>28:15</sup> And then over here, on the left side or the right side is all your clock in and clock out events. So we're able to actually, sorry.

**JODY** 

28:24 Boy.

**PAT** 

28:26 When it pops up here, what we're able to do is, so we have a couple of different clock in and clock out. The first one is in route. So when they clock in route, it'll actually send an email to the client on that's your primary contact, and it'll say, hey Patrick, you know, 25 minutes away. And then it'll give you a GPS timestamp as well where they're at when they clock into these. And you can see when they clock in a jobs when they clock out a jobs. And some dispatchers use this to know, you know, when they can release the next job, so that technician. And then there's also a dispatch board which I'll show you later. They can utilize for that as well. And then, you know, obviously here to, we can see by the GPS points where our technicians are located at any given time, when they're clocking in and clocking out.

29:22 No. **JODY** 29:23 No. **PAT** 29:24 No, it'll pull the GPS point directly from whatever the times whenever they actually clock into their phone. So wherever they're at one o'clock in their. JODY 29:31 From a phone or a tablet, okay? Yeah. **PAT** 29:34 Yeah. Yeah. And they can in, obviously, they can download this on android or iPhone. So if you guys have those out there in the field, they'll be good to go or if you provide Tableau? **JODY** 29:44 Well, they can use... that GPS... incorporated into the. Yeah. Right. Yeah. So we don't need, we don't need to have a third party application in order to get the customer email that says, hey, John just popped 30. That would be. **PAT** 30:09 All all you gotta have is the emails, the email from the customer, you know, as like whenever here, I'll show you this. So whenever I come in, I've already made you the primary contact. So all we need here is the information for the primary customer, and it'll send that email to them whenever they clock in. Now, we do have it's an extra piece, but it's we have truck tracking. So if you actually want to know where your trucks are at any point in time, we have a third party that we... work with a partner that can do that. But that's something I honestly, I don't think you would need that. Yeah. JODY 30:44 No, I think we, I like just as long as they have the app on the phone. Yeah. Yeah, that's fine. I mean, I'd rather not incredibly expensive.

**PAT** 

29:16 And also this, we have to integrate with the GP.

30:55 Most definitely. And it's very simple to do so. Your guys, if the, if they're not doing it, right, it's like come on, it's all you gotta do is it's right there in front of you, just click it and what are your clocked in? And then it'll once they clock in, I'll show you this in a second. Let me go through this and I'll show you actually how it works. But here, so we like to have everything set up with Bill to ship to, right? So say that

**PAT** 

you have an organization like the PJ super store that has multiple locations. So it'll be set up under the primary location with all the places that we service, you know, tied into the same same page here. So you can see everything going on at each location just by clicking on it. So today, I've actually set us up at the Myrtle beach location, I believe. And then here under the Myrtle beach location, right? We can see all the services that we have with this particular client, this location, we can see... yeah.

**PAT** 

 $_{31:56}$  And these are built with service templates too. So if you guys have recurring services like this, when you guys want to add a new service, we can use utilize these templates.

**JODY** 

32:05 What is it? What is the red meat, that calendar icon there?

**PAT** 

32:12 I believe that this is just pass do.

**JODY** 

32:14 Okay.

# **PAT**

Really Seah, that's what that saying is that we have this recurring service that were, you know, well over a month past due on. So we need to either call this client and tell them that we're very sorry, where you get the scheduled out as quickly as possible. And you'll see whenever I log into my application here, that I have a lot of unscheduled lot of schedule jobs I haven't completed. And that was just whenever I was getting used to learning how to utilize the tool, I did a bunch of jobs that I didn't complete. So you got your team won't see this is just, this is actually a good question that you asked that because that's exactly what that is just telling us that we missed the terribly bad. But back to the services. Whenever you, if you guys have a recurring service like an it quarterly H back, we can help build the service templates out so that it will pull this information directly in with your verbiage, your call, estimated costs, estimated hours. And then you can also put, say that you have like a specific technician that you want to do these. You know, you can put me in there and I can do all the H fac services. If that's how you wanted to set it up. Go ahead.

JODY

33:30 To...

**JODY** 

33:36 Your 10 additional performance with your tool.

33:41 That's a good question. And would you want them to see that or would that just be for internally for yourself?

**JODY** 

33:51 Either way, I wouldn't care of... one another. Maybe I feel like.

**JODY** 

34:01 Perfect competitions. Good.

**PAT** 

Yeah, I don't believe that there's that possibility. But what we can do... is let's see there. It is text scorecard. We do have the text scorecard. I know we can break this down by individual technician, but you can see how much time they're spending on jobs per week or per month or within an individual, we're in a specific timeframe and then you can see how much money they're generating, how many appointments, if they've been late, if they missed any appointments. So this is what we call the text scorecard. Obviously, it doesn't rank your technicians, but it just gives you an idea of how they're performing across the board.

**JODY** 

34:48 Yeah, yeah.

**PAT** 

34:50 Along with this, I do know, I'm not sure how we do it. I saw somebody do it recently, but you can actually pull out an individual technician and look at just their variables by themselves. So there is a way to run that report to just look at one specific technician. So from here, I'll pop into... and then again here, like we're going to be able to see all the assets on this site. We can see all the previous jobs that we've completed here, can see all the quotes that have gone out. So talking about, you know, if they had a question about a previous quote or something that was worked on, all that's gonna live right here for you. And the cool thing is that whenever we're building deficiency reports or we'll have, we have a repair opportunity and we, you know, take a picture. That information is pulled into a job item, and then into an invoice, all that information flows from the field to the office to the customer. So when you pull up this quote, it'll have the picture and whatever comments or anything attached to that the technician found out there.

**JODY** 

35:52 And you can... within the software or create?

**PAT** 

36:03 Right. Did you ask if you have to import the quote in or if you can build the quote in the south?

**JODY** 

36:08 Yeah, you could, we want you to build it in the software actually to make it easier on you guys. So, so I'll show you that right here. Let me do this today. I'm gonna go ahead and add a job for you guys. So we're going to say that, you know, somebody called or we're just let's just set up a preventive maintenance. The, since that's something that's top of mind for you guys, right? So we're going to do it service this month, job type. We're gonna do preventive maintenance. And then we can upload any contracts that you guys have. These are just the basic demo, read contracts here. But then you could just click whatever type of contract you wanted to utilize. And then we'll come down here and click the preventive maintenance quarterly... and I'll assign it to myself. We'll schedule a job for today. What time is it? 10 40? Let's do at 11. So create job. So that's how quickly we were able too great that work for Patrick from the company view. So this is what healthy that obviously he has to go check to prevent that has to do a preventive maintenance job on this roof LG unit this afternoon. And then it's pulling all the information related to that roof unit here. And then you can see the estimated price when we go to build the invoice. Jody to what you were saying will actually give you the gross margins here in the top right corner. So I'll show you that here in a little while. But... here are those clock in events. So when I clock in route, let me go ahead and do this for you. Actually I'll show it to you here. In a quick second, one actually pop in there. They don't have the acid information obviously. And this is our work order, right? This is what we're going to be surfacing here today. So from here, let me pop into the service trade at, give me one second and show you what it looks like from a mobile form.

# **PAT**

38:15 Let me know when you guys see my cell phone. Alright, very cool. So when you guys log in, this is how they're gonna see their daily work here. This is what I was saying. That I have all these scheduled jobs. I have a completed. These are what I was, this is what I was talking about. But they should only see the ones that they have scheduled for that day. When they're looking from this page. Now, if you have a particular technician that I was talking about, who might be your H back guy or somebody who primarily works on chillers, boilers, or some sort of... skilled trade, we can set up, you know, jobs out in advance for him so they can actually see their unscheduled jobs. If they have something coming up that they know is a big job or something they need to definitely get to. They can like look at this, see it and be like, hey, can we go ahead and schedule this out for maybe next Thursday? When I have a lot of time, if you guys allow them have that... the ability to do that. And then they also can see their completed work here as well. So if they need to go back and add, go ahead.

# **JODY**

39:19 And they completely great using there. Yeah, everything.

**PAT** 

39:25 Yeah. Let me read asset one more time. Can they?

**JODY** 

39:32 Yeah. Can you guys see that their phones or?

**JODY** 

39:40 Or do they need an iPad or something else?

#### **PAT**

<sup>39:44</sup> Great question. No, they can use their phones. They can do all this on there. And I even the other day I haven't logged out. Now, one guy was asking me specifically, like if you could have this technician set up... calls, if they were to get calls and they were doing things differently like with teams messaging where like the customer would teams them and they would get the problem and then they could actually go in and build it. But I was trying to figure out if they could log into the actual application, the web application on their phone and they can do that as well. So if you gave them permissions like a lead technician, he could actually log in on his phone here and go into the office view and schedule things out if need be. But he can't do it from this view.

# **JODY**

40:29 So explained to me... what are some of the issues that people are seeing related connectivity problems using the?

JODY

40:51 New record, all connected?

# **PAT**

<sup>40:54</sup> So related to connectivity, I think the only problem that we have is like if you're in a dead spot, and I think this is the problem that anybody would have unless they have, you know, like VPN networks or whatever in the trucks. But so, if they're in a dead spot, it's not going to upload directly and the information is not going to move immediately to the office, right?

# **JODY**

41:18 What most of the story, lip... service area? Okay?

# **PAT**

41:24 Yeah, that's the way it works so they can continue to work on the work orders and implement information. This will work. It just won't upload to the office in real time if they're in a dead spot, but say that they're you know, right out of it that right out of the service done the moment that they cross into having data, it'll upload to our tool. So I think that's the only real issue that we have is I would even I wouldn't even call it an issue. It's just dependent on where you're located in the service areas that you have. I can imagine out there in Texas, there's some very rule or areas and one guy that I still if he was working on all rigs out in west Texas though that was something that he asked as well. It's extremely and pair it. But I think what we do, you know, is that the moment they get into self service area, that stuff will upload to the office, can see the information and get working on it gives you the customer as fast as possible. From here. Let me hop into the job for today. So this is what your technician is gonna look at when they hop on site. Now here's the clock in events down here at the bottom, they have three different types of clock in events. I'll start with job prep because that one's not nearly as important. But this is just there. So that say they're on site and they don't have a part or they need to do something

associated with a job. But it's not actually related to working on the job. They can add that in here as like an additional clock in time to set that information aside. In route is when they're and they're saying, hey, we're on our way to job site and they just want to let the customer know that they're on the way. So then when I come back to the office, I'll show you how this upload via GPS. But when I clock out here, this will ask them if they want to go ahead and clock in directly on site, which they should be, since when they clock out, they should be theoretically on site, right? So they're good hit. Okay. And o'clock us directly into our work on site. From here, they can see the services that were performing today. They can see, you know, job items. They could see the assets. And I'll stop here for quick second because this will be important especially with the way you guys have assets setup, so you want to track the assets, right? And you want to have that information live say that you're coming on site and we know the particular assets that we're working on today, but we know that there's three or four more assets that we have there. Maybe the first time you send the guys out there for the next job, you want them to add a couple of assets into the system. So we already have it readily available. They can do that just by, you know, down here at the bottom hitting add asset selecting type. And then, yeah, just adding it in here as H back... and then just putting in the information based off of how it correlates directly with that asset there. So they can do that pretty quickly on their end as well. And this is also good for, you know, say you have a customer that... likes to ask you do extra work when you're on site, right? So you can, if they ask you, hey, can you can take a look at this? Your technician can add that asset in as well if that's something they want you to keep up to date on.

# **JODY**

<sup>44:52</sup> Do we have the ability to... have while we're there without work more into another work order if they want to keep the billing separately, different assets or four PM... and, but they ask us to fix something that's outside of the scope of the view?

PAT
45:16 Yeah.

JODY
45:18 Or they find something that's broken... and?

PAT
45:27 It just built separately?

JODY

45:29 Yeah.

**PAT** 

That's a great question. I'm not positive about that. I, it could be that they would just have to call the office and say, hey, I have something else here. They want me to work on. Can you send another ticket up for this? But I'm not, I'm honestly, not positive. That's a very good question. Let me write that down for you... and I will get back to you on that. I don't believe so because the, in the application here, they

cannot set up another work order. It has to be generated from the office and given to the technician.
JODY
46:05 Yeah, yeah.
PAT
46:09 Let me just, I'll definitely clarify for.
JODY
<sup>46:11</sup> Hello. Hey, you got it under their name. They'll be able to clock out of that when you go to the other one that's on that first.
PAT
46:23 I'm sorry, say one more time you broke up?
JODY
46:25 Yeah. So, like if they want the office to create
JODY
46:32 All your work orders, yeah. Yeah.
PAT
They would, they, all they would do is just need to refresh the page and if they put it in a new work order, it would be right below that. So they could see the new job number. Yeah, that's as easy as it is. But that's a very good question. I think I want to know that too. So let me write this down.
JODY
46:59 We won't get another 10 minutes or so.
PAT
47:02 Okay.
JODY
$_{\rm 47:03}$ Probably, I need another demo with you. But before we sign off here, Pat, I have one question on the quotes.
JODY
47:19 Separate tag is offsite customer wants to quote.

47:26 Real quick. So... the call your office, you can give it a formalized and whatnot... but that... the tool... offers... you a little bit of a way a couple of hours ago, surprise?

# **PAT**

<sup>47:50</sup> Yeah. So they actually can generate an invoice onsite. So they would just come in and pick the contract. They could add, you know, add what detail they want to give to that customer. And then they can come down and put the invoice items indirectly. So.

#### **JODY**

48:08 Like... we would have to develop the schedule. This, I guess this is the pricing, right?

#### **PAT**

48:18 Yeah. Well, I mean, so if you go ahead and put the specific information in there, like... let's see, let's do a... like if they're just doing it for like an H back compressor... and let's see if this pulls them.

#### **PAT**

48:44 It's not. Yeah. So I guess you would have to have, I thought it would pull the price indirectly if it's associated with the service line, but I guess that they would have to have a pricing sheet out there in the field to know exactly what the quote for that particular service. Yeah. But there is the ability for them to do to turn this over to the customer and say, hey, this is what you're looking at?

#### **JODY**

<sup>49:06</sup> We would have to actually show them... or if it was just some basic, yeah... yeah, we can estimate the man hours... for a certain contact or is it... but, you know, pricing are very, yeah, product feature... yeah.

#### **PAT**

<sup>49:33</sup> Do you guys mind if I show you the deficiency loop real fast? All right. So say that we've come to this H back unit, and then we found that there's a problem here and this will flow into invoice in Quickbooks. So I want to show you both sides of this real fast. So just adding a quick deficiencies, we're gonna use a compressor as the use case today. So broken compressor. So they just need to add a small description. And then we want you guys to add multimedia. So, are you guys utilizing pictures of some sort today?

**JODY** 

50:08 We like to hear.

**PAT** 

50:09 Gotcha. Perfect. Yeah. So we wanna make.

50:12 We like them to be, and it is with all this horrible thing. Let's circle with a week is that I put an hour.

#### **PAT**

50:23 So they can add, you know, information down here below custom comments if they'd like to. And then we wanted to just go ahead and attach that. And again, they can add, you know, videos, voice memos, and this is all toggle later. So if you want a video internally but don't want us to that to the client, you could turn that off. From here. We'll just notate it as an operable and then will notate it back to that asset that we're working on, which is an H back unit. And then we'll notated as new. So one of two things will happen. It'll be new notated as a new deficiency within our office application. But also our office team will get a notification saying, hey, Patrick found this deficiency. We need to get this quoted out for the clients, see if we can get this approved while he's on site. So... replace... compressor. Alright. So there's our new deficiency. And then when I come back insight, we're in on the, in the office... your office staff will get an notification telling them that... come on. Well, they'll get a notification there. It is right there. Boom that, hey, there's an offer, full deficiency here on that H back units, PJ super store and a lead them in the right direction to open that up. And I'll bring them into the deficiency details. So talking about quoting within... service trade here, pulls all this information and for the quote, Scott, the attachment of that picture as well. And then we give you guys the ability right here to generate that quote.

**JODY** 

52:15 Hello?

#### **PAT**

52:16 So from here, all we need to do is make sure that this information is correct with the asset, what contract we wanna utilize? Obviously, it's a repair and then we can go ahead and generate that quote from here. So like for clicks, right? And we can go ahead and generate that for you guys. And I'll go ahead and shoot this over to you. So you could see what our quote looks like Jody.

**JODY** 

52:38 Okay.

# **PAT**

52:40 So you'll have this on your end. And then, so once you send that email out as well, they're gonna get an email that looks just like this, right? It's gonna have your custom branding on it. It's going to have the location that we're servicing our office is going to have the technicians information, and then it's going to have the picture of that broken compressor that we found. And then they're going to have the ability to go ahead and approve that thing which is obviously want them to as quickly as possible or request changes or tell us like, hey, what happened here? What's the issue? How quickly can we get this done? And this will come to the office as an email again, that will help limit the amount of calls going back and forth. So once they approve this, let me go ahead and do this in the office. Another piece that's really cool here is that you guys will be able to see the history of that quote. So you could see whenever Patrick generated that picture, whenever the draft, those made when it was viewed by the customer, when it was approved. And then once you do that, we

want you guys to be able to add that to whatever work is. You know, if the quite have the technician still on site, we can add to an existing job or if we need to create a job like next week to come back and fix it, we can do that directly from here. But since we already have Patrick on site, we'll just go ahead and add that to that work... in copy all the information trying to do this quickly. So you guys can see it all real fast. And then... from here, you know, all Patrick needs to do out in the field is do the work... and complete his work out there. So as you see here, now once I update this... let's added it to the wrong job. I must have added in the wrong job, but all those items will generate here for the compressor replacement. Maybe it's just the internet this morning, but yeah, they would all you would see 11 items that will pop up here. So it'll be all the information related to the compressor replacement there as well. So then once Patrick finishes that... he can come in. And if you guys are getting signatures on site, you can create what we call a work acknowledgement where he can turn this over to the contract. They can check out what the, what all has been done and they can go ahead and sign that they acknowledge that the work was completed. So if that's something you guys are doing on site, we have that ability. And then all this information will flow directly back. Into the office.

## **PAT**

<sup>55:42</sup> Hopefully it flows back in here because... I'm not sure if I got confused by the yep. And then, so there's our work acknowledgement now associated with the work that we completed out there in the field. So, now that Patrick has... finished his job and he's clocked out.

**PAT** 

56:06 You can see here.

#### **PAT**

The clock events. So this is what I was saying about the GPS points of where they're at when they're clocking in. So obviously, that has the escalation mark because I'm 156 Miles away. But since we've seen that Patrick has completed the work here today, this is what I was talking about. Jobs that need to be completed in the office. You just come here and hit complete job, pulls all the information directly in and we can create an invoice directly from here. So it'll pull all that information indirectly related to the broker compressor and the service.

**PAT** 

56:56 And I realize what I did wrong here.

# **PAT**

<sup>57:04</sup> We have the service agreements, not service agreements, service templates that we utilize. It's a little too late to show that because I know you guys gotta go, but basically like something like a broken compressor or an air pop or something of that nature that you guys are fixing a large portion of the time, we can actually build out service templates for that. So that information will be readily available each time you go to service one of those jobs and it can pull that information directly in there along with costs.

57:33 Okay.
PAT
57:34 Saved there. You see the gross margin as well.
JODY
<sub>57:37</sub> Pat. So we're running short on time you're currently using? I think we need to demo because I want to have our HR maybe.
Pricing
JODY
57:53 Yeah, I want to talk about how we would integrate this into payroll process. Okay? And I don't have time right now, the one or two questions before you before we leave that one, what does it cost? I understand it's a periodic feed emission, the cost one and two. Are there any implementation fee? And what does that actually look like?
PAT
58:30 <b>Sure.</b>
JODY
$_{58:31}$ I know the implementation from here, you can either go well or she has a bad habit. Yeah. What's involved in the implementation? Maybe?
PAT
58:45 Gotcha. Yeah. Yeah, most definitely. Okay. So it just in, regarding the pricing again, you guys aren't gonna want this to integrate with Computerease, right?
JODY
$_{59:00}$ It depends on redundant work you have to do. We're going to need that session to talk about that part.
PAT
59:11 Okay. So baseline.
JODY
59:18 Without integrating with them, right?

<sup>59:21</sup> Yeah. I'm from the, and I'll just say this from the integration portion with our... third party. It's basically like a push. So it will basically whenever you enter information into service trade, you can set it up where like every 15 minutes, it'll

**PAT** 

push it directly or you guys could do a manual push where you actually have like

another application that you opened up and you push a button and it'll move that information into Computerease. And that's done by AI dynamics is the partner for that. So if you guys decide to do that, you'd be looking at the premium price which would have the support for that custom integration. Now, there is a separate price with them. So that's what it would be on that end if you guys wanted to integrate with Computerease. Now... obviously you don't have to because you can invoice directly out of service trade. So if you decided to just keep it within service trade, you'd look and I think at the select package would be perfect for you guys. So it starts at five technicians which you're already right there at. And this goes to as many technicians as you want on select. So you could have 300 technicians on select. At some point you guys get to that, you know, you have that big of an organization. But... so it would be 89 dollars per technician. So let's see. You guys would be looking roughly at... 64 eight for first year cost... that's actually the renewal costs every year. And then first year cost would be that plus it's 350 per technician for integrate for integration purposes. So you guys would be looking at 2,100 for the integration. So first year... 85 away.

**JODY** 

1:01:19 That's only that's only so much, I know.

**PAT** 

1:01:23 That's on the select package up.

**JODY** 

1:01:27 The integration for the premium?

# **PAT**

1:01:30 Yeah. So the integration for Computerease is 6,000 upfront for the integration and I believe it's 5,500 dollars annually or it's either that or vice versa, right? So it's either 6,000. I'm not completely positive. But I know that it's about 11,500 first year. And then somewhere around 55 to 6,000 for the annual cost for the UI dynamics integration. So I definitely think that's you know, it's important if you guys definitely want to have it integrate with Computerease.

--- Pricing ends ---

# **PAT**

1:02:05 But I feel like with what our tool can accomplish, we can navigate that for you guys without actually having to do that. But that's up to you and how you want to structure it.

#### **PAT**

Regarding integration itself. So an onboarding, if you guys decide to move forward with service trade, we would have you set up with an onboarding manager and then there's weekly calls and then there's some stuff that you guys do on your own in their certifications, the certification program here. So your technicians will be given certifications to learn the back into the tool. And then you guys would be given admin certifications. And again, it's about... six six weeks or so. It's about 60 days.

But one of the things that we're gonna do for you guys to get you up and running as we're going to enter all your technicians, we're going to enter all their information. We're going to enter all your clientele information... as well as services... parts, information like that. But the only thing that we can't do. And unfortunately, you guys don't have the acid information which actually make it easier so you guys can build from the ground up. But if you guys wanted to import acid information, that would be an extra 1,500 dollars.

**JODY** 

1:03:23 A lot of the capture doing... paper.

**PAT** 

1:03:28 So you don't need to really worry about that unless you guys like put that into an excel and one of that would be the only option therefore.

**JODY** 

1:03:39 Does your partner that... helps with the, I agree. Do they have experience with? Yeah, I agree.

**PAT** 

1:03:54 You broke up a little bit. I know you're asking about, yeah, dynamic.

**JODY** 

1:03:57 Yeah, dynamic have Computerease integration experience?

**PAT** 

1:04:02 Yeah, most definitely, they built this through here. Let me find this information real fast. And I think I have it right here. Give me one second. Computer is integration here?

**JODY** 

1:04:15 Yeah. Does he do other services? Like can I put together custom dashboards is?

**PAT** 

That's a good question. I don't know about that to be honest with you. But here for the time being, I'm going to send you the information around the Computerease integration. I don't know a whole lot about your dynamics outside of their Computerease integration because what we specifically use them for. So that's my apologies. But if you look there in the chat, I did send you like there's a quick... video about the connector tool. And then I also work with a lady named Tania, let's Tanya, his last name, but she came from being a controller with a company that utilize Tanya. Any, is her name? So utilize day Computerease tool as a controller working for a service contractor. And we stole her and brought her on here to be our accounting extraordinary style person. So if we need to talk more about that, she would definitely be the person I'll bring in to discuss that with you because she definitely has first hand knowledge and has worked with Computerease a good deal.

JODY 1:05:30 Yeah... right. --- Next Steps ---**JODY** 1:05:43 Alright. **PAT** 1:05:43 Let me do this. So since we want to do, you have... her calendar in front of you by chance? **JODY** 1:05:55 Nope. **PAT** 1:05:56 Okay. Well, what we can do here? **JODY** 1:05:58 Hello. Well... let's...

**JODY** 

1:06:07 Let's let's do next week. Yeah, Kelly... Christmas, you know... because you do these outside of work and... he's an active mom... probably didn't hear... that. Well, we are on the table. Okay? So because Computerease. Okay. Yeah, we want to avoid double entry. So I think some sort of integration. I don't wanna waste.

**JODY** 

1:06:52 So I'd like to understand what that looks like from a payroll standpoint. So that whatever like I like for the guys clock in, clock out to be and all the candidates that we don't have to delete sites for payroll. So that way, you know, we could definitely be able to clock in, clock out on their devices. And... from that point on, you know, a report once a week, but, you know, if we have maybe... that's okay. But we don't want to have to do a separate time keeping exercise.

--- Next Steps ends ---

PAT

1:07:37 Yeah.

**JODY** 

1:07:38 It out in the system that would save a bunch of energy.

1:07:42 It might be beneficial to show you guys our time card piece that it's basically like a clock in clock out tool that directly bills were directly plays in with your billing, but it's basically just the time ledger keeps track of it's. You know, it's like a punch card basically.

# **JODY**

1:08:00 Yeah. Yeah. Yeah. We have the reason why... you know, because of work, when we set up the, when we set up the call, the... work order sheet, work order number should be all costs that go with that workforce. Right later goes today, the material we picked up material, we go back to the work order. We want to keep it. Megan. We don't have to do any extra... no separate time cars. Yeah. So what I need is at the moment... probably ask the question... right now we're spending creating work orders in theory and also creating work tickets every Monday and Tuesday.

**PAT** 

1:08:58 Yeah.

**JODY** 

1:08:58 We got it. Yeah. And that's about... probably at least eight hours a week.

**PAT** 

1:09:08 Yeah, that's crazy.

**JODY** 

1:09:09 Yeah, probably... 10 hours 10 hours a week... that's fine. Yeah. Right. So, yeah, if we can eliminate that and then justify the expense.

**PAT** 

1:09:28 Do you feel like from what I've shown you here today is a good start to seeing how we can eliminate that for you guys?

**JODY** 

1:09:35 It's still a lot of physicians. Okay. We ran through so quickly components.

**JODY** 

1:09:46 Or just on each individual piece, like setting. Yeah, brilliant. You know, going through... what that's why? Okay. Better feel for what the customer sees for calling all the pieces from, yeah, no technical all the way into notifying them or sending them a copy of the completed ticket with it. Sure. Absolutely. Yeah, that, and then also what, you know, from the text point of view, what they see, what their data into it looks like we would really work on site what they have to do. So. Okay.

**PAT** 

1:10:36 So, how about this? Well, let's do another call then, and before we bring in Tanya to talk about the back end, let's kind of solidify how the system works? Like,

you know, everything from an operational standpoint, and then we can do.

# **JODY**

1:10:53 Hello? Hey, how implementation, what does training... typically? How... does that? Is that included in the 2,100? And we're the ones that have the training, those types of questions, right? Good. How can acquire some bad integrations, pretty, it's taking like a project manager... sure calendar.

#### **JODY**

Rather than the person to see, you know, hello, properly. Yeah, I'm not sure what we get... a 1,000 integration but, you know, what's the integration... there's? Also like this... project manager... help make us, this thing create happy customer... happy that, you know?

# **PAT**

1:12:07 Me dig up more about the... more about the information around implementation and see what because I know that it's mainly, it's just guided portals. And then we have the one, the weekly calls with you guys as the administrators of the tool and then setting it up from the internal standpoint so that all your information is readily available and that's your clients are in there, the information for the services are in there so that you guys are good to go on day one from there because there's a lot of setup on the back end for that.

#### **JODY**

1:12:38 Yeah, we have a bad right now. What's the result of that implementation?

**PAT** 

1:12:48 I got you.

## **JODY**

1:12:49 That's going to be embedded on that implementation.

# **PAT**

1:12:52 Well, what I can do here too is to help solidify that. I can try to get on one of our account managers or implementation specialist or maybe just even my manager itself has been with us for a while to better explain what we're gonna do for you on the back end once we get you started.

--- Next Steps ---

# **PAT**

1:13:06 So let me do this. It might be good to bring him in for this next call because he's extremely good... at explaining, you know, what I don't know how would... do you guys have a routine Friday meeting at around this time? Is that what you guys are needing to go to?

1:13:27 Yeah.

**PAT** 

1:13:30 Okay. So that this time wouldn't work with... how would 10 AM your time work next week?

**PAT** 

1:13:42 Friday? Sorry?

**JODY** 

1:13:43 10 AM on Friday. Yeah. Okay. That works.

**PAT** 

Right. So, and then within this, we power this by chili piper. So if you guys need to update this, you can go in and actually reschedule if you need to push it out to the following week or something like that. But what I'm seeing here is that decks available who's deck is my manager. So he's available at this time. So this would definitely be a good fit right here. So what I'll do here is I'll do two things this afternoon. I will shoot over a recap email with this recording on it.

--- Pricing ---

**PAT** 

1:14:20 So at least you'll have that for the time being if you want to go back and review that. And then I'll also shoot you over a calendar invite for the 20 eighth at 10 AM your time.

JODY

1:14:40 I think that.

**PAT** 

very casual, but that's why I came to work at service trade. I, my VP is probably one of the coolest people I've ever worked for. So, this is a good place. There's a lot of quality people that work internally here at service trade. So we'll definitely earn your business here. Let me go ahead and get this information out to you. I'll let you guys run and then I appreciate your time here. I know we went over but thank you so much for, you know, sit down with me here. Keep those. It was a pleasure to meet you man. You guys have any questions? In the meantime, you have my cell, you'll have my email address. Feel free to contact me with whatever comes up. But then we'll focus heavily on... establishing, you know, what it looks like internally from a PM standpoint, kind of walkthrough, the work orders again, give you an idea of the back end on the invoicing. I'll actually show you the dispatcher in the scheduler as well. And then we'll focus as well and implementation.

JODY
1:15:46 Yeah, invoicing. That's
JODY
1:15:52 The theory?
PAT
1:15:56 Say it?
JODY
1:15:56 Again, I'm only seeing Computerease is a nightmare.
PAT
1:16:05 Yeah. So we want to eliminate that for you guys. That's what I've heard. So we wanna make it so you can invoice directly into service trade and out of service trade. Yeah, I've heard some bad horror stories about Computerease. It just seems like it's an outdated tool at this point.
JODY
1:16:21 Users
PAT
1:16:25 Yeah, good question. So there's unlimited office staff, but for your technicians that's all we're charging you for is the guys doing the billable work. So it's the price is per technician.
JODY
1:16:38 What if we hire another technician, how do we implement a new technician lesson today? Yeah.
PAT
1:16:46 Question?
JODY
1:16:48 Yeah, we're in the recruiting. So just following our account rep and say, hey, we've got starting up our account plus one.

1:17:04 Yeah, that's and then they'll prorate it through the end of the life of the contract. They also will get them started on that implementation as well, you know, with the certification process because we want them to know how to actually utilize the tool and utilize the mobile app. You obviously for the technician that's where most of their time is going to be leverage is how to understand the mobile app, how

**PAT** 

to leverage it, how to utilize it in the field. So that's what they'll focus on. But, yeah, from a pricing standpoint and operational standpoint, say that you hire two technicians, you know, next month and you want to get them on service trade, you would just call your account manager and say, hey, Stephanie, you know, we just hired two technicians. We need to get them up and rolling, right? So they would just go in, change the number on the account to from six to eight. And then, you know, you'll be invoice for the next. I don't know if it'll come up, if it will be, it'll probably be price immediately, but then you'll be a pro rated through the life of the contracts to the end of. So, if we started, you know, on the fifteenth, it would just prorate it through the fourteenth of 2023.

--- Pricing ends ---

**JODY** 

1:18:08 Okay. Gotcha.

**PAT** 

1:18:11 And our contracts run annually.

**JODY** 

1:18:15 And so, we could... we have a pretty good onboarding... tool or new tests where we bring in front of them up on how to use service trade? Good morning.

## **PAT**

1:18:32 Yeah, it's the same thing I use. We use this thing called work ramp so that's how they get assigned... the certifications and it's a mix of watching and doing at the same time. So, I'll provide some videos around why these, why the tool is set up this way. And then I'll challenge them as well to perform certain tasks within the mobile apps to get the certification. So it'd B, the basic tasks that they're going to see on a day to day basis that's what I'll have them perform. It's very simple to use. I'll say this, I'm not a very text savvy person, right? So, the fact that I'm utilize it and I learned it so quickly says something. But also, I think, you know, if you guys, if you technicians that are out there plan a fantasy football or if they're ordering stuff from mcdonalds on their phone or take player or whatever, and utilizing those apps, they're going to be able to use this with like a breeze because it's extremely simple. The way it's laid out extremely simple. The way it's supposed to be utilized though, it'll be very simple for your guys in the field to learn more or less. It's going to be on your office staff to just understand the internal functionality of the tool because there's a lot more happening internally for the office staff compare to what's happening out in the field that's how we want it to be set up or I want it to be simple for them to utilize. So that when it's safe to, it's efficient at three. They're getting the information that we need for the office staff to be able to properly, you know, invoices to the customers and get it done quick.

**JODY** 

1:19:57 Okay. Okay. Alright. Thank you very much.

1:20:01	Yeah, no problem.
	JODY
1:20:03	Okay.
	PAT
1:20:04	That's definitely you'll have a great weekend, okay?
	JODY
1:20:06	You too. Thank you.
	PAT
1:20:07	All right. Take care guys.

The End