



ServiceTrade/ Haakon NorthBoundary Demo

Clint Mathis with Haakon Industries
Recorded on 11/30/23 via Zoom, 1 hour 8 min.

Participants

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OTHER

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Transcript

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CLINT

0:00 Hey, Scott morning. How are you doing? Doing great. How are you? Doing good? First one? I like it. Early. Bird gets the worm, right?

KRISTOPHER

0:11 Yeah. I thought Chris would beat me too. We were just on the phone.

CLINT

0:15 I just let them in right now.

KRISTOPHER

0:17 Got...

CLINT

0:18 To say you were here first, I'll just let you in first.

KRISTOPHER

0:24 Too. Funny.

CLINT

0:30 Yeah. Now.

JACK

0:31 Simon...

KRISTOPHER

0:35 All...

CLINT

0:35 Parties coming?

CLINT

0:44 Hey, san, hey, Lauren.

LAUREN

0:51 Just one sec.

CLINT

1:00 Hey, Jordan.

JOURDON

1:02 Good afternoon. Good morning.

CLINT

1:03 Background...

JOURDON

1:05 Thank you.

CLINT

1:07 We actually just, my mom's in town. She leaves tomorrow, but she always comes for thanksgiving and before we leave, she always wants to decorate the tree with the kids. So we did that last night.

JOURDON

1:20 On fine. I'm actually putting my up this weekend surprisingly.

SIMON

1:25 Yeah, mine is also up.

KRISTOPHER

1:28 Mine is sitting in a box. Am I living here right now?

CLINT

1:32 Start, Scott, start, Lisa, start still in the garage or?

KRISTOPHER

1:36 EDI, or wherever?

LAUREN

1:38 I don't even own a Christmas tree... so, I'm way behind.

KRISTOPHER

1:45 Are you going?

CLINT

1:46 To be getting a delivery soon?

SIMON

1:48 Just just wait a couple of years, Lauren, you once you have kids in that zone, it's unavoidable.

LAUREN

1:55 Yeah, no, I, I'm not avoiding of it. It's I just, I don't have one. I don't have one.

CLINT

2:05 Looks like Chris says that he's on, but he says he's connecting to audio. So, sounds like he's been doing that for a little while, so, give him a couple of minutes. We might be having some technical difficulties.

SIMON

2:18 He's pretty familiar with Zoom. So, I'm sure figured out.

CLINT

2:23 Is Jack going to be joining this call?

SIMON

2:26 I haven't talked to Jack to know one way or the other but if he sees here, if not.

CLINT

2:32 No worries. Make sure we have everybody.

CLINT

2:53 Funny every time, like I see Christmas picture like my background before I did software and stuff with soccer and saw him on the call last time here comes Jack. When I saw him on the call last time, I just had like he just reminded me of Ted lasso. Yeah, and it was brilliant. So, I was like excited to see him because, I love that show.

LAUREN

3:17 That's not where I thought you were gonna go. I thought you're gonna say you're gonna make your headshot from when you had a mohop.

CLINT

3:24 When I had her?

LAUREN

3:26 Yeah. Hey, Jack. Hey.

CLINT

3:34 There, is Chris.

KRISTOPHER

3:34 Hello?

CLINT

3:36 Hey, Chris, can you hear us? Okay? Yes, good. I was just referring, you probably couldn't hear me. I was excited when we were on our last call because my previous life, I was a professional soccer player for a long time. Okay? You're my in life, Ted lasso?

KRISTOPHER

3:55 Excuse...

JACK

3:55 Me, you're...

CLINT

3:57 My end live for remembering of Ted lasso.

KRISTOPHER

4:00 Okay. I look like dead lasso.

CLINT

4:02 Yeah. When I was like the last time I was like Lauren, I was like, I don't know if you watch this show or not. I was like, for some reason, I thought he'd look just like Ted last.

KRISTOPHER

4:10 I've gotten that before, but I got that when I had my beard gone and I just had a mustache.

CLINT

4:16 Right.

KRISTOPHER

4:16 I got called that during a santa claus photo tube.

CLINT

4:22 She...

KRISTOPHER

4:22 Said you are Ted lasso. And I'm like, thanks. Let's take this picture and give.

JACK

4:27 Okay. I can sorta see the results.

KRISTOPHER

4:29 Okay. I'll tell you, I think Jason sodas is a pretty handsome guy. So I'll take it.

CLINT

4:34 I was gonna say coming from me that's a compliment because I'm a huge fan, of Ted lasso.

KRISTOPHER

4:39 Santa clause photo shoot was the kit with santa clause, that thing, right? Yeah. Needless to say it was a great photo, big mustache and nice.

CLINT

4:53 Well, good. Well, I know that I believe we got everybody here. So, thank you everybody for joining. I know all of you guys know, Lauren and myself. I wanted to introduce Jordan who's on our sales architect team that really focuses on, the Northboundary product as far as being able to go through. We're gonna kinda walkthrough answer any questions? I know you guys will have some, you know, I mentioned or you mentioned earlier that you guys were using Pipedrive that's correct? Yeah. Okay. And so, you know, I think that you'll the fact that you're already using that and you guys aren't coming straight off excel spreadsheets, things of that sort.

--- Purchase decision ---

CLINT

5:31 You know, it's going to be kind of a easy understanding for you guys. So it'll give you a chance, to give your comparisons to that and obviously using that type of product to go in, and be able to see what Jordan is gonna go through and give you a walkthrough of that stuff, be able to show you kind of what the outputs are looking like, and different things of that sort. So I'll pass it on, to Gordon and let you do your thing, buddy.

JOURDON

5:54 All right. Let me go ahead and share my screen. Everybody can see that. Yeah, do I need to Zoom in or we're good? Where we are?

KRISTOPHER

6:06 No, that's good.

JOURDON

6:08 Okay. I just wanna make sure. So again, good afternoon. So we're gonna be walking through Northboundary sales manager and feel free to again answer questions, stop me at any point if something doesn't make sense or you kinda want me to dive in.

--- *Purchase decision ends* ---

JOURDON

6:24 But what you're looking at here is the landing page or dashboard. So within Northboundary, I do want to point out, I'm a super admin. So this application is a role based on what visibility and what you want your team to have access to do change or manipulate. But as an admin, I'm able to see everything across all of my organizations from top to bottom kinda going from left to right going into each of these swim lanes.

--- *Pricing* ---

JOURDON

6:52 Is the first one you're very gonna see is the opportunity. I'm able to see what we're doing as a team as we propose about one point six and we sold about one point two roughly that we're doing. You quickly see what your close rate is. And this pie chart that is color coordinated is based on these activities.

--- *Pricing ends* ---

JOURDON

7:13 So these activities can be customized, which you're going to hear me say that quite a bit because that's what Northboundary can do is one of his strengths. But these activity tabs can be customized to make sure you're able to quickly see and identify what areas you're performing graded and what areas you know, you may want to invest on resources to continue moving up.

--- *ST app contracts and pricing* ---

JOURDON

7:35 This pie chart can be viewed in three other graphs that is gross margin count and forecasting. So depending on what you want, what visibility you want to be seen and what you're trying to get out of this, you have that ability, to change and go through. Kinda going onto the middle is your member detail.

--- *ST app contracts and pricing ends* ---

JOURDON

7:56 I like to call this your leader board. Who's contributing to that pipeline? Who's at the top? What are their individual contributions? Looking at? What is their close rate? Looking like? I'm not sure if you have KPI for your team, but this is one way to say, hey, you know, we need to stay above a close rate for individually. And you would be able to see that. Now, I like to also point this out that you can give your team some type of visibility so they know, you know what they're doing, who, how my stacking gets my employees and my colleagues going forward. And then towards, this last side is going to be your prospecting activity. What type of activity are we doing? That is contributing to the opportunity pipeline itself. You're able to identify again, what those touch points are contacting currently in competitive PM agreement? E-mail et cetera. Now, you may be asking, okay, this is great. But I need to know who do we contact this week? Because that's my Viewpoint right now. If I hit view detail, I now bring myself into a more in depth screen then I'm able to see who do we contact based on the company, the name and the type of relationship they are having right now? So quickly, see, hey, all these we've done so far have been leads if it was an opportunity or a contact. This is where that would change. And then you obviously able to view this can be pulled as a report as you can see that export, but I can also break this down per touch book. These touch points can be customized. You do not have to help all of them. If you have some unique ones, you can certainly add them. So you're able, to dive through.

--- Type of work ---

CLINT

9:39 Quick question. Chris, what percentage of your customers, our own maintenance agreements roughly?

KRISTOPHER

9:50 Like 90.

CLINT

9:53 Okay. All right. Got you.

KRISTOPHER

9:56 Yeah. Hi. That's that's what we, that's, our as a, as an organization that's something we focus on being. We're extremely proactive. So, if you don't have a maintenance agreement with us, we have no control over the functionality of your property and your equipment and everything, right? So.

--- Type of work ends ---

CLINT

10:14 Brilliant. No. Smart, love it.

KRISTOPHER

10:17 I know a lot of companies do when we've gone to msas before the conversations we've had have been the opposite and I'm like, why would you not focus on this, right?

CLINT

10:26 You'd rather know where your incomes come in and yeah, be predictive.

KRISTOPHER

10:30 Yeah, totally.

CLINT

10:32 Sorry, I just wanted to ask that.

JOURDON

10:34 No, you're good. One quick question. Do you guys have sales program for, your team or not?

KRISTOPHER

10:43 Well, so our sales team is small. It's made up of me and one other individual who has not been with us for that long. The short answer is sort of... so carry on.

JOURDON

11:02 Okay. Well, the reason I missed it is we do have an additional dashboard, call it a sales incentive dashboard that you can. If you develop a program in sent of program as you continue to grow, you can add that within Northboundary, and those individuals will be able to track where they're standing through that. It's just sales incent of dashboard.

KRISTOPHER

11:22 Is that personal to each member? Or, is that customized where everyone can, see where they're at or that's personal to an individual?

JOURDON

11:33 It's gonna be personal. So again, as an admin, I can see everybody in create everybody's but, okay. So... now kinda as a more of a tracking that opportunity, I'm not gonna go there.

--- *Recurring maintenance* ---

JOURDON

11:46 I'm actually gonna go into building out a new maintenance agreement. And so there are several ways to actually get there. I can go to maintenance management or I can also hit this plus button and I'm just go to new maintenance. So when you, when you're doing a new job, it's gonna bring you to this job setup form. And I'm just you just gonna create a.

--- *ST app contracts and pricing* ---

JOURDON

12:12 I'm gonna select the market type. Where are we going? I'm gonna do a college and then you have a location pricing factors. So obviously you may not charge your text the same across different areas, different regions. So with your pricing factors, I'm able to now select based on the region or based on whatever you have selected what you want to charge.

--- *ST app contracts and pricing ends* ---

JOURDON

12:35 And this can be you got as many as you would like. I've seen people doing on an asset basis. I've seen them doing a region, I, business specific because you may have some contracts done that way but I'm just gonna do the main. Then I'm gonna check how far it's gonna take me to get there. And then I'll have your what is the average install year? Once you kind a have this market type, you have your monthly operations, you would now just go in here and select the customer. Now, this is a new customer. We would create one, but I'm just gonna select one for the time being. And now we have that popped up. And so now I have my contact that's associated with this customer, this information is being pulled from our customer management. So as you upload your leads and as you add contacts in, it builds and you're able to find that once that is established. Now I'm gonna go to our asset inventory. This is where you start to build out those PMS. What are you going to be working on? And I do wanna show you. We have a lot of the, these are all what is going to be come with you day one... as you can kinda see, I keep going.

KRISTOPHER

13:47 Yes.

JOURDON

13:48 Obviously, there could be some that you may be using it as very unique to your business. You would just add them in and it's a very simple thing to add in. You would add, the rating table as well. But again, if you have them, we'll help you do onboarding. One of the things we like to do.

--- *Assets* ---

JACK

14:05 So, Jordan, as is, are we putting in like if we have five of one type of piece of equipment, are we specifying that we have that piece of equipment or are we specifying it five times for each individual piece of equipment?

JOURDON

14:22 Are you talking about that?

JACK

14:23 Makes sense.

JOURDON

14:24 Refrain to make sure I understand, are you talking about with your?

JACK

14:28 Good idea.

JOURDON

14:28 We're talking about building out. So if I'm adding assets in for this PM, are you saying, do you have to have five of the same thing or do you have to type it in five different times? Is that what you?

JACK

14:41 Well, good. I guess what I'm trying to ask is, you know, if we've got a building that we're going to look at and it has 10 different pieces of equipment on it. And those 210 different, the list of 10 different pieces of equipment could be categorized as I don't know a rooftop unit, and a heat pump. There's five heat pumps, five, a rooftop units. Are, are, do we, are we setting it up for asset type? So we're only putting two in one's a heat pump, one's a heat cool or a rooftop unit, or are we doing it five times for each?

JOURDON

15:15 So, you would have... the overall, so air, so, I do air handler that's one and in air handler, if you have different types of air handlers, that's what the...

JACK

15:26 Okay. Got you. Yep.

JOURDON

15:29 And so one of the things we like to do is let's say you're building out this PM, but you've already actually done several of these. I can go to this model, look up... and I'm gonna type in a model number because I already know the model number. I'm gonna hit. I now have Northboundary is gonna give me a table. Okay? This is what you've used this model for. These are the filters that has been associated with this before. These are the belt that's been associated with this before. I'm able also to see what job or PMS that I've done this point. So let's say I wanted to use this one here. I'm gonna hit add and I'm done. So not only can you add this individually one by one but to kinda cut time and make this more efficient if you know a model number that you've currently worked before and on another contract, just type that model number in north bound is gonna pull up everything associated with that and you're able to continue to build this out. So now I'm able to go in here. I can add another one and let's say, I don't know the model number. I need to add some additional information. This is where you would go. The second piece of this building out these PMS. Do you guys do currently do sidewalks or site survey?

--- Access to information ---

SIMON

16:43 Yeah.

JOURDON

16:45 So we have a mobile application Northboundary survey and it's on iOS and android. So it doesn't matter which one you're using but the job setup info and this asset inventory build out can be done on the mobile app. So you can actually have one individual on site walking through adding these assets, taking the pictures, recording this data once they've gone through everything, I can call you and say, hey job name test one two three. I've completed the asset inventory look up and everything, please continue, confirm the service pricing and send this proposal all before you leave. They can, they can have all this within 10 minutes because of the work that we've done with Northboundary. It's knowing the asset inventory we're actually.

KRISTOPHER

17:37 Where, sorry, where does internet connectivity fall with all of that? Because a lot of this stuff is done in parking garages and all that, where there's no internet.

--- Access to information ends ---

JOURDON

17:46 You would need a far. But so that is now if you already have some of them on there, it will be there. Like if you kinda have that list, it's there, but.

KRISTOPHER

17:56 So, for some of the stuff, let's say you don't have a connection. We would have to resort to traditional methods that we currently are using or whatever manual data entry or whatever. Okay.

--- Access to information ---

JOURDON

18:11 Correct. Yeah, it would still be that.

KRISTOPHER

18:14 Okay.

JOURDON

18:16 So kinda jumping, I'm gonna switch tabs really quickly because now I'm gonna jump into one that's already been done. And so what I wanna do is I'm gonna go to this creative view and I mentioned taking pictures and being able to see that this is more of an excel view.

--- Forms ---

JOURDON

18:31 A lot of people like this view point. It's a little familiar to them. But I'm gonna go down here to this hot water pump here and there's a lot of data on this label. May or

may not need this information. If I were to go ahead and process this image. I'm now able to see, okay, here's, the data from that in text in bars automatically. Gonna know, I'm gonna auto fill the model, the serial number in the manufacturer. It's gonna know that.

KRISTOPHER

18:59 Can you take a picture outside of this application and pull it in? I'm assuming you can pull it in to Northboundary and then have it process that name plate information afterwards, right?

--- Forms ends ---

JOURDON

19:13 Yes, if I were to click upload and I had.

KRISTOPHER

19:16 Perfect. Yep.

JOURDON

19:19 So, the same way of filling it in manually, you could take the picture in north bound to reduce some of that information for you. But once you have that information done, the pictures, the belts, the filters, I'm gonna go onto now, my service pricing... here's now where I can see how much we're going to be charging, how long does it take to do, these services based on the year or the season, what text are involved?

--- Pricing ---

JOURDON

19:49 And then the service programs. So I quickly see, you know, my tex, about 31 hours beats actually 2020 and a half, so on and so forth. I'm also able now to see my material cost and then what would I sell these PMS whether it's a plan maintenance or for coverage? I need to move you guys over... there. So towards the bottom based on calculation upfront will be 31 or 17, but let's say, hey, I need to sell this a little bit below because I want to get that pulled through work later on.

--- ST app contracts and pricing ---

JOURDON

20:24 I'm gonna sell it at 30 percent Northboundary, you wanna tell me exactly what that price is, vice versa. If you just want to sell it at a set price, you wanna know what that gross margin is. North bound would do, the exact opposite. And then I'm also again able to add additional time.

--- ST app contracts and pricing ends ---

JOURDON

20:44 Let's say, hey, you know, this is a school and I know it's gonna take an additional, I want to add, you know, additional 50 minutes. It will add it to the entire PM or I can only have it for certain ones. So again, you know, doing this information, you're able, to manipulate change this and, you know, pretty quickly. But I also like to let this know if somebody is not as experienced or doesn't know the industry that well. They can quickly go in here and say, hey add additional time to everything only add additional time here. Put it at 30 percent. There's no real work were thinking today, just clicking a button and it goes through.

--- Recurring maintenance ---

KRISTOPHER

21:26 How customizable is the spring, summer, fall, winter coil cleaning?

JOURDON

21:32 How customers?

KRISTOPHER

21:34 It's not.

JOURDON

21:35 No, it is. But how, what are you, what you trying?

KRISTOPHER

21:37 So, so I'm thinking about like boiler cleaning, cooling tower cleaning, you know, carbon oxide sensor, inspections, backflow testing, right?

JOURDON

21:46 Adding those additional ones in here, so.

KRISTOPHER

21:48 Yeah, because those are all profiles that we cover as part of our scope. And those, we always separate them because there are different frequencies and different costs.

JOURDON

21:57 Okay. Now, that based on each asset because you can't in the rating table, add that information in based on each one. But you're saying you want that set separated?

KRISTOPHER

22:07 Yeah. So we don't so how we typically do and that's not to say that the way we do things now couldn't be adjusted. This is all new. What I'm seeing here, but typically what we do is we have, for a lot of buildings we have like a semi annual major where we cover pretty much everything... and then a semi annual minor where

we cover a few pieces of equipment out of that major that require filter changes. So we hit those four times a year. And then we'll do an annual boiler cleaning and annual cooling tower cleaning and annual backflow testing and annual co center inspection.

--- Recurring maintenance ends ---

KRISTOPHER

22:43 So a lot of things are once a year, and then some stuff's four, some stuff too. So I wonder how customizable those different frequencies and profiles would be in this.

JOURDON

22:57 Can get it pretty customizable as I mentioned that's what Northboundary is. But again, I have it, nobody's asked to have that.

--- Quote templates ---

JOURDON

23:06 So it's kind of the standard way. Okay. Now, kinda once this information is good, this is confirmed, never goes to the proposal and the proposal is actually done. I wanna leave it because I wanted to stay the same, please leave. Thank you. So with Northboundary, the proposal itself, you're gonna add your profile picture. So we know that it's from you and you have your table of contents and you have your executive summary. Now, I'm pretty sure you guys currently use some type of some things that you send out some language that you send to your customers. If not, we can have, we have kind of a standard one as well, but this is all done through word. This is nothing fancy any templates that you may have. We upload those and you can still currently use them, but let's say you kinda forgot some information you wanted to add that in. You can add that in real time and actually save that. I can change the name since it's not from Erin.

--- Quote templates ends ---

JOURDON

24:07 It's from me. I would change that so they know, but this is what that template would look like. You then have an introduction again already up to date, couple of other tabs and then you would go down to the agreement. Then the agreement piece is based on, you know, what are we doing?

--- Pricing ---

JOURDON

24:23 Are we going to a plan maintenance? Are we going to do a full coverage? Are we going? How long is it for three years? How often are they gonna pay quarterly? This is how much they're gonna pay. This will be the total amount the contract is gonna start on October first and it's gonna end on September thirtieth 2020 sixth... this.

KRISTOPHER

24:43 There is, what if there's no end date... because, we roll our contracts over. We don't reach out. We just, we bump it on the, on an annual basis based on cost living and inflation. And there is no end date or does that even matter if there's no end date for us?

JOURDON

25:04 I would say the reason, it kinda matters with because there is some escalation in here with year over year. So I would say, hey, you can make it 10 years and, you know, kinda that that's very long, but you can have it set as you won't have any escalation and you can kinda change that if you want to or.

KRISTOPHER

25:25 Does it show an end date on the final product?

JOURDON

25:28 Yeah, it will show it in day on the agreement piece.

KRISTOPHER

25:31 KPI.

JOURDON

25:33 Yeah. So you, would, it would have to go go one to 10 years, but again, you kinda said you do that basically because of inflation and depending on what...

KRISTOPHER

25:42 We, we do that because we don't we'd prefer to just not talk about it and keep the contract going. I'll be honest that, that's not to say that we don't do check INS, but we don't go, hey, just let you know, we're raising our rate by three to five percent.

--- Pricing ends ---

KRISTOPHER

25:56 We just go, we're raising this and we're carrying on. And if you got, if you know, if you got an issue, call us like whatever that's what we do. And it was, so, yeah.

SIMON

26:06 Is there an opportunity to use this sort of as the pricing is valid through that date, where it will then hold pricing as quoted until such a date. And then after that, we do the increase. So if we did something?

--- Pricing ---

KRISTOPHER

26:22 Sales.

SIMON

26:23 Like November, you know, we could put not the upcoming January but like four months as the end date. And... then the price would wouldn't increase, with our standard... annual increases. Does that, does that sorta seem like the right use case for this date?

JOURDON

26:47 Yes, if you're a correct.

--- Pricing ends ---

SIMON

26:50 Yeah.

KRISTOPHER

26:50 Yes.

JOURDON

26:52 That is correct.

KRISTOPHER

26:53 Okay. That makes sense. Then Simon can do that.

JOURDON

26:58 And so once we kinda have that information, I'm gonna hit print proposal. And if you know, this Northboundary again, is giving me some pages that are pre selected based on the program that I have.

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

JOURDON

27:11 Obviously, you can deselect, you can add things if you would like. But if I were to hit print... think and we're going to have this final proposal is gonna pop up. The first thing you'll see is the cover page. So have the company that you're working with it or you're sending this to there logo, who created this?

--- Assets ---

JOURDON

27:35 Your table of contents, executive summary, everything that was in here, you have your program overview. I wanna keep going with the mouse, you can kinda see all this information. So this is all included some tasking that may or may not be included or provided based on each asset or we're to get down to page 15... here's. The actual agreement. This is what this looks like.

KRISTOPHER

28:05 Is on. Hey.

JOURDON

28:11 And then again.

JACK

28:12 Is there, is there an actual equipment list that shows the equipment that's being maintained?

JOURDON

28:17 You're jumping ahead but absolutely, I'm going all the way.

JACK

28:20 I'm sorry, I didn't...

KRISTOPHER

28:21 Okay. Yeah, that's...

JOURDON

28:24 We do have the inventory equipment.

JACK

28:26 Got you.

JOURDON

28:27 We also have all the pictures that will be included. So if you take some you want to include as well. Yeah.

--- Assets ends ---

KRISTOPHER

28:35 Yeah. And, this is customizable like that. That checklist that's what this is related to, right?

JOURDON

28:42 Correct.

KRISTOPHER

28:43 Yeah. Okay. Because this is a lot, I price down a bit, but it's I get why it's all here. Like you want to show this. I get it. And that's good.

JOURDON

28:50 Again, you don't necessarily because you can check box and take things off.

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

JOURDON

28:53 Like you said, some questioners may not want all this, they may just want to see the agreement and keep moving. But again, and then that last piece, how you actually, I always have is people to send this out via E sign. Now, you can download this as a PDF or word document. I can save this as a file to the opportunity. So you may have multiple that you want to send and attach. You can do that. But the reason I do E sign is because when we wanted to see that they're gonna sign this contract, but if I go to sign and I were to go here more info, I now have a trail or electronic, what they were doing, I know when I signed it when I sent it and when it was opened and when that document was signed to them all the way to the point of you can actually tell what device they were on.

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

JOURDON

29:46 So they may say, hey, I didn't look at this on this day. Well, you kinda did, you may have looked in on your iPhone accidentally at this time little creepy. But again, we want to help people accountable here. That's why that's they do the E sign and that was what that looks like.

--- Recurring maintenance ---

JOURDON

30:03 And then the last piece, I do want to show you an additional PM because within the agreement, you can also add additional information like standard overtime, double time, monthly, quarterly, depending on how detailed you want to get your billing and how much information you want them to know this.

--- Pricing ---

KRISTOPHER

30:23 Does that billing that monthly quarterly annual total that those payments don't there's no relation to what we're doing in terms of those payments? Is it's just a cost structure?

JOURDON

30:41 Yeah, but this is something that she would actually make.

KRISTOPHER

30:45 Yeah, I get that. Well. What am I paying for from the customer monthly for? What, what are you doing monthly for 240 bucks?

--- Recurring maintenance ---

LAUREN

30:52 Right.

JOURDON

30:52 Sorry, I could not see what you were talking about. This. So it was based off what the plan maintenance program was. So they broke that down into monthly quarterly because if you notice on the agreement, we select, what they wanna pay. But if they say, hey, what's the difference between monthly quarterly or annually, they can, we now give them, we can show that option to them if you want to.

--- Customer engagement ---

CLINT

31:21 So that's the.

SIMON

31:22 Same, this, if we were to multiply that out that annual, it's just four times the quarterly essentially.

KRISTOPHER

31:28 Right. Yeah, cool. Yeah, yeah. Okay.

CLINT

31:31 Yeah. And just to add to this, I know that this is probably not as robust as you would make it seem or what you would wanna do as well, but it's just giving you the option that if you do have some customers that require this or certain things is to make it easy for those, maybe not as veteran sales reps or whatever to be able to go and access this information with just a couple of clicks of a button and make it super easy for them to go and help sell you guys more agreements.

--- Customer engagement ends ---

CLINT

32:01 I know you guys are smaller on the sales side now, but as you guys grow and maybe you have, you know, some web behind the ear sales guys or whatever it's going to be an easy flow for you guys, to walk them through this type of process to be able to go.

--- Quote templates ---

CLINT

32:14 Hey, it's just a couple of clicks of a button here and it's gonna put all those pages in for you type of thing. But like I said, it's not that you have to use all this

information but it's there for you just in case you do have one of those customers that need it to rebuild a whole new system or whole new proposal and things for just some one offs here and there.

--- *Quote templates ends* ---

KRISTOPHER

32:36 Hum. Yeah.

JOURDON

32:40 Then the last thing, excuse me that I wanted to kinda just talk over how light is it at the actual opportunity? So this is what that all looks like. Hey, what is the stage that is? You're able to change that in two different places probability? I like using these qualified or selling, these statuses again instead of guessing what percentage we're at again for some of your, the newer people who may not be as tenure when it comes to selling and knowing what the percentage may be opportunity type, who's involved, who's going to get that credit? And then as I'm mentioned before the file, so here's an additional PM that I've already sent out to them that is attached if I wanted to add this to a new one just so they can kinda see or have some visibility. This is where I will go to pick that up.

--- *Forms* ---

JOURDON

33:27 But this is like your file candidate for the opportunity. Anything you need to do from pictures, documentation, anything of that sort. And you have the ability to add an additional 10 boxes or text fields that can be a combination of filling a blank or drop. Now on the CRM side, and then you have your activities. This is where you would go.

--- *Forms ends* ---

KRISTOPHER

33:51 To...

JOURDON

33:51 To track and then you have reminders in events... as well. Any questions on just the total process... or?

KRISTOPHER

34:06 North bound?

JACK

34:10 I've got a question. The equipment lists that you build out and put together. I keep sounds like I'm fixated on equipment list when we, when notice how I say, when we close the contract... and it becomes a contracted customer for us. Does that equipment list? Can it all get imported into service trade then? So we don't have to

redo that. That's probably a hanging curve ball get to build out of the park but I'm assuming it slides across and we, we've got that data captured now that it just becomes part of our stuff in service trade when it's a signed contract?

JOURDON

34:51 You can export, the asset list to serve, sir? Yes.

KRISTOPHER

34:56 Okay. Yes... good.

JOURDON

35:02 Anything else?

KRISTOPHER

35:09 I'm still processing... very similar Pipedrive. We'll say that maybe the same developer or something like it. It's like it's very similar. But yeah, that's good.

LAUREN

35:26 The gentleman who actually created this product is a guy by the name of in Google. He spent several years at Simon selling, not selling but working in the maintenance department and kinda that's how he kinda built this database equipment and tasking and all that stuff. And he is actually part of the link network at one point as well. So, it's really built out based on his decades of experience. I don't believe he worked with Pipedrive, but he may have drawn inspiration from other CRM systems, but really, you know, his fingerprints are most noticeable on like the robustness of the equipment database, how the agreements are kinda outlined and things like that?

KRISTOPHER

36:17 Is there any way to... as far as customization goes? Let's say hypothetically, we wanna put together an agreement that allows for three different, I mean, this might be a bit tough, but three different options. The first option being the most basic maintenance. The second being a bit more of a proactive outlook. And the third being like the ultimate proactive maintenance option... that's a pretty high degree of customization. Like the third option having drain cleaning in it, having, you know, for even though we don't provide this right now, but fire protection in it along with everything else in the building, hvac and hydronic related like that's where I envision our sales efforts evolving too.

--- *Purchase decision* ---

KRISTOPHER

37:08 Is that a little bit on the, is that a little bit too complex for this? Or... is that something that could potentially be achieved?

JOURDON

37:22 It's something that could be achieved?

KRISTOPHER

37:25 Right.

JOURDON

37:27 I would say it could be achieved in, yeah, so.

KRISTOPHER

37:30 I would say that?

KRISTOPHER

37:38 I think I'd have to dig into this a little bit to.

SIMON

37:41 Like the advanced training session, yeah.

LAUREN

37:44 Yeah, or I don't wanna.

KRISTOPHER

37:45 Make it too easy. I mean.

LAUREN

37:49 I was gonna ask Jourdon can you expand upon that a bit or, do we know who we can ask to kinda look into that functionality?

JOURDON

38:02 I don't actually know the correct way, to dive into it. I can ask.

--- *Purchase decision ends* ---

LAUREN

38:09 Let's do some research. Let's do some research on that because that sounds like a pretty important thing.

KRISTOPHER

38:16 It is, it is, yeah, it's something that we're not doing right now but that I'd like, to implement to give our prospective clients some options as far as what, and how they want their systems maintain.

SIMON

38:30 Yeah, we're assessing this is like, you know, a system hopefully for the next 10 to 15 years.

KRISTOPHER

38:36 Yeah.

CLINT

38:36 We...

SIMON

38:36 Definitely want to be forward looking.

KRISTOPHER

38:38 Yeah.

SIMON

38:39 I have a different line of questioning if are open to it. So there's a customer management piece there and I'm curious how integrated that is with service trades, general database.

JOURDON

38:57 I'm sorry, you said, how is that integrated with service trade?

SIMON

39:00 General database? I mean, there's obviously customers, property managers, asset managers, you know, building ops people and, you know, those are all contacts that we would have and they're you know, our customers evolve over time people come, they go, they're involved with one contract, then they're not. And so we have all these contracts which would ideally be in our, you know, within our service trade environment where we're servicing them on the regular basis, they're receiving quotes and we send them all that kind of stuff. And then we have, and then we have this sort of prospecting but there's a real overlap between especially when we're selling additional agreements to customers, we already have, maybe it's a different building or a new service within a building. And I'm just wondering what the, how that integration works.

--- Accounting ---

JOURDON

39:52 You can import all of your ServiceTrade customers into Northboundary, and the relationship will still stay the same. So if you have three different companies and with 10 contacts in each in ServiceTrade and you want to bring them over, it will, if I were to hit this button, I can import those, from ServiceTrade.

--- Recurring maintenance ---

JOURDON

40:12 And then the breakdown is that parent child. So here's, the parent company, here, all the child or all, the subs. And then within each of these companies, there are contacts that are associated with them. Within those, there is also contracts. So, you know, and brag may have a different contract than 10 and I care, but they're all under the same and both. So you can do that. That answer your question?

--- *Recurring maintenance ends* ---

SIMON

40:34 It's in the right direction. So in all of those contacts to then we do, we then have like information on the individuals like who's our contact, who's our lead?

JOURDON

40:50 Yes. So if I were to go into one... and here's your related contacts. And then if I were to actually go just so you can kinda see what a contact, what that information looks like. Now, I'm actually in the contact associated with the company and I can add some information. So it would be their phone number, their mobile e-mail contact owner will be, the gist. And then as their title, their manager with their.

SIMON

41:16 So, my line of questioning is related to how they integrate.

--- *Dispatch* ---

SIMON

41:20 So let's say that that's not John Smith. Let's say that's John Smith and John Smith, Mary's John brown and wants to change her name to Jon brown. Where do we change that contact? Do we change it in your boundary? Do we change it in service trade? How do we keep those contacts aligned?

--- *ST app contracts and pricing* ---

JOURDON

41:43 Yeah. So you would today, you would change them in both. Okay, there is today, you would change them in both, but there is a, we want it. So it can be BI directional. So you, if you change it in one, it would automatically change in the other. But as of today, you would change in both.

--- *ST app contracts and pricing ends* ---

SIMON

42:00 Okay. I'm assuming it's similar than if say like John Smith is now looking at 30 30, I care, but let's say they have, a shuffle of portfolios within their office. And John Smith is now, you know, no longer on this site, but he's looking after some, you know, some larger commercial sites now, and he's got a new person that's looking

after this site. And how do we move that information around? Is that similar? Now? We'd have to change it in... Northboundary and also change it in service trade?

JOURDON

42:31 Correct today. Yes, you would, there's a little bit of double work right this second.

SIMON

42:37 And...

CLINT

42:37 Just to speak on that, from the service trade side as well.

--- Recurring maintenance ---

CLINT

42:41 If there's contacts move to a different location or anything within your system. When you go to add those contacts, there's two options, you can add a new contact or add an existing contact. So if you went to say another location or another child company or whatever inside service trade without having to go add a new contact, you can create new contact, look up John Smith and then click his in his information would come over automatically. So it's not like you would have to double data, all that information with inside ServiceTrade, if that makes sense.

--- Accounting ---

SIMON

43:14 Right. So if you're importing contacts, you're importing them into like a general database. And then it's a quick look up. When you add them to a specific.

CLINT

43:23 Just something new, that is correct.

SIMON

43:25 So there's there is some degree of like reduce data entry by.

CLINT

43:31 Right. And then just so like Jordan said, as we're continuing to build out more and more of this integration. Once you're inside service trade and you do move him, John Smith to a different location that's kinda process over in the Northboundary automatically, you would have to do both.

SIMON

43:47 So then I guess the question that now sorta goes into conflict management, right? So, if Jones Smith has been changed to Joe brown and service trade, and now

you, your import, you like re, import the contacts from service trade. Does that create a new contact, John brown or like, is there a?

--- Dispatch ---

CLINT

44:14 Know you're saying on?

SIMON

44:15 Management thing, right?

CLINT

44:16 I could, if I could like, it would almost be like you're saying, hey, this looks like a duplicate entry because John brown and John Smith have the same e-mail address and same phone number that I don't know, I can find out on that. Do you know, Jordan?

--- Dispatch ends ---

JOURDON

44:32 I don't know if this up in my head.

CLINT

44:33 I'll find that out for you. So I know exactly what you're saying as far as like you can go, hey, is this a duplicate entry? Because these people have two different names, but they have the same contact information. So I see what you're saying.

SIMON

44:45 Yeah. I mean, data integrity over the long haul is absolutely paramount. And we need to make sure that systems we put in place, you know, that they're easy to maintain because otherwise, once data is bad, it's...

KRISTOPHER

44:57 Horrible.

CLINT

44:58 You are 100 percent.

SIMON

45:00 Yeah. If you guys could find that out be awesome. And, and if you have a time line, on the two way communication in terms of those contacts, that would be okay, I'd love to know that as well.

CLINT

45:18 Just taking some notes here.

JOURDON

45:21 Any other questions? Great questions?

SIMON

45:25 I have another one. If we are doing like an annual increase, for contract pricing.

--- Pricing ---

SIMON

45:34 And, and again, I don't know if this would be service trade Northboundary. How that fits. But like, so, we put an end date for, you know, January or December 30 first 2024. And the intention is to increase by five percent for January first 2025. So, you know, we would need, we need new contract pricing brought into our service trade agreements.

--- Pricing ends ---

SIMON

46:07 How do we, how do we manage those increases? Are we, can we do that within Northboundary? Is that a new proposal that gets pushed? Is that a service trade... update?

KRISTOPHER

46:25 Sorry, go ahead.

JOURDON

46:26 No, go ahead. She could finish in the.

JACK

46:27 No, I was just wondering.

KRISTOPHER

46:29 Just be a push notification from Northboundary that we've set a rate increase period or something like that?

--- Pricing ---

JOURDON

46:40 Yeah. So when it, make sure you're saying you have one contract that ends on the 20 in 2024 and you want to start a new contract, January first of 2025 with the five percent increase.

SIMON

46:51 Yeah. I mean, we want to get the increase when we want to record that.

--- Pricing ends ---

SIMON

46:54 We've we've updated, the pricing even for our own records. It doesn't have to be in Northboundary, but I'm just curious how in the service trade Northboundary partnership, what's the ideal workflow for that? So.

JOURDON

47:09 If it's not one contract that already has that escalation price in there, you can do it in service, right?

--- Pricing ---

JOURDON

47:18 But if you had, if you had a contract that was in that went through 2025 the year... January of 2025 that would be the year that the five percent increase will happen, it doesn't have to happen. It doesn't have to happen every year, but you can select what year you want it to happen at, if that.

--- Pricing ends ---

SIMON

47:39 And how is that? Go ahead Chris?

KRISTOPHER

47:42 I don't know if you're on the same line here, but, and how, is that a manual update or is that something that can be automated?

JOURDON

47:50 It's a, you can either one. So I said it per location pricing location factor and so that's included there or if you wanted to kinda just doing one off, you can do that as well.

--- Pricing ---

KRISTOPHER

48:03 Is that in Northboundary or service trade, I guess it's...

JOURDON

48:08 The location price back is in Northboundary.

KRISTOPHER

48:10 Okay.

SIMON

48:10 Can you walk us through that? Is that an option?

JOURDON

48:15 So I were to go into my settings... maintenance pricing factors, I'm just gonna select one here's. The escalation for here. So depending on, if we're in 2023, right? Yeah, 2023 in year two or year three of that contract or no, it'll be actually year two because next year will be year one, I would set the five percent then. So I would set this here at five percent. So they know that's what that's going to be included in.

KRISTOPHER

48:50 So, they know in the physical contract, what that number is going to be, and so on. But beyond that, sorry, go ahead.

JOURDON

49:02 They won't know the, they won't notice, you have a five percent increase. They would see that number. You guys will know what that is from there. Now, if you want to include that in that maintenance billing, that's an option. Yeah.

--- *ST app contracts and pricing* ---

SIMON

49:21 Yeah. So this is an anniversary based price escalation based on a multi year contract where the escalation is essentially predefined ahead of time. I'm assuming once that contract is built out, those escalations are then hard coded into that contract that you can't come in and edit that further after such a time as that contract is approved regardless of whether it's been shown to.

JOURDON

49:45 Correct. Yes, sir.

SIMON

49:46 Yeah. So, this would apply to like our cataracts and our cauliers, where they've you know, they want known pricing for.

KRISTOPHER

49:55 Yeah. And I'm assuming...

SIMON

49:57 What you showed us there, Jordan, is, the default and can that be edited on a per contract basis if there's specific terms?

JOURDON

50:06 You could, but that would be in the additional user defined notes that I showed you in that, on this additional proposal?

KRISTOPHER

50:13 Yeah. Okay. Yeah.

JACK

50:20 Cool.

CLINT

50:23 Chris, what's your comparisons? Like you said, it's a lot like Pipedrive, what's your comparisons to this as far as what differences are there?

KRISTOPHER

50:33 Well, I see a lot of comparables in terms of... like the pipeline. So, your sales pipelines right? Where you're you know, contact made information gathered. Yeah. However you have it set up, I see a lot of similarities there. And actually just, the way this is laid out is fairly similar. I mean, this essentially has Pipedrive built into it. So... yeah, I mean.

--- Pricing ---

CLINT

51:12 Gotcha.

KRISTOPHER

51:13 Kinda takes the CRM part into account one last question on the pipe, the price increase the set escalations. So let's say, you know, we get a contract signed in April and we want to escalate it by five percent, in April of the following year, is that and you might have covered this already, but that's something, that can be automated, right? Like that's something we set, and it's going to be automated as Simon said hard coded in service trade that it's gonna hit another five percent in April of the following year?

JOURDON

51:51 It will be hard coded Northboundary?

KRISTOPHER

51:53 Boundary, but that's going to be an automated process.

JOURDON

51:57 Yeah. Well, because what I just showed you, yeah. So any time I select that pricing factor, so anytime I select man that.

LAUREN

52:04 Second.

JOURDON

52:05 Year is going to have a five percent increase, no matter.

KRISTOPHER

52:07 What? Okay. So we invoice the next set of maintenances for 2024 let's say... and the first maintenance that we invoice is going to show that five percent without our team manually doing anything.

JOURDON

52:26 Yeah. The boundary has their price included in there?

--- Pricing ends ---

SIMON

52:30 Yeah, that push to service trade?

KRISTOPHER

52:32 Yeah, that's what I'm asking is that push the service trade?

JOURDON

52:35 No, that, the, as it will not.

KRISTOPHER

52:37 Okay. So, so, to implement any annual increases, it's gonna show in the contract numbers wise. But as far as service trade and that process being, there is no automation within service trade to do that, there would have to be, is there a notification that Northboundary can provide to let's say an e-mail address or whatever that's saying, hey, the one your point has hit, you need to, you need to increase it or you need to reference Northboundary and get the increase in place, or something like that?

--- Pricing ---

JOURDON

53:13 You could set tags and notifications within service rates and notify you to say next year, there's a five percent increase of that. You can set those.

KRISTOPHER

53:22 Okay. So the workflow would be contract approved, get it into service trade, set it up based on what was agreed upon in Northboundary, so that we don't miss this annual increase.

JOURDON

53:35 Right.

CLINT

53:36 And then in service trade, you would just change that price agreement that you already have in there.

KRISTOPHER

53:41 Manually...

CLINT

53:42 That five percent increase.

KRISTOPHER

53:43 Yeah. Okay.

CLINT

53:44 And then that next year or any time you're invoicing whatever that pricing agreement is, you'll be fine.

CLINT

53:55 From a show?

KRISTOPHER

53:56 Far out in service trade, can you automate if, can you like how far out like you got a three year agreement in every year? It goes up five percent based on, you know, what was signed. Do you have to manually do those increases every year? Can you put in a three year incremental increase to that contract that you can set it. And, you know, I hate to say this. Forget it.

LAUREN

54:23 Let us confirm that there's some, there's a lot of richness to our contract feature in service trade. And there's a lot that it does. But I don't wanna tell you the wrong thing. So we'll look into to the answer.

KRISTOPHER

54:35 Because that would be, that would be really nice because then it's we know we're covered based on what was agreed upon. And even if it's only one year granted the one year, we don't typically know how much we're going to be increasing it by, until

we get up. We were leading up to that anniversary date, it's still, that functionality is still really useful, if it existed.

CLINT

55:00 And that was going to be like one of my questions, like since you guys don't have in dates, you're not automatically having these price increases setup you guys are going in and doing that when that next year comes?

KRISTOPHER

55:12 Yeah. It's it's like, it's our process isn't great. We kinda do it in January and it shouldn't January is like a contract could be, we could have a contract in place.

--- Pricing ends ---

KRISTOPHER

55:23 We try and wean out the ones that aren't that haven't hit a year and manually don't increase those. And the rest, we just go across the board here's. Five percent, right?

JACK

55:37 Our, our contracts or like hotel California, you can check out any time you like, but you can never leave.

KRISTOPHER

55:44 Yeah.

CLINT

55:45 A... no, for sure. I don't know if you're providing the service or whatever. I mean, I totally get where you're at it's not like it's something that it's horrible that you guys are doing by any means?

KRISTOPHER

55:57 No, it's written in the contract. They know exactly what they're signing up.

CLINT

56:00 Right, exactly. And so, my thought process, the reason I'm asking is if you're building these out and it has that escalation in there, but you don't know what percentage do you like? How often is that percentage the same? Because obviously, you don't know with inflation and everything else that is gonna change. So.

--- Pricing ---

KRISTOPHER

56:19 You know, and especially in... the economic status in North America, like it's fluctuating monthly, right? So.

CLINT

56:32 The reason I say that is I don't know if that per SE section of going hey, year two escalates to this to year three, escalates to this, you already set yourself up for that agreement. So I would not be beneficial.

--- *ST app contracts and pricing* ---

KRISTOPHER

56:46 Exactly. And sometimes that's just the agreement that the customer wants to set and we do our best to be competitive and try to predict where our costs are going to be in a few years, and we hope that we get the pull-through that, you know, supersedes some of the margin lost in predicted unpredictable costs. So.

--- *ST app contracts and pricing ends* ---

CLINT

57:06 How much, how much pull-through are you guys getting?

KRISTOPHER

57:09 I don't know we're we, at two and a half... I haven't checked in a while. Okay? Scott would.

SIMON

57:18 We're in that range pre code, we're higher, but.

KRISTOPHER

57:21 After one, something like that.

SIMON

57:23 Or two to one even right now depending on.

CLINT

57:28 And that goes back to, you know, just my brain and wheels are turning. Like if that's not beneficial for you, then, you keep it at those years of what that price is. And then we find out ways to set up those reminders because then you can go in and change those pricing agreements to whatever percentage you want. Yeah.

SIMON

57:46 Like that's currently something we'd look to, the core service trade. Yeah. Yep.

CLINT

57:52 That's that's what I'm thinking on that regard. Just go ahead and do these. You put the in date to whatever you want because the in date doesn't matter to you guys except for that per SE, escalation or price increase.

KRISTOPHER

58:05 Honestly, it would be a two weeks to a month before, the annual anniversary hits. And then we would figure out what's fair based on what the market's dictating as it in a.

CLINT

58:19 And then you would have no, yeah, that would be like, it's almost like a yearly audit to go through all your customers, do that. And then you would have... everything.

KRISTOPHER

58:27 Unfortunately, it would be, it wouldn't be a yearly audit. It would be a monthly audit because are signed every month. So it's actually a pretty more to it than.

CLINT

58:38 I...

KRISTOPHER

58:39 Like, but...

SIMON

58:42 So, what about prospecting? If we're if we're looking at that system like one of the prospecting and word to use, but I think a common use case is like Chris has gone and he's made a bunch of contacts and he's talked to a bunch of people and he's probably put them into right now Pipedrive, none of the rest of us know who these people are because we've never met them. We, we have no idea. And then they call our main line and they're looking for something I'm just kinda curious in terms of like just a quick searches for our team to kinda know... who this person is, what they're up to... what that would look like for like a base level user.

JOURDON

59:24 You can search through contacts. I share my screen again, hold on... right here. So I'm in all contacts and you can just search by name.

SIMON

59:36 So, if you pull that up, I'm just curious as like what information is like and how easy it is to see.

KRISTOPHER

59:42 Yeah. Can I put something in here saying like met this guy at, you know, some launch in or some golf tournament or whatever. And like I'm assuming I can put all kinds of info in for?

JOURDON

59:55 So, that's where it comes here. So I'm in los, Henry Edwards contact over here on this side, I can add any additional information that you may want to add. So here's some notes you can add.

KRISTOPHER

1:00:07 Okay. Yeah. So, notes will pretty much cover that... or even if I meet someone and take a picture of their face and upload it.

CLINT

1:00:20 Yeah. Like just don't move totally stay in there.

KRISTOPHER

1:00:24 So.

LAUREN

1:00:24 Weird.

KRISTOPHER

1:00:27 Yeah.

CLINT

1:00:28 What?

KRISTOPHER

1:00:29 I'm gonna do with this, okay?

CLINT

1:00:30 Sounds like you're reminiscent santa photo shoot.

KRISTOPHER

1:00:33 Yeah. And, and work with us because we're not weird and we're a good company?

CLINT

1:00:39 That would work.

KRISTOPHER

1:00:40 Yeah. Have a good.

CLINT

1:00:41 How many, so, have you taken as meeting?

KRISTOPHER

1:00:45 I'm a good salesman despite what other people might say?

JOURDON

1:00:49 That...

LAUREN

1:00:49 Makes me wanna dig out a picture of you in your seventies garb?

KRISTOPHER

1:00:52 Well, side was there too. So it's Jack.

LAUREN

1:00:55 I know.

KRISTOPHER

1:00:57 Yeah, we're all going and...

LAUREN

1:00:59 I'm gonna put that in Salesforce.

KRISTOPHER

1:01:01 Get it in there. No, that's good.

--- Quoting ---

KRISTOPHER

1:01:04 Those, those are handy. Yeah, I think that would be, that would be sop for us is get all the information in regarding an individual new contact existing, whatever relationship, everything be handy for anyone to reference? I...

SIMON

1:01:24 Is there any kind of an indicator on like quality of opportunity or is it just where they're at, in the pipeline?

--- Quoting ends ---

JOURDON

1:01:33 What you mean about quality?

SIMON

1:01:34 Well, I mean, like sometimes if you need a contact and, you know, they're really keen and you probably close the contract, but it's you know, it's there, they own one little tiny strip mall, and then sometimes you meet somebody who's like, you know, director level, western Canada, major property or like property management company, and it's like, okay, there's the opportunity is significantly bigger. This is like, a higher quality.

CLINT

1:02:00 A B kind.

SIMON

1:02:03 Yeah.

LAUREN

1:02:04 Like a target account, like a list of like top accounts that you wanna kinda go after. Is that what you mean?

SIMON

1:02:11 Yeah, I'm thinking more of like, the random connections where we're just like we're meeting people or, you know, engaging with them, we're putting them in the system and maybe they will be a target account, but for now they're just like they're just a quality opportunity versus like...

LAUREN

1:02:27 Yeah.

SIMON

1:02:28 Somebody maybe.

LAUREN

1:02:31 Jordan, do you know the answer to that? If not, we can look into that. I don't know at the top of my head.

JOURDON

1:02:38 No, I would say, the notes leaving notes would be one, but I can look in, we can look and see there's a more a different answer.

SIMON

1:02:48 Yeah, I'm just thinking sort of further down the road that you can get all these contacts in and how do you categorize them to know who you'd you know, who you do the follow ups with and who you're yeah, just more of a prioritization piece.

CLINT

1:03:02 Okay.

CLINT

1:03:07 And that's like at the contact level where you could say, hey, like a, red, yellow, green type of thing where you can say, hey, you know what this is, could be a top opportunity. This is an okay opportunity and this last opportunity, a tire kicker, yeah.

--- Dispatch ---

LAUREN

1:03:31 I need to join another call, Clint. Do you mind wrapping this up with the team? I know we have yet management?

CLINT

1:03:39 Yeah.

KRISTOPHER

1:03:41 Yeah, I appreciate it.

JOURDON

1:03:43 I will say this. And as Clint, as you mentioned labels, Simon, this could be something again, I'm gonna look into it a little bit.

--- Dispatch ends ---

JOURDON

1:03:50 But if you can have labels that can be attached, so you can say top account, okay opportunity and what you can do within an opportunity or even a contact is filter based on labels... so, that again, I may not answer your question directly, but this is something else that you kinda maybe use.

SIMON

1:04:10 Classify them that would be.

JOURDON

1:04:12 Class, this is one, we had some classification.

CLINT

1:04:15 And then you can make those up, right? Jordan.

JOURDON

1:04:18 Yeah, you can make...

CLINT

1:04:18 Them up. Yep. So that's gonna cover you right there, Simon. So if you can name these or whatever and you can put whatever color code next to it. But like you said, you can have whatever your sop internally are to say, hey, we're going to have five different levels of customers or three or whatever. And across the board, you name the top guys, whatever you wanna call them, the middle guys, and then the low end guys.

--- *Recurring maintenance* ---

CLINT

1:04:42 And then like you said, you can go in and filter those contacts. And then once you filter those particular contacts by labels, then you would be able to go in and search and look at all the different notes on each one of these contacts that may be said, hey, on the particular contact, they said call in June or whatever of next year, that type of thing within those two, you can even set up activities and add reminders.

--- *Recurring maintenance ends* ---

KRISTOPHER

1:05:07 Yeah.

CLINT

1:05:07 On top of that, just like a normal CRM would do. So, you understand that, Chris, so, yeah, but I think that labels is exactly what you would be looking for because then you can name them whatever, and then you guys set whatever parameters or whatever guard rails you want, to, what customers go into those particular labels?

SIMON

1:05:27 Assuming that label is visible, like if I was to look up the contact by name and see their sheet, that label, yeah.

CLINT

1:05:34 Correct.

SIMON

1:05:34 Yeah, that's perfect. Yeah... yeah, because, it's always just a function of like Chris has got all kinds of information on these people. But what happens if some of the rest of us have to interact with them?

KRISTOPHER

1:05:45 Yeah, yeah.

CLINT

1:05:46 Sorry about that noise. My neighbor's Gartner, sounds like he's cutting my house down?

KRISTOPHER

1:05:53 Here.

CLINT

1:05:54 Just came out of nowhere. So good. You guys need any more information as far as any of this. Does all this make sense for you?

SIMON

1:06:04 Yeah. My, I hopefully final question is just pricing model is Northboundary, is that something like if we added, it would be available to all users or do we have, is it like?

--- Pricing ---

CLINT

1:06:16 It's gonna be per user? And so that's why I was asking you when you wanted me to get some pricing together and I know you said, the...

KRISTOPHER

1:06:22 Yeah.

CLINT

1:06:23 So...

KRISTOPHER

1:06:24 Yeah, if that's the case?

JACK

1:06:27 I...

KRISTOPHER

1:06:27 Think for now we'd be safe to, yeah, three people I think, would be fine. I can't yeah, just do three for now and...

--- Pricing ends ---

SIMON

1:06:37 Yeah, I would almost be inclined to say six, Chris for the SDS just because they have so many inbound calls just having.

KRISTOPHER

1:06:44 So that maybe one of their processes would be to input it in there as well?

SIMON

1:06:49 Either either input it, you know, add information as like contacts made, or, okay, look up a pro.

KRISTOPHER

1:06:57 Okay. Yeah. Two, six then.

CLINT

1:07:00 Yeah, that's what I already have on that pricing that's what me and Simon were texting back and forth and just wanted to see where you guys were at on that. So you already have that in that pricing. What else was I gonna say? Yeah, I think, the next step that we need to do Simon is just find some time for the purchasing and inventory side of things to run through that product. And so I'll just either e-mail you or call you or whatever to try to find a time maybe next week or something?

SIMON

1:07:29 Yeah, that was a little more complex because I want to bring Kevin, Rob in on that, right?

CLINT

1:07:34 Yeah. And so, just to give you an idea, I'll be flying or I'll be traveling the sixth and the seventh, which is Wednesday and Thursday. So Monday, Tuesday or Friday should be able to work. So, just start looking at your teams calendars around that time, but I'll shoot you an e-mail just to throw out and see if I see some times for our, for Adam to get on board. Awesome. Yeah. Nice. Good. Well, thank you so much. I appreciate your time.

SIMON

1:07:58 They...

CLINT

1:07:58 Keep today. Always. Great to see you again.

KRISTOPHER

1:08:01 Thanks, Clint. Thanks Jordan. I appreciate it.

CLINT

1:08:04 Yeah, you guys have a great day. Talk to you bye.

KRISTOPHER

1:08:06 Take care. Bye bye.

The End