



NorthBoundary Demo with Owens Companies Inc

Michael Menolascino with Owens Companies Inc
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Participants

SERVICE TRADE

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SDR

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OWENS COMPANIES INC

Julie Kirby
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OTHER

Rolland

Jacob O'Brien

Rick Aizpuru

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Transcript

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--- Call Setup ---

JULIE

0:00 Hi.

MICHAEL

0:00 Hi. How are you doing today?

JULIE

0:02 I'm good. Thanks. How are you?

MICHAEL

0:04 Good. I hope you don't have to wait long for me to admit you, our Zoom just switched that. I have to like admit everyone individually now and I'm not used to it and I've been sitting here and I was like, well, shoot there's someone waiting. So, I apologize if you had to wait long.

JULIE

0:17 No, not at all.

MICHAEL

0:19 Okay, good. I'm still adjusting to the change.

JULIE

0:23 You...

MICHAEL

0:23 To be, people could just get it now. I'm sitting here and it's like admit shoot.

JULIE

0:27 Right. That's I just got off a Zoom and the same thing I was like with everybody and I'm like no look at all.

MICHAEL

0:32 Yeah, it caught me a couple of times this week and you think I would have figured it out by now, but, you know, years of not hitting it and you just, you develop the habit, right? Like I'm just waiting and then I'm like no one's here what's going on.

JULIE

0:45 So...

MICHAEL

0:46 Good to meet you, Julie. And it looks like we got Jacob and is that Rick?

JULIE

0:50 As well? Do you?

JACOB

0:52 Correct. How are we doing?

MICHAEL

0:54 Good. How, how are you doing today?

JACOB

0:56 I can get my bad forgot as an auto, give you the video here. Here we go.

MICHAEL

1:01 Background you've got there, Julie, what castle is that?

JULIE

1:05 That's in scotland.

MICHAEL

1:07 Okay. That's very cool.

JULIE

1:08 It's the most photographed castle in the world is what I've been told, but we were there, in may. Yeah. Okay.

MICHAEL

1:20 Very cool. Well, it's good to meet everyone today. I'm Mike Messina just to give you some background.

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MICHAEL

1:27 I, or who I am. I'm the territory manager here at service trade for what I call the midwest territory, but it's balloon to include everything from like Kentucky to Minneapolis. So basically the middle of the country, the entire middle of the country. So, so it's good to meet all of you. I know I just mentioned I'm with service trade Northboundary as a product we offer so that, that's what we'll be focusing on today, but maybe we could just go around the horn and, you know, let me know what your priorities are or what your role is and what you're concerned about? What do you want to learn about today? So.

JACOB

2:06 Say that again?

MICHAEL

2:07 I'll start with you.

JACOB

2:09 Yeah. So I mean, not too sure really about the product. We've kinda been doing service contracts. We'll call it an old school way, you know, very manual, very enter everything by hand kinda really go through it and do it. So, I'm just kinda curious on, you know, what this, you know, compares to it, how easy they can make the process, what the tools can offer. And yeah, kinda seeing what we got from there.

MICHAEL

2:37 I did a deep brief before this call, you know, to go over the notes earlier today and it sounds like right now you guys are just kinda using like word documents and templates and kind of putting things together that way. Is that accurate?

JACOB

2:49 Yeah, excel word document, you know, and then just kinda put something together based off that.

MICHAEL

2:55 And Jacob, are you primarily the person doing those contracts? Is there a team of people that are making them? What does that look like?

JACOB

2:59 Me and Rick are now getting more heavily trained into this. We have had very limited experience in it before. The person who is primarily doing our service contracts has recently retired. So there's a gap and that's where we're kinda coming in with this now.

MICHAEL

3:14 We talk about service contracts. We're talking about like things like PM agreements.

3:17 Exactly. Yeah, provided maintenance and service agreements, all that.

MICHAEL

3:22 Perfect. And just with the process as it is today, you know, it's old school. As you said, is it working for you? Where do you see areas sufficient? What, what are your thoughts?

RICKAIZPURU

3:34 Moderately. Well, like we're pretty used to it at this point. So, I mean, yeah, it works, we get done. But yeah, anything to really facilitate the process is going to be helpful. And since we're already like transitioning into this newer area of sales, I guess like any kind of help would be great thing to make it easier just because like sounds like there's a lot more financial stuff involved now that's probably gonna have projections and that kind of thing. So I just wanna make sure that I'm like well equipped for questions and that kind of thing.

MICHAEL

4:07 Yeah. So so just so that you guys both know, before we dive into this and we'll look at the system live today and we'll actually go through making a proposal. But the focus of this tool is how to make it more efficient to create these proposals. So rather than having to sit in an excel document and calculate everything out and then look up how many hours do I need for this type of asset and things like that, it's to streamline that. So it gathers all that information, does a lot of those calculations in one place which then feed directly into your proposal templates which also are then directly informing all of your opportunities. So someone like Julie can have oversight and see what does our pipeline look like? What deals do we have out there? Or, hey, we have 48 PM agreements that we're trying to sell. Rick and Jacob are killing it right now. We don't have the bandwidth for the text for that, right? Like if we get all these, what does that mean for us? So it's a combination of a CRM and a proposal generation tool. As a CRM. It's a CRM, you know, you could log your calls, log, your activities, track your opportunities. Every CRM in the world offers you that, right? But what makes Northboundary unique is that it's built specifically for mechanical contractors to build project proposals, and VM agreements, and servers agreements, right? It's how do I make these agreements quickly and efficiently? And, the other customers, you know, I've brought on with this that I was actually with a sales guy who begged his team to buy this for him when I, when we first acquired it and I was talking to him and he's like man, it just saves me time. It lets me sell more, right? I don't have to spend as much time on the administrative side. And I get focus on going, try to close deals, right? And that's the goal here. And I'm hoping to illustrate that for you guys today. So, and then Julie, what are your top priorities come coming out of today?

--- Call Setup ---

JULIE

5:58 I just would like to learn more about the tools so that they can sell more.

MICHAEL

6:04 Sell more is the goal, right? So, perfect. And now, my understanding is you guys, were recently you're part of a Ryan or Eric or what does that structure look like?

JULIE

6:13 Yes. So, Ryan, yup.

MICHAEL

6:15 Okay. So I had signed up Merrick, you know, another Ryan company?

JULIE

6:19 Yeah.

MICHAEL

6:20 Back in July. So they're using this now. So... so let me get my screen share going. I apologize guys. I'm in a parking lot in Indianapolis. So I'm juggling on one monitor instead of my usual two. So I was trying to make it back and traffic. I don't know what happened.

--- Call Setup ends ---

JULIE

6:39 So.

MICHAEL

6:42 Let me just move this. So just some background, you know, we did introductions. We talked a little about your goals. What I'm gonna do is give you guys kind of an overview of who is service trade just? And where does Northboundary fit within our world? Just so you understand, because I've got service trade slides and then we're talking about Northboundary. What does this mean? And then we'll dive right into Northboundary and actually look through it. And then we can set up time if there's anything more specific you wanna look at. So service trade is as a business. We were founded about 12 years ago specifically as a tool for field service management for mechanical and fire protection contractors. I know you guys are using build apps. So think of it as a similar tool to something like build apps. And we've been in this space for a long time and we made a conscious decision to stick specifically to mechanical contractors and fire protection contractors that's our world. We didn't want to go into like there's other field service things. Either we want to deal with pest control or, you know, whatever it might be. But we said, no, we're gonna stay in our wheelhouse and we had everything from we have a customer through invoicing. But what we realized was there was a gap on that bringing on new customers thing and we encountered a product called Northboundary, that was just better than any other tool we saw on the market. And so we acquired them about a year ago. Now, the reason I give you this background is to highlight that while we acquired Northboundary, we are keeping it as a distinct product. So you could sign up with Northboundary, keep using build apps that's fine. Right there's no six months from now. Hey, if you don't get service trade, it's turned, you know, none of that, right? It's a separate standalone product. A lot of our customers are just service rate, a lot are Northboundary, some have both. But the idea here is that you use the, you know, you

guys are interested in Northboundary, you would use Northboundary even though it's a service trade product. There's nothing stopping you from, you know, nothing forcing you to switch to service rate. I will say that we are building more and more connection points between Northboundary and service trade to feed data directly just because they're both our products, but they are distinct products. And so today, we're just gonna look at the Northboundary piece. So as I mentioned, when we talk about Northboundary, we have these tools for obvious coordination and tech productivity and customer communication, and all these things. We have nothing for winning those new customers initially. How do you get them on board initially? And so that's where Northboundary comes in. So, let's just take a look directly at Northboundary so, are you guys able to see this? It looks like Rolan joined us. Sorry guys... as role, another member of the team.

JULIE

9:19 Yes.

MICHAEL

9:19 Yes, perfect. Perfect. I'm admitting now, so it looks like he's joining... perfect. So what you're seeing on my screen is what you would see when you log in to Northboundary, so we are in a live Northboundary account right now. I say live, it's a demo account, right? So it's got a bunch of fake data, but it's a functioning account that we're going to build a proposal in. So when I log into Northboundary, as say a manager or a sales person, the first thing I see is my dashboard and like any CRM, my dashboard is gonna show me, you know, what is my pipeline look like? I could look at it for a specific seller, the team, as a whole, whatever it may be and kinda get a feel for what's going on. You know, what deals do I have out there? What's open? What stages are they in? And it's got all you're expected. Let's call them CRM capabilities. So we take a look here. We've got our opportunities by stage. I can move things through stages really cleanly and easily directly here. And you could filter that down to look at specific deals that you wanna see or certain segments and change your views to, you know, if you prefer more of a grid view, rather than this sort of interactive view, you can do all that right here. Additionally, when we take a look, let's just look at this cost or T retrofit that someone's got going like you would expect you could log calls, you could add tasks, you know, if you need to remind yourself to follow up with this guy next Tuesday, add a task to follow up on Tuesday. This type of stuff should probably be familiar to you guys, right? You know, if you've seen this in CRM, it's nothing. It's nothing unique, right? So where this starts standing out is the PM agreements, and project agreements that weren't able to build with this tool. So let's dive in and actually build an agreement together.

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MICHAEL

11:02 So let's say, I'm doing a new PM agreement, right? I'm signing up a new customer for a maintenance agreement. I could come right in here and I'm just gonna start by creating a new one and we will call this... let's call it MM task. So people know it's mine and don't mess with it while we're going through this. The one downside to these share demo go, sometimes you're in one and someone else starts moving around like I just moved around someone else's between stages is that gonna go so... and we'll just say, and, I could set my different market types however I'd like. But in this case, I'm doing an industrial building and I'm gonna set it to one shift and you'll see that then says, okay, so it's probably got about 250 monthly operating

hours because it gives me an idea of what that is. Whereas if I said no, no, they're running three shifts, they're running 24 seven, right? It's more like 750 operating hours. So it kind of feeds that in for me to make it help calculate this for me. I'm gonna use my standard pricing factors and if I want, I could put in, you know, it's about 20 Miles from our office to this location. This becomes a, not more relevant when you start going really far, right? You need to go, hey, we can't just do a 50 dollar gip trip charge. We need to cover the mileage cost to make sure we've got our margins here. And I'll just say that the average install here is 2015 and then I can select a customer that if it's a, you know, if it's a prospect or an account. If it's any record that already exists in here, I, you select customer or I could hit new customer. And right from here, create a brand new customer. So you don't have to as a seller. One of the things I appreciate is I don't have to bounce around. I don't have to go back and create the account to then create the proposal. I can do it all from right here. So we'll just select there's one that I always use this one, one two, a east front street. And you'll see that then gives me a drop down of the contacts for, that account that we have in the system. And I say great. It's Bill Smith that I'm making this for this making sense so far. So I hit save. Now, the first thing I want to show you here. And I'm just gonna jump over to opportunities and show you something by starting the proposal, this automatically creates an opportunity. So you as sellers don't have to worry about, did I create an opportunity? Did I put it in the right? Say it happens, I started a proposal, it starts an opportunity for me in the very first stage. So now I need to start adding assets, right? We're now on the asset step of this proposal because I can't do a maintenance agreement without adding some assets to this.

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MICHAEL

13:38 Now there's a variety of ways I could do that. I could individually add assets. So I can sit here and say, you know, what? We're going to grab one of these. It shows me a picture and I go, yep that was, that's an example of what I was looking in, right? Add that in, I can even do something like a model look up, right? So if, for example, I've used this asset type before, like let's just say I know, this is a eight zero zero zero one by training. And I can see here that I've used that asset before in a different job. And so I already went and got the filter information and the belt information. If we take a look here, it then populates those filters and belts... that I need. And so that builds as you use this more and more as you do more and more proposals, it sort of builds your asset library for you so that it makes it quicker every time you do this. So I can manually add assets, but that's not always ideal when I'm out in the field, right? If you're out in the field, your onsite, well, that's why we have a phone app that is just for surveys. It's just an asset survey tool. So you could be out there in the field, walk around C, the asset, take a quick picture. So I actually did a, I have a survey in here. It's my example PM job. So we'll just grab this survey that I did previously on the phone and import it. And now you'll see it captured these other units. I'm gonna rename this one just because I already created a unit one... but you'll see it then pulled in these additional units that I captured. Now, when I take a look at, for example, which is the one I want to do. This one is make three just to keep myself saying when I look at this unit, for example, I took a picture of it because taking a picture of.

JACOB

15:22 I'm...

MICHAEL

15:22 Gonna switch over to a grid view and look at these assets in a grid view because I personally find that to be clean. I take a look and I go, great here. I have a picture of this asset. I can even do something. I can hit this process image button because you'll see when I did the survey, I just captured what it was very basic information and then took a photo of the tag. I hit process image. It reads all the information. And now I can say, great, I can either use auto fill to fill in the model, serial number and manufacturer, or I could click on any given field that like to copy it and then say, yep, that was this one right here. So again auto fill or just paste it in there. You could do it either way. But it allows you when you're doing your asset survey to do it a little more quickly, right? To just walkthrough mark, what type of asset it is. Take a picture of the tag and then fill in the details later. How do you guys do your asset surveys right now? If you're building a maintenance agreement and you've got 13 rooftop units, a chiller, a boiler, what does that process like for you today?

JACOB

16:28 So manual,, map, mark and tag?

MICHAEL

16:32 Okay. So this is again, let me just do this for you real quick. I've got the app on my phone. I'm fairly certain.

MICHAEL

16:49 I'm gonna switch my screen share to my phone just for a moment so you can see what this looks like.

MICHAEL

17:02 Are you able to see my phone screen right here? Yep. So for example, if I'm going to start a new job, I'm gonna simply hit add job and I could put in the, you know, the job name, customer name, whatever the information is similar to what we did a second ago, you know, but I've got one started. So I'm just gonna use the one I have right here. Great. I like this and I want to go through and take a look at these assets. I just could add asset and I could select the type of asset that I'm looking for and I could, you know, select the asset type, put in the different information, all of that. And then I just upload this when I'm done. And so you don't if you don't have sales service because as we all know, often, you're in a basement, you know, somewhere in the utility room, you're in a basement, you don't have signal, it's fine. You add all the assets right here from your device. And when you're done, did my screen share freeze up? I did, I apologize. Hold on. I think it was, it looked like it was frozen on the list of... assets. But once I've added my assets, I then just simply, once I have a signal, I hit upload and it's going to upload that asset list so that I could import it into a job. That makes sense?

RICKAIZPURU

18:12 Yep. Exactly.

MICHAEL

18:14 Does that seem easier than your current process?

18:17 Yes.

MICHAEL

18:18 Okay.

RICKAIZPURU

18:18 It's pretty.

MICHAEL

18:19 Yeah, I mean, and that's the goal here is to make your life quicker and easier. So let's go back to, and that app is very straightforward. It's there to do asset surveys. It's the survey manager tool. I can get my screen shared back to my desktop. So now we're back in this and I can see my various assets again. I can also while I'm taking a look at this, I can say, for example, maybe this customer says, hey, you know what? On unit one, I really only want you guys to do spring and fall. Is it no winter? I'm trying to save money. Great. And I could just make that adjustment right here and change that. And I can even say, for example, hey, I know for a coil cleaning, I could just use it in a prentise or a helper for that. I don't need a full tech. So I just change the labor class there. So I can make those changes, fill that in that you could even go even further. You could put in like unit condition grades. You could track, you know, how that's going to appreciate over time, give your customers visibility into that. But once I say, you know, what this all looks good to me. I've got the assets we're using in here. Let's go over to pricing. So I just click over to pricing. And what you'll see is we actually pull in the hours in time expected for each individual unit based on manufacturing recommendations in the industry best practices, and so on. We have a database built of how much time is used for each unit in each visit for each season, as well as time for filter changes, belt changes. These two don't have it because I didn't put any filters or belts. It's also why it takes far less time because I said that these units don't have filters or belts. So guys, what needs last time? Because there's very little I could do on that PM job without that. I can see the type of labor I need here's. That helper labor, the apprentice labor they put in there. I can set this up and say, you know what? I know this is going to be four trips.

--- Pricing ---

MICHAEL

20:17 I can set this as a cost per mile rate or a trip charge depending on how you prefer to do it. You'll see it calculates out my material costs, my labor costs, all of this information. And then you could have different plans. Do you guys currently offer, you know, any sort of full labor coverage or full coverage plans or is it just maintenance agreements? Like what are the different levels you offer to?

JACOB

20:36 We don't offer any full labor now.

MICHAEL

JACOB

20:40 We have one account that has full name, one left. Okay. We call the pay accounts, but no longer.

MICHAEL

20:47 Okay, perfect. So then you don't need to, you know, you would just have the programs you'd like to offer. You could customize any custom programs, whatever it might be. It's then going to calculate out the prices for me automatically. Now, right here, it looks like a PM agreement here is coming out to 1,444. Now I talk to this customer and he doesn't want to pay more than 1,200. So I could write here and override this to 1,200 and see that takes my margin down to 30 percent. Now, unfortunately, Julie told me I had to keep my margin above 35 percent. So I'm gonna switch that to 35 and you'll see it automatically updates the price. So this is all happening in real time. So it's similar to using excel spreadsheet to calculate this, but it's all built into our tables. So it's consistent. You're updating in one place. You don't have to worry about, do I have the latest copy of this document or did someone modify it or whatever it might be? It's all right here, calculates it out for me. And once I say, you know, what this looks good, this I'm gonna run with, I can go over to the proposal. I should probably save my changes since I did an override. I'm gonna go over to my proposal. Now, my proposal, I could add a cover picture to my proposal, table of contents, that type of stuff. But let's go down to the actual agreement. And I'm gonna look at this agreement and I'm gonna say, I wanna do plan maintenance again. If we had different types of agreement of maintenance agreements, I could select the appropriate one like our artwork special or whatever it might be. But I'll do my plan maintenance and I'm actually going to have them pay me. I could have them pay me monthly quarterly annual. In this case, I'm gonna say annual small enough let's make it an annual.

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MICHAEL

22:20 And you'll see it just updates all this automatically for me. And now I'm gonna hit save and this is another step where I find that as a seller, I appreciate it because I hit save and you'll see what it did is it automatically advanced my opportunity from that opportunity stage to the second stage? Hey, I'm at I'm beyond just looking at their assets, doing a survey. I've I'm here, ready to send out a proposal. So I'm gonna advance it and we could name these stages as you'd like, right? And so right here, it moves it forward. I can update any other fields that the team wants me updating. We can have custom fields, things like that. But I say no, looks good, save it. And now I wanna turn this into a proposal. So I'm gonna hit print proposal. Now, I could just send this digitally for E signature that's what the E sign buttons for. But for today's purposes, we're gonna just print a proposal so we could visually see what this looks like. Now, the first thing you'll see is because I selected plan maintenance, it then selected the appropriate supplementary documentation for this proposal type. Whereas if I was doing a, you know, Installation project or a new Construction or whatever it might be, that's gonna need different supplementary content than a maintenance agreement. And so it, by selecting plan maintenance, it selects the appropriate content from your proposal templates. So we'll kind of merge all your documents into this. I'll hit print. So we can take a look at what this looks like. This just has our, you know, generic fake company are service documentation here here's.

The proposal number pulls in my name in the system is NB demo. So, but my contact info, all that information you might want, gives me a table of contents and overview of what's in here. If I have like a cover letter and introduction. In this case, there's an overview of what the PM program includes, and what we're doing there's an ROI document here explaining some information from the US department of energy and the value of a maintenance agreement and keeping your assets to tiptop shape so that you extend the life and reduce costs. Then there's a summary of the tasking that we do associated with this agreement. And then we actually have the actual agreement. And what you'll see here is it just pulls the data of how much they owe, when, what frequency term length, all that directly from the other stop there's no copying from your spreadsheet. There's. Now, did I, you know, transpose two digits or anything like that? It makes it a lot quicker and cleaner. And then it's got my terms and conditions. Again, whatever it is. I'd like in here, we've got a inventory of equipment. We've got the air filter services, whatever we have it's got it all right here. Including pictures I might have taken. And again, these are all defined by your proposal choices, right? We have some stock content in here and you guys can say now we like these templates that we use and we blend those right into it for you. And then like I said, once I like it, I could print proposal. And then I could just send it out for an signature to whomever, it needs to go to and then they'll receive that for a signature. So that's, the process for creating a maintenance agreement. As an example. Similarly, if I have a project proposal I need to do, I can similarly start building one. I think this one Alex spell, please better, whatever this is, someone started one here, but you could see, you could build out the worksheets and see your summaries. And again, it's a tool to guide you straight through from that into a proposal that again is going to select the appropriate pages based on the type of proposal, to streamline this and sort of make your life easier. The other thing that's happening here is as I mentioned, as we created, it created MM task over here. As I sent that proposal, it moved over to here. And then, you know, when I win it, it's going to go over to sold or to lost if I lost it. But you guys never lose deals so that you don't have to worry about that. And then even once they've signed up, we could even have a job planner here. So let's just take a look at this one two three office complex. So, for example, here's, a series of steps we have to do after we get that contract signed, I have to move it over, you know, sales manager signs off reviews, make sure that it was properly signed. Goes to the service manager, just start scheduling, goes there to start entering into the build out system, maybe, or the operation, his team to start scheduling or to finance or whatever it might be. You can create these steps, these processes you want things to follow. Once a deal is one and you enter it into that process. And again, you have a variety of different views. You can look at where people could check off what they've done. You could mark who owns a given step and keep tracking, make sure that the post sales steps have occurred, right? Not just getting the contract done, but did our team enter it into our accounting system? Did it get entered into build apps and track that way? And you could have those various steps right in here if you'd like. And then again, you have exactly as you'd expect all the reporting capabilities. So I can say, I want a report of let's just do a bookings report. I wanna know, you know, what have we booked it over? You know, year to date or I wanna look at a specific team or seller, year to date. I can look for example at an opportunity report and say, I wanna know what deals we have that. Our market is a greater than 60 percent chance to close in the next 90 days. I want to report of that. So I know what kind of demand we're going to have, right? Similarly when I come over here, let's go back to that MM test agreement. If I come over here into planning as I'm making this proposal, I can see... exactly how many hours I'm gonna need seasonally as well as the organizations total PM demand and what we're looking at here. So if your team comes to you and says guys, I need to start scheduling those PMS for March for the spring visit because we can't fit anymore in April. We're overloaded on April, get your customers to agree to a March visit for

spring just as an example, if you know, if you could. So you can kinda see what that demand structure looks like across the org as well as you're planning these out. What are your thoughts?

RICKAIZPURU

28:44 I just don't know it's very, it looks like it's a very good software like this would be awesome. But I don't know how it's gonna plan if we have like BuildOps and we're like creating multiple things.

MICHAEL

28:56 So the idea would be similar to if you had service trade. So the idea would be that you, the sellers get this all sold proposals done, signed off in here. And then you're gonna have your service teams actually manage it from your service software. Now, the advantage service trade is it's automatically feeding all the data directly over rather than having to like, you know, export it and load it in, you know, with ServiceTrade flow smoothly. But with BuildOps, you're still on, be able to take that export, load it right into to their system. It's got that manual step. And again, that's why you kind of probably want to add a step, you know, that tracks, did someone load it right? So you can mark that it's been done? And you can see that that's been completed. But yeah, that's it's not uncommon, right? For, for folks and you could talk to like the merit team because I know they're on build apps as well and see how that's going on their side. I'd be curious how they're finding that experience actually. But yeah, they're doing that same structure from here into build apps.

RICKAIZPURU

30:00 Yeah, it's really cool though. That's a pretty amazing program there.

MICHAEL

30:04 We, we acquired this company specifically because we were like, my goodness, this is a really cool piece of software and the company was run by the founder and creator of the product. Like guy built this himself. He had a team of a couple of people and we're like shoot, what can we do with this with even more resources to throw at it, right? You know, this guy built this. I mean, he's got 20 years, 30, 40 years of experience in the industry, and that's why I had all the data that we needed, but it was really helpful to get it built out that way. Julie. What are your thoughts? And we might have lost Julie?

JULIE

30:43 I'm here. Sorry?

MICHAEL

30:44 No worries.

JULIE

30:46 Yeah, no, any, you know, any software efficiency is exactly what we need.

MICHAEL

30:51 Yeah. So the idea here is, again, like I said, it's wait, did Rolland?

JULIE

30:57 Just lost Rolland? I wasn't gonna say he, I just...

MICHAEL

30:59 I just reentered him. Sorry about that.

JULIE

31:03 Be...

MICHAEL

31:04 But yeah, if the idea here is to streamline, save you guys, some time, make your life easy and then give your management team that easy visibility into what's going on without having to be breathing down your neck. If Julie wants to know what's in the pipeline, Julie, you could even do something just as an example.

--- Pricing ---

MICHAEL

31:20 You could even schedule these reports to just hit your inbox. So that, hey, I wanna schedule a report as just an example for a specific team. And I want to see, you know, what do we have that we anticipate to win in the next 90 days or 30 days or whatever it might be. I want that to hit my inbox every, you know, week or every month or maybe every Friday morning. You want a bookings report of what's gone through or you can always come in here and look directly. And if you need to go, hey, did we ever follow up on that MM test deal? Well, I could see if, you know, we've got upcoming tasks and notes like that as well. So.

JACOB

32:02 Michael, I got a couple of questions for you. I didn't catch your name, Donald, do I, yeah, one of my questions as you mentioned that there is someone that's on the Astor team that is using the product that also has build up. Who is that company?

MICHAEL

32:22 Merrick, they're in a Ryan group company?

JACOB

32:26 Eric is using?

MICHAEL

32:26 Merrick signed up with Northboundary in about July. They probably, I know they, I think they were kinda getting it stood up in August. So they, they've probably been live a couple of months at this point with Northboundary and I know because they're Ryan group, they were also getting pushed on to build apps.

JACOB

32:45 Okay. And then, do you have any other local contractors here in town? In other words, in any other mechanical guys here that we would know of that are also using your product?

MICHAEL

33:00 I'm blanking off hand. Where are you guys headquartered? Where are, where are you personally?

JACOB

33:03 Minneapolis?

MICHAEL

33:04 Minneapolis. I'm trying to think mcombs is in, I can look, so Jacob, I'll be honest, I don't know every Northboundary customer just because we acquired it last year. So, I only know the ones I've signed up this year, which is be Iowa and Michigan and Indiana so far, but I'll look and see who we've got in the Minneapolis area. I'm sure we've got some folks.

JACOB

33:26 Okay. I was this car?

MICHAEL

33:27 Yeah. For service trade, we have plenty of customers up there for Northboundary, I'm sure. We have some, I just don't offhand know. I only know the ones that signed up in the last, you know, six months.

JACOB

33:36 Okay.

MICHAEL

33:38 Yeah, but I'll get that info over to you.

JACOB

33:41 Thank you.

MICHAEL

33:42 Yep. And then just so that everyone, you know, so we're transparent on pricing on this because it's that's pretty straightforward too. We only charge for sales users. So, Rick and Jacob, if you are the two guys making agreements, you are the two licenses that are paid. Well, we have a minimum of three licenses there'd. Be three paid licenses. The rest of the team people that are, even if they're doing an asset survey or they're just reviewing agreements or approving them, whatever it might be. Those are all unpaid. We only charge for the seller licenses, minimum of three and

they're 1,200 dollars a year. So, if you guys wanted a three license agreement, it's 3,600 dollars out the door. Well, tax.

JACOB

34:21 Okay.

MICHAEL

34:22 Yeah. And then there's for the first year, there's a setup fee. I don't remember the exact amount. I think about 2000 dollars, 1,500 dollars, but that's first year only. And then it's just your three, 3,000 or 3,600 a year. I'll send you guys, the detailed right up there. But we try to keep it simple. There's that implementation in setup and then just a flat rate per license minimum three only for sellers. All other licenses are uncharged. And that's because we want to encourage you to have the rest of the team in here. We want as much as your team in here, looking at what's going on, what the pipeline looks like, what's forecasted, you know, updating templates, if they wanna make adjustments, you know, we want to give your team that visibility and we don't want to charge you for it. So.

JULIE

35:06 Good. Hey, that's good.

MICHAEL

35:08 So we try to keep it manageable even with our core product, the service rate, core product, you know, the equivalent to build apps. We charge for technician licenses there because that's you know, the key user. And then everyone else is free. In this case, sales are the key users. So we charge the sales licenses and others are free. So.

--- Pricing ends ---

MICHAEL

35:29 Other questions from the group?

JULIE

35:35 Not for me.

MICHAEL

35:36 I went pretty quick there. So what I'm gonna do is I'm gonna put together some content for you. Don, I'll figure out who we've got, in the Minnesota area and send that over after this. I'll kinda look through a report and see who all we have up there. Check with the ams. Let you guys know that I'm also gonna send you, we have a little tool that is call it like a interactive guided tour of this so you can revisit, you know, and play with some of the things yourselves hands on. So I'll send you a link for that as well. And then I'll send you just a summary of pricing for you have. So you have that and I'll be honest. It's not uncommon that we get off one of these calls and three hours later you thinking about it and you go, I should have asked whatever it may be. Please don't hesitate to reach out, call, e-mail, me, whatever it may be. I'm glad to

answer all those other questions that inevitably come up as you think about it. So anything else I can do for you guys right now?

JACOB

36:34 No, thanks. So.

MICHAEL

36:36 Okay. I will get, I will get all that follow up.

--- *Wrap-up* ---

MICHAEL

36:38 I'm gonna, I might have to talk to you an am, so I'll get all that follow up to you by tomorrow morning at the absolute latest... you know, depending on how quickly I can figure out the Minnesota situation. And then, Julie, is it okay if I just send you an e-mail or give you a call Monday and just check in and see if there's a follow up questions at that point?

JULIE

36:55 Sure that'll be fine.

MICHAEL

36:57 Perfect. Well, it was great meeting everyone. Thank you for your time today.

JULIE

37:02 Yes, thank you. This was.

MICHAEL

37:04 And...

JACOB

37:05 I...

MICHAEL

37:05 I should know. I know you guys are all Ryan, but if you don't personally know the guys at Merrick, I'm glad to make an introduction there as well. So, if you'd like to speak with them, so.

RICKAIZPURU

37:14 Hey.

JULIE

37:15 Great. Hey, thanks.

The End