ServiceTrade Demo with Houle Electric Limited

Meda Piner with Houle Electric Limited
Recorded on 3/31/23 via Zoom, 1 hour 22 min.

Participants

SERVICETRADE

Meda Piner
Territory Manager

Lauren Rice
Director of Enterprise Sales

Sean Jenkins
SDR

HOULE ELECTRIC LIMITED

Kyal Clarke
Regional Manager, Services

OTHER

David Lewis

Alex Wong

Topics

Transcript

KYAL

0:00 Hey, David, how are you doing? Not too bad. Good. It's like we're waiting on a few more to join.

DAVID

0:08 Yeah, Kyle, and I think Alex, Wan should be joining shortly.

KYAL

0:13 Okay, perfect. We can hold off until they join.

DAVID

0:16 All right, perfect.

LAUREN

3:32 Hello?

KYAL

3:36 Hey, hey, lone.

LAUREN

3:38 Is it going?

KYAL

3:40 Is going, can't complain on a Friday? Well, it's raining in town for us so we can complain.

LAUREN

3:48 You are allowed to complain. I was in los vegas yesterday and it was raining and I was not happy.

KYAL

3:57 We can't go to vegas and how it rains, it's not acceptable.

LAUREN

4:02 No, I was like what? This is the desert.

KYAL

4:05 You're still on the west coast, I think, right?

LAUREN

4:07 I am. Yeah, I'm in Huntington Beach in California.

KYAL

4:12 Well, I don't know if you remember, I think it's probably pushing two years ago. Now we last spoke.

LAUREN

4:16 Yeah, I do remember actually, which is why I said, hey, Meda, put me on this call. I know you were working with Darren back. He's sent.

KYAL

4:27 Yeah.

LAUREN

4:29 He, he's since rejoined or joined us, Stanley black and Decker. He's kinda getting back to what he did before service trade, which required less travel.

KYAL

4:41 He's...

LAUREN

4:41 Got a brood of children, but he, he's enjoying that. So I home every night.

KYAL

4:48 Yeah.

LAUREN

4:50 Yeah. Well, who else do you have there with you? Kyle?

KYAL

4:53 So, I've invited David Lewis is one of our coordinators. So, in one of our divisions, he deals with all the dispatching and scheduling and I've also invited Alex on who is our other dispatcher coordinator? Okay?

KYAL

5:15 Sorry, what was that?

LAUREN

5:16 Is that in just one branch? I saw a note from Sean who booked this meeting... about your interest in like a roll out plan.

KYAL

5:27 Yeah. So that's why I've invited David. So David is the, our quality coordinator which is just one of our smaller divisions out of our head office in Berlin in Vancouver. And so or the office team for them is four people in the office and about four or five technicians in the field. So we'd like to look into a potential sort of pilot small with that division and see how it goes. But I definitely wanted to have a bit of a refresher. I know we sorta left off with a couple of notes that I felt we're sort of a no go. At that point. Things have changed. We've you know, we've gone and looked at other software as well too. And so I kinda comfortable circle back since we last spoke. We have officially rolled out pro core as well for Construction, which does affect service as well because we do small projects. And so the company mandate is that any project doesn't matter what size it is has to be run through pro core. So, I know you guys have started dabbling a little bit in the project management side of things. That is, it's nice that it's there, but we wouldn't be using ServiceTrade for any of that. I don't know what integration we need to think about with procor, but I know that's why we initially approach you guys because procor had mentioned that you guys were sort of an official partners in the sensor, had pre existing integration. I don't know if that's changed.

LAUREN

7:15 It has not changed. I was just out of show in Phoenix and had our little pro core partner little catch on our table. So we very much still partner and integrate with pro core.

KYAL

7:30 I saw you guys Booth, but we didn't stop by at the Nika conference. We went there in.

LAUREN

7:36 Fun. I was not at that one but my coworker Matt was, how was that conference for you all? Was that a good show for you?

KYAL

7:44 Yeah, it was good. I mean, we went down there with the sole intention of looking at it's. Crazy to think that, you know, for us to travel all the way down south for convention to just look at service management software as you can do that without travelling there, but it is a bit of fun as well to use the.

LAUREN

8:01 You have to do that. I mean work gets monotonous. If you don't you know, get out and enjoy the bit. What you mentioned, you looked at other software and sorry, your initiative at Nike. What else have you looked at that you've kinda rolled out or rolled in?

KYAL

8:17 Well, when I was talking to you guys at the same time, we were looking at service trade and I think I expressed to you as well. I was having terrible response from them. It was, you know, months and months between emails. Yeah. And that never changed. And so, yeah, we, I did try to reach out to them a few times. I, something I just never ended up happening. I actually went by the Booth at the conference and voice my concerns. And only recently now I get probably hounded every two days by a phone call from their sales rep trying to get a hold of me... which is fun. So... does...

LAUREN

9:06 I...

KYAL

9:08 Know, I know we did come across one that I never heard of BuildOps while we were there is a bunch of people that left pro core.

--- *Type of work* ---

KYAL

9:21 Well, that's not how it originated. But so we ended up talking to them for a bit. We did it is a, it is a really good program. I'd say definitely in line with you guys, there's some things that they're kind of between they're kind of between you guys and service tighten there's they're just, they're new. They're young and that concerns me a little bit. They also have put a lot of focus on project management. So, one of the, one of the beauties of their software is it, it's kinda like a mini pro core with service, commercial service bolted on. The commercial service was their primary focus.

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

KYAL

10:05 And then the project management was, I'd imagine it's because they had a few people come over from pro for, with that experience. But again, the challenge for us is we wouldn't be using that project management future and that was very heavily... part of the value of what they had to offer. So it didn't make sense from that point.

LAUREN

10:33 Yeah. Yeah. I could see that it's funny because... they are newer and I think they've kinda been telling people... they do everything and they, it was interesting their choice to get into the project management considering that I think they're a pro core partner as well.

LAUREN

10:59 Real.

KYAL

11:00 Like that's the thing is I don't think they totally understood, you know, when I said you have integration, you know, they're saying yes, but they were sorta suggesting they do is they have open API.

--- Accounting integrations ---

KYAL

11:11 It was like, well, everyone, you know, most software manager, software management companies have open API for that exact reason. So that didn't clearly tell me that integration existed. It suggested that integration could exist.

LAUREN

11:30 I see. Yeah. So so that, that's good context. Thanks for sharing that. Since you're kinda back with us, what are some of the things that you're interested in reviewing today? So we can make sure to get to those?

--- Accounting integrations ends ---

KYAL

11:46 Can we just do a run through of just a typical service type call just so that David and Alex can see how, you know, receiving that request via phone or email or whatever and working it through the trading, creating it as a job and scheduling and dispatching and that kind of stuff.

--- Purchase decision ---

LAUREN

12:08 Yeah, we can do that. I'd love to hear if David and Alex are willing to speak to of like some of the problems they're having today. I'd love to kinda hear hear their insights as well if you guys would be open to that.

KYAL

12:22 Would take two hours.

LAUREN

12:25 Well, maybe they can condense it to like one point a piece. I'm pulling my phone up.

--- Accounting integrations ---

KYAL

12:32 The key thing to know is the fact that we don't have anything. So we're using a glorified calendar app for scheduling a dispatch. It's like using Google calendar, but almost even worse, Google calendar is actually pretty. It's got some pretty cool little features. But yeah, definitely David and Alex don't hesitate to say something.

DAVID

12:57 Yeah. Currently just, we don't have anything that integrates with our calendar. So we currently are using one piece of software, another piece of software, another piece of software and it just continues on. So definitely integrated with scheduling software or any. Yeah, just anything with the calendar. We have nothing right now and I know Alex can speak to that as well.

--- Accounting integrations ends ---

DAVID

13:25 So we're working off just a small schedule and software and JD or using on top of... schedule. It's been very difficult.

LAUREN

13:40 Yeah, I can imagine Alex. Did you have anything to add to that?

ALEX

13:44 No, it's probably sharing the same concerns. And yeah, I know the one thing that was kinda highlighted just a point I guess would be, you know, there's so many technicians that we have kind of on a schedule and then you to have projects and smaller projects and have all these things thrown up onto kind of a one single calendar can be a lot for even someone that's just taking a look at who's available. And then you can't really see that. So that, yeah, definitely something that eases the eyes visually then that's what, yeah, one thing we're missing amongst a whole list of things, but.

LAUREN

14:31 Something you said, Alex popped a question into my head, is there overlap between... the field texts that are doing like the service like the more reactive service versus the texts that are doing the project?

KYAL

14:49 Yeah, that's the biggest challenge is we, we've tried to sort of create lanes, but if we're slow in projects, they, they'll come and do service to fill in or vice versa. We need extra labor and projects we need to fill in. And that's where we're going to have to figure out navigating like there's just to be clear.

--- Type of work ---

KYAL

15:08 There's no changing the company and with proof to manage projects. So my concern is now time tracking, right? If we have guys balancing between projects and service, how do we handle their time tracking and making sure that it's you know, I don't know if there's a way to do this.

--- Type of work ends ---

15:29 But rather than having to log into multiple different apps. And yeah, like our guys, some of our guys are very capable, very smart, but we have some older guys who are a little bit more challenged with that kind of stuff. And I just foresee issues if that's the case.

DAVID

15:47 Another one thing just that you guys brought to mind is with our technicians, if everyone is scheduled, and we just want to find out if someone's available right now at that time or who's available. We have no vision to that. We actually have to click through everyone individually and kinda figure out... where everyone's at as well. So that's another thing that just came to mind.

LAUREN

16:15 Yeah. Like a service like an emergency calls or something?

DAVID

16:19 Yeah. Yeah. Like all of a sudden, we have an emergency call. We can't actually visually see who's available at that time. We have to go through each individual technician or look at it as a whole. It's really not easy for us to do or navigate.

LAUREN

16:34 Yeah... that must be a big time suck for you too. I mean, having to click in everything. How much time do you think you're spending on that each week?

DAVID

16:46 It depends on obviously, how many service calls or emergency calls, things like that. Alex would probably deal with that a little bit more than myself, but even for myself, when I'm looking for people, it can be anywhere from 20 to 30 minutes or an hour looking through people.

LAUREN

17:04 So.

DAVID

17:06 Just depending also we are contacting people, seeing if they're available with it is one of those things with making sure everyone's using the software, everyone is.

LAUREN

17:17 Yeah.

DAVID

17:18 And if they're not, unfortunately, it does take a little more time for us to coordinate and call out to those technicians and make sure they're actually available.

LAUREN

17:27 Yeah, I can. Yeah, that definitely sounds like a challenge. Well, I'll show you some of our scheduling views since that sounds like it'll be interesting to you. I do wanna touch on Kyle for benefit about the pro core integration. I think... I'm trying to think how I wanna approach this topic.

--- Accounting integrations ---

LAUREN

17:58 I don't think we're gonna be able to get away from having two systems for text to log in especially if they're like across departments, if they're doing projects and pro core and like service and service trade, that said the way the service trade pro core integration works is strictly time.

--- Accounting integrations ends ---

LAUREN

18:24 So the most common use case and I can send you a video that shows how it works. The most common use case for the time tracking in pro core based on work performed in service trade is if the project team has done a, is like towards the end of completing a project and they just need like a service team member to do like the commissioning or the startup of that equipment.

--- Accounting integrations ---

LAUREN

18:55 So you can basically create the work in pro core, click a button. It creates it in service trade, the text time on that last stage of the project. Once they're finished, you click a button, it goes back into pro core. So so that's how our integration works with pro core. So it is specific to time. I just don't I just don't see a way where there won't be some duplicate apps depending on what the techs are doing. I just wanna.

KYAL

19:30 We understand that. I just, I know it's been a while since I've spoken personally to anyone in procoe. But I know procor mentioned that they have, I can't remember the term for it, but they had some feature where as when I did talk to them about service trade, they said they had some feature where they can make it so that it's a single log in and you can actually use service grade or whatever their partner program is in procor. I have heard anything about that?

LAUREN

20:01 Yeah. I actually have like a three minute video where our cto is the person who actually built the integration between the two systems. Now, the video of how it works, that will kinda give you exactly what it does. Me make a quick note of that.

KYAL

20:21 Other than just looking at the basic workflow... just get a refresher.

KYAL

20:31 One of the questions that came to mind was I can't remember if we covered or talked about. So obviously you guys focus on commercial which is our primary business as well too, but we do residential or we do COD as well. So, and that's for both commercial and residential.

KYAL

20:52 So we, right now we use the square payment program. I don't know if you guys have or know of or have the ability to build integration with that. And I can't remember if we talked about or covered if you have the ability to attack as dispatch. They do.

KYAL

21:10 If it's especially COD, they do the work and can collect payment, you know, produce an invoice, collect payment on site and then it's one and done or not.

LAUREN

21:23 Yeah, I'll show you that when we go out to the field, they can create an invoice with the correct permissions and actually email that invoice to the customer... from which they, that customer can open the email and submit payment. We don't I don't know that we've integrated with square. It's I'm sure it's possible.

KYAL

21:46 Yeah, that.

LAUREN

21:48 Well, it basically, you know, what you guys are in Canada? I don't think the pay now functionality for the invoices works in Canada... we.

KYAL

22:02 Time to start looking into it.

LAUREN

22:04 Right. It has to do with like the credit card processing and our merchant doesn't go north of the border, but I can.

KYAL

22:15 It's pretty extensive the agreements and all that stuff when it comes to credit card processing, having credit card information on all that stuff?

LAUREN

22:24 Yeah. Is that, would you say that would be like a must have for you that I should look into to confirm?

KYAL

22:29 We can use square. It's just one of the channels we have a square right now. Is it separate? So it square is not even a man. It's not very good to be honest what the technician has to enter whatever it's just an open note section and they have to make sure they put whatever details they can, so that our coordinators can reconcile internally and that's a pain point because we have to it blogs us down all the time they detect hit a wrong number, they, you know, or it's just an email that comes through. So.

--- ST app contracts and pricing ---

LAUREN

23:09 Yeah.

KYAL

23:10 There's nothing that links it to the service to the job. It can get lost all the time. And even, you know, a dollar value. Sometimes they, because it's not, they're doing the calculation. They're literally writing it down on paper, putting, you know, doing the calculation and then billing the customer through the square app.

--- Invoicing ---

KYAL

23:30 And so, if they even get the amount wrong or they get the wrong tax, reconciling, the amounts can be difficult.

LAUREN

23:38 Yeah. How much, like what percentage of your service business is like same day COD?

KYAL

23:46 Alex, yeah, we do again, another thing as well too is we don't have a proper system.

--- Invoicing ends ---

KYAL

23:52 Our optics are terrible because we basically manage our service department out of our ERP system, which is not designed for, right?

LAUREN

24:02 Right. We can.

KYAL

24:03 Get, we can get the optics there's, reporting and all that stuff. But it's not, you know, I can go and pull a report and I can probably see roughly dollar value in COD.

--- Pricing ---

KYAL

24:15 It's up there. I'd say, hey, all it's probably like 25, 30 percent, you know, there's not a week that goes by that we're not doing codes.

ALEX

24:23 Yeah. I would say they would make at least five percentage of our call outs there.

LAUREN

24:29 Yeah, that's probably the upper threshold of the amount of residential that we would kinda be okay working with.

--- Type of work ---

LAUREN

24:38 I can kinda show you what that might look like and speak to the limitations. But generally, if you do, if you do more than that, we're probably not gonna be the best fit if I'm just being honest with you.

KYAL

24:54 So, it's not that percentage of residential. It's that percentage of COD. So we have commercial spaces. We don't have credit with us.

ALEX

25:04 Yeah.

KYAL

25:05 Or prefer, actually we have COD customers who are long term customers. They just prefer to be a COD account. So it's not necessarily that's the percentage of residential we do.

LAUREN

25:18 Okay.

KYAL

25:18 I'd say residential business, is it's probably in the 10 to 15 percent... is low?

ALEX

25:29 That's right?

--- *Pricing* ---

DAVID

25:31 Even lower for myself, a dark vision.

KYAL

25:35 We, we do on average, 200 service calls in our head office just for Alex and woke coordinates separate to David. We do 200 service calls a month, okay?

LAUREN

25:54 A month you?

KYAL

25:55 Said a month? Yeah, that's one one location, one division and we have eight locations.

--- *Accounting integrations* ---

LAUREN

26:04 Yeah.

LAUREN

26:08 Okay. All right. Well, I think, I know what, I think. I know what you wanna see. So I can show you that, you know, if it sounds like from what you remember and what you see today, that service trade will be a fit. We can discuss next steps from there at the end including, you know, how does this integrate with JD? E, how does this integrate with pro core? What other functionality should we explore like part?

--- *Accounting integrations ends* ---

KYAL

26:39 To clarify the initial pilot project, there's gonna be no integration. So I know it's awkward, but this is unfortunately the only way that we can move forward in a timely manner. If we don't do this, then we're waiting a year or more because we do all our own integration. So we have our own it team and right now the pro core integration, which we're doing it internally. So they're tied up with that right now and we just officially launch pro core. Procure has been going on for a while, but it officially launches company wide as of this weekend.

--- *Pricing* ---

KYAL

27:20 So they're going to be tied up, you know, doing the initial implementation and efficiencies and improvements. We're doing a phased roll out as well. So it's gonna take some time. We've got like 1,200 employees, eight locations. So it's a.

LAUREN

27:39 Yeah. Okay.

KYAL

27:40 So, the intent is with David and the team that he's part of like I said, four people in the office, but four or five texts in the field right now.

--- Pricing ends ---

KYAL

27:51 Everything. Nothing's integrated. So my thought was why don't we at least start using a tool that actually is designed for our business even if it's not integrated. It's still a 1,000,000 times better than what we're...

LAUREN

28:07 Yeah. And are you kind of envisioning it would be sort of like the proof of concept for the rest of the service business down the line?

KYAL

28:14 100 percent. And then I get the data the, you know, the efficiencies, and I'll be able to then prove what I already know to be true. But unfortunately, in a corporation like this is what I have to do.

LAUREN

28:33 Okay. Totally understood. Well, I know what to show you. So I will pull up my screen here and I'll probably have questions as we go, but I'll try to keep it pretty high level just so you can see sort of the life cycle of a work order from start to finish, some of the scheduling views, things like that. So just if you have questions as we go, don't hesitate to let me know. Yeah. Okay. So what I pulled up here, you a?

KYAL

29:08 Call custom on us, David, your special pick you and not me.

LAUREN

29:15 I did. Yeah, David, you're special. So I'm gonna start by kinda giving you a peek into our data model so you can see what that looks like.

--- Recurring maintenance ---

LAUREN

29:27 I'm wondering why the new view isn't popping up because we have done some cosmetic changes Kyle since you last looked at this. So, so things are laid out similarly but different enough that it's kinda easier to navigate a bit. But just as a refresher, because we were designed for commercial service, we do have a hierarchy of data at the top of that hierarchy would be companies which would be your Bill to each company that you service can have multiple locations, which would be your ship to, in this case, this is our location is the Fraser, sorry docs, the port of Vancouver, and then our Bill to would be the port. Of Vancouver. And then for each site or location that you're servicing, you'll certainly be able to track the assets that you're servicing there. I'm not sure if this is something important to you. All people are.

KYAL

30:28 David's team. Yes. So they do preventative maintenance equipment. So that's why we're going to pilot it with them. Because this definitely fits the Bill for their business.

--- Recurring maintenance ends ---

LAUREN

30:39 Cool... question about that. Not a ton of electrical contractors is to do plan or prevent advance. What made you guys get into?

KYAL

30:52 Well, that's why we, it's a big part of our business because we are, so it was a niche and we got in early... and in Canada or at least British columbia anyways, there are specific requirements by the municipalities for regular maintenance on like high voltage equipment and stuff like that. So we do hermography, infringe, yeah, yeah. Data logging and vault maintenance. So every building that has a high voltage vault or substation requires annual service and maintenance. So we got into that. We do have a lot of competition now, which is why we really need this so that we can prove, that, you know, we're at the front forefront of this industry.

--- Assets ---

LAUREN

31:48 Got it. Well. You can certainly track the different equipment that you service and the intervals at which you service them. So this doc, we've got an electrical panel. I'll go ahead and add a service can be like a one time repair or a recurring inspection or maintenance. And I can add a service tied to that piece of equipment.

--- Recurring maintenance ---

LAUREN

32:16 I'm just gonna say annual maintenance per, you know, Vancouver standard whatever in certain numbers of the organance. Here, you can assign a preferred tech if it's the same person that's going out to do the site. And then you can select how often the service should occur and the estimated duration, the estimated price that's

to help with like scheduling and kind of prioritization, and you can even add parts that, you know, you're gonna consume when you're out there doing this work.

--- Quote templates ---

LAUREN

32:55 So maybe we've got two hours of electrician labor and then some type of fee for diagnostics or something before I save that. Any questions about that?

KYAL

33:06 No, it's pretty straightforward.

LAUREN

33:08 Okay. Cool.

KYAL

33:09 How, how customizable is say the, you know, you have the drop down menus there for the frequency and the services, is that built in and not customizable or?

--- Recurring maintenance ---

LAUREN

33:21 So you do have the option to customize?

KYAL

33:24 Yeah.

LAUREN

33:25 So, so you can get as granular as you want. Like let's say you have to go within a five day window of, you know, based on when you last perform that service. So you can get, you can get granular down to the specific date and time or it can be a little bit more broad if you don't know... it is worth noting that you can tie a lot of this.

--- Quote templates ---

LAUREN

33:49 So if it's like the same description every time you're going out and doing this type of work, that kinda will save you time.

KYAL

33:55 That would be key like we call it can pricing. So we have services that are repetitive and packaged, which is unusual for electrical contractors.

--- Type of work ---

KYAL

34:05 But that's why. And David's team and who is division that is partner that's what they do and electrical, Alex's side of things. We not very often.

LAUREN

34:18 Yeah. You know, what's interesting since you brought up Nika earlier, you just reminded me Nika is actually gonna start a service and maintenance division of their trade organization. So that might be something to keep in your back pocket for the future.

--- Type of work ends ---

KYAL

34:39 Interesting. Yeah.

LAUREN

34:40 Sounds like it might be an initiative... to recession proof some of these, some of these project driven businesses? Yeah. Okay. Well, I just...

KYAL

34:55 We're in this is a job that we're looking at or this is a customer.

LAUREN

35:00 This is still the site. This is still the customer.

--- Assets ---

KYAL

35:03 If we had multiple jobs either historically or active, it would show in the screen under this location. Perfect. And the assets associated with it all that.

LAUREN

35:17 That's exactly right. Even things like proposals that you've sent specific to this location, problems that you've found specific to this location, even like site specific attachments, comments. So, things like maybe we have a location specific comment that all the texts that go out there need to know that the code to electrical room is one two to four.

KYAL

35:45 Yeah, on just something that it's not that big of a deal but on the deficiency side of things is that turned efficiencies set in stone or is that customizable?

--- Assets ends ---

LAUREN

35:59 I sat and sound?

KYAL

36:01 All good. What we call like a deficiency to us is typically something on a project that's been noted as something that we've missed or like a deficiency to us is something that's sort of are mistake?

LAUREN

36:17 No.

KYAL

36:17 Problem. So just doesn't resonate with us that's all. But, you know, typically I...

LAUREN

36:23 I do.

KYAL

36:24 I get where you guys are going with that. And it does happen like, you know, we'll dispatch tech the site and while they're there doing work, they will not other things that they see that needs to be addressed. I get that, that's what that is. We just refer to them like we flag that as an estimate is required or quotes required. And then we'll take their notes and pictures and information and produce a quote submitted to the customer, but that's fine. We can train ourselves to think differently, okay?

LAUREN

36:54 No worries. Great questions. Any other questions about this before I actually schedule this work?

KYAL

37:04 David, Alex.

ALEX

37:09 No, it's straightforward. And yeah, I do appreciate the way that you can leave jobs or previous visits there and all these other notes because it does help us when it even comes to knowing, you know, who the contact is, who the site contacts are, who we can send emails out to and, et cetera.

--- Recurring maintenance ---

ALEX

37:32 And it will definitely help our power quality with the preventive maintenance. And I know David, yeah, with all that actual information helps his technicians as well too.

LAUREN

37:47 Well, I'll show you just a bit. Let's actually create this work because we created the service, right? We created the annual reoccurrence of this maintenance, but from here, let's say, let's run a report that says show me all the work for this office that is due the balance of this month. You can bulk create all these work orders. I'm just gonna pick the one I...

--- Recurring maintenance ends ---

KYAL

38:17 David, you're drilling over this right now, aren't you create?

LAUREN

38:22 Yeah. There's a lot of both actions in here that are nice.

DAVID

38:25 Yeah, definitely. Nice for division and just for my team and one.

LAUREN

38:31 Yeah, I imagine the way Kyle's poking fun at that, it probably is pretty time consuming now.

--- Paper process ---

DAVID

38:39 That and just also just managing it all and just visually is like I said.

KYAL

38:46 He uses excel for this kind of like to keep track of our reoccurring. Yeah, we use excel and so he has to go through excel and put it into a calendar with reminders if we even get that far. So it's yeah, big.

--- Recurring maintenance ---

LAUREN

39:02 Well, all you have to do is select the one or ones that you want designate what type of work it is. You'll be able to see what services are due. So if you have more than one, you can put them all in the same work order. You can see scheduling notes.

--- Dispatch ---

LAUREN

39:18 I might have made a note like don't send David. They don't like him there like you can see that from the office. But maybe the text don't need to see that. Then it's

really easy to create that job and it'll show up in a couple of different scheduling views. So we have this map scheduler which I will filter here. This is better for your proactive work like the maintenance and stuff. It doesn't allow you to filter by price by area. So if you're scheduling for Bernie, you may want to just see that area if you're scheduling for I don't know if you go all the way out to Kalona, but that may be its own thing. So then you can come in here and see all the available work represented by pins on the map... based on the region that you select. It would kinda Zoom in on that area. And I can see right here at the Fraser. Sorry docs. I've got this PM that do that. I can then drag and drop to the calendar below. I already assigned myself as the preferred text. So it knows to assign it to me. But if I wanted to add another tech to that, I could do that here me to why aren't you in here? That's unusual.

--- Quote templates ---

LAUREN

40:37 I can add Brook to maybe you're in a different office. And then I could also adjust the time as necessary. So I could come in here and say we're gonna do it for this time. And what happens is that will automatically be added to my schedule as the technician.

--- Dispatch ---

LAUREN

40:55 And if it's the same day appointment, the tech will be notified in real time. Hey, there's been a change to your schedule?

KYAL

41:02 Is, is there a way I think vaguely remember... that you can move things around on the calendar before it updates to the technician you can do?

LAUREN

41:14 Yeah, that's an account setting. You can decide whether or not you want to release the jobs to the text that's probably a better view for this dispatch board. So let me show you that as well. This board is kind of accomplishes that problem that you're having today. Like we don't know who's doing what right now. If the map scheduler is better for planning your work, this is better for like reacting to work as it happens. So I can come in here and say someone's calling in from the Angus barn. My gosh. Angus barn isn't in here. Sorry, somebody went in my account and did some stuff. Let's see. We'll do I hop, we'll say it's an emergency. We'll schedule it for today. We assign the time something is wrong, diagnose... and repair. We can select the asset. If we know what it is that's broken. If not, we can just say, hey, we don't know, but we know something wrong with the electrical and then we can save that, and then that will show up as an unassigned work order that we can then drag and drop. Now, this little green dot is how you determine if it's released or not. And if we do want like again, if you can set up your account, so automatically doesn't release, but then we can drag it all over the schedule and see where it fits. And then once we kinda decide, okay, this is where we want it. You can then release that to the tech and then it'll show up on their list of appointments?

KYAL

42:59 Nice... quick question. It might be too early for this, but again, the overlap between projects and service, is there a way that we can at least show the schedule of projects on here but not, you know, they're not involved with any job costing management or anything like that, but show the schedule on here just so that we can see who's...

--- Type of work ---

LAUREN

43:26 Let me get back to you on that. I don't know how other pro core users are doing it. It's kind of unusual that all projects go through pro core since service projects tend to be less like dollar volume and less complex.

KYAL

43:44 Threshold is 2,000,000, so.

LAUREN

43:46 Contacts...

KYAL

43:48 Yeah. For service because our...

DAVID

43:52 Okay.

KYAL

43:53 Yeah. So we'll do up to 2,000,000 dollar projects.

LAUREN

43:57 Okay.

KYAL

43:58 Which is why typically a service software is not usually the best suited to projects of that size, even though a lot of them will say that they can handle it. The reality is.

LAUREN

44:09 Yeah, interesting. Okay. I'll do some research. Let me make a quick note of that question.

--- Type of work ends ---

KYAL

44:18 Know what? Yeah, what other, if there are companies that use service trade info for our business, what they would do and how that looks.

LAUREN

44:26 Yeah, I'll do some research and get back to you.

KYAL

44:29 Right.

LAUREN

44:30 Okay, great. So let me pull up this work order so you can see what it looks like.

--- Recurring maintenance ---

LAUREN

44:41 So, if this tab over here was the location or the site, this is the actual job that I'm performing at a glance. You can see, you know, who are we building? Where are we doing the work? When is it due by who all is on the work order?

--- Deficiencies ---

LAUREN

44:59 What have they done so far? So, so this will update in real time as the texts are doing things in the field, like adding parts, labor, or items clocking in and out, recording what you call is meeting estimate or what we call deficiencies, and then any additional information like comments, pictures, etcetera.

--- Access to information ---

LAUREN

45:21 So if there's no questions about the office view of this, I can show you what the technicians will actually see in the field.

KYAL

45:29 Sure.

LAUREN

45:32 All right. Here's, the tech app. So this is on my iPhone, you can use both iPhone, android devices, tablets like you kinda pick your... poison and based on whatever the text preferences or whatever you provide them, they'll be able to see their schedule and it'll look the same across all the different devices and they'll be able to click into the job there. And then it'll pull up information about the job including, you know, what services we're there to perform, what technicians are assigned to the job... what information, and we need to know about this site.

LAUREN

46:15 So there's the code to the electrical room. From there... we can start doing our work. So down here at the bottom, there are three types of clock events that the technicians can like check in and out of the job on site. That's pretty obvious what that is in route. They can clock in. If you're doing like if you're charging your customers port and you want to track that time, they can clock in and in route. So I can come in here and actually clock in and actually send a notification to the customer. This might be advantageous for your residential side because I know that's what some people are starting.

KYAL

46:57 Yeah, no, I like that. But is it, can we, just, can you choose whether you do or not?

LAUREN

47:02 Don't have to do?

KYAL

47:03 No, I like, I'd like to be able to do it but there's some customers that say the contact doesn't it is not the site contact and doesn't need to be getting that notification.

--- Tech On-site ends ---

LAUREN

47:15 Yeah, yeah, totally makes sense. Like if you're doing like for like a unit in a building or something like you're probably coordinating with the landlord but then like the individual tenant, you're probably not letting them know you're on the way. Yeah. Yeah. Okay. Makes sense. But yeah, you have the option if you want it.

--- Deficiencies ---

LAUREN

47:33 Once I'm there, I can clock in on site and then I can go about doing my work. Let's say I did find a problem. I could come to the deficiency section and add a new one and say, maybe we did, we use our flier camera and we wanna take a picture. I don't have a flier camera, so you won't see anything if I did it, but maybe we can say that one of the fuses is hot, need to address. And I don't have to be super descriptive because I can add my picture of the scan. We'll just say that's the very colorful few. And then we can actually also add things like videos. Like if you wanna walk around the room and do the recording, you can do that. You can also record an audio note. So whoever is estimating that can know, hey here's, what's wrong here's. What I recommend to fix it here's. How long I think it'll take here's, the parts and tools I think we'll need. And any other information the office needs now to quote this out... from there, I can select the severity, tie it to a specific panel or piece of equipment. And then from there, we'll say it's new it'll notify the office while I'm still there,

someone can start working on pricing all the technicians still continuing along with their maintenance. What are your thoughts on? That looks like something that would be useful?

--- Paper process ---

KYAL

49:14 Yeah, it's good.

LAUREN

49:15 Definitely.

KYAL

49:16 I don't know about for like our scanning David necessarily because it's a little bit more complicated than that for the for cameras that we use the, we have to use their software to produce a report technician. It's a timely thing. But this will still help consolidate that because we have a template that we use. It's pretty fancy and nice, everything gets filed into...

--- Customer engagement ---

LAUREN

49:45 Sure. Yeah. Well, it's there if you need it that's to be fair where most of our customers are seeing an ROI and service trade is they can kinda execute, they document and execute on more pull through work because it is easy to document those problems. So I have more specific data on that, but we don't have to.

--- Type of work ---

KYAL

50:06 Electrical side. This would be super valuable. So.

LAUREN

50:09 Yeah, that's just.

KYAL

50:10 From, from power qualities preventing started things. It still would even be useful for them. Just some of their businesses. We do full extensive reports that's from the software. So.

LAUREN

50:23 Okay. Yeah. That makes sense. That makes sense. That's similar to some of the low voltage software that's out there too are required to use that.

--- Deficiencies ---

LAUREN

50:31 Well, great. Well, I will continue along then. So I can also add attachments that aren't specific to the, to a problem. I'll just take a picture of that. It could be like before and after pictures of something that you've done like a service call or whatnot, and then from there, let's say I use parts or material in addition... to what was originally put on this.

--- Quote templates ---

LAUREN

51:03 I can come in here and say, maybe I pulled some type of wire and I can say I used X amount of this type of wire, save that and then any.

KYAL

51:17 In on that because obviously, so obviously you guys have a database of some sort that could be created with materials, labor materials, all that we... is there any way to?

--- Parts management (inventory) ---

KYAL

51:31 Because our pricing especially in electrical, our pricing changes constantly. So... we use accurate for all of our estimating and accurate uses. I think trade service or trade servers to. So we have a purchaser, a purchasing department actually that makes sure that daily our pricing is up to date. Is there anything long term that could work with ServiceTrade?

--- Accounting integrations ---

LAUREN

52:03 Your question?

KYAL

52:03 It...

LAUREN

52:04 Is you're not gonna like this, answer? Our API support integration with a lot of different things. So it's not out of the question that we could integrate with like trade servers or profit run or whatnot?

KYAL

52:16 I'm okay with that answer that's fine. As long as the option is there as... my concern is we build the database.

--- Accounting integrations ends ---

KYAL

52:24 We have pricing in there, but now I have to hire somebody dedicate one person to updating that come, right?

LAUREN

52:33 Yeah.

KYAL

52:33 It's a big job. So.

LAUREN

52:35 It is for sure. I do have a follow up question to that. Do you carry inventory at all?

KYAL

52:43 So, I am curious to know what that looks like. At some point, it's not difficult for us right now. Yes, all of our bands carry inventory. No, we do not have any sort of for management system and it's something I'm interested in. I've always been interested in all the businesses I've been involved in. However, I am very aware of while it may provide a solution or solve one problem, it kind of creates, it creates more work as well as now, we have to do now, our guys have to make sure that they're keeping track of what they're using from their vehicles.

LAUREN

53:24 Yeah.

KYAL

53:25 And, and they're that they're doing that properly. You know, we do inventory but it's very loose like right now it's our year end that's why it's super busy right now. And all of our guys fill out an excel spreadsheet with all their material. And then we just throw what we think the pricing is.

--- Parts management (inventory) ---

KYAL

53:44 It's all sort of best guess is that's as good as it's tracked right now. But when you do a job, they just if they have it in their, and they pull it and they, and we just, you know, a lot of times even that material might even be paid for already because we purchased it on a big project. It's left over. It's excess. So I just don't know how that looks with your guys. What do you call it again? The partsledger?

LAUREN

54:08 Yup. You can track inventory. The reason I ask that is because partsledger does do a good job of tracking part costs and you can set up mark up rules so that price is automatically update based on the cost updating.

LAUREN

54:27 And the other thing to think about there is you can do average costing or you can do like first and first out and get pretty accurate with the job cost of those things like that.

KYAL

54:39 Long term, definitely. I think we are interested in looking at that just to start with. That would be, that would be like phase two or three.

LAUREN

54:48 Yeah, we'll circle back to that then later, but it's good to know that functionality exists. So, yeah, let me do this. I know we're getting close on time and I do turn into a pumpkin in about eight minutes. So I know field invoicing was something that was interesting to you. So let me do that. Do you want me to show you what that would look like?

--- ST app contracts and pricing ---

KYAL

55:12 Yeah, sure.

LAUREN

55:13 Okay. All right. So I'll generate this invoice, what is important to note? I don't think I added anything to this location and service trade along the lines of like what the pricing contract is for that customer. But if you do have a default, it will show up. So I can just put my standard pricing contract here. I can determine the level of detail that I share with the customer. So maybe we wanna do grand total only because as they say, where there's a mystery, there's margin.

KYAL

55:47 You...

LAUREN

55:48 And yeah, you like that from there, we can finalize that invoice. And again, that is a permission based setting, we can finalize.

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

KYAL

55:59 How grand you are, can that permission base fee?

LAUREN

56:03 You kinda have it or you don't...

KYAL

56:05 Yeah.

LAUREN

56:07 Yeah. So if you have the lineation between your residential and your commercial tech, I would only give it to your residential ones.

KYAL

56:16 It's more to the specific tech?

LAUREN

56:19 Yeah. You mean like some do it but some don't...

KYAL

56:25 Some, we would allow to do it some, we wouldn't...

LAUREN

56:29 Then you can do that.

KYAL

56:30 Okay. Good. Yeah.

LAUREN

56:32 Sorry, I misunderstood your question.

KYAL

56:33 To the individual?

LAUREN

56:35 Yes, per user base. So like I can do it, but Meda can't kind of thing. Yeah. Okay. And then from there, you can view that invoice and I could actually email it to you guys and I'll send it to you.

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

LAUREN

56:56 The other thing, is there's something called a work acknowledgement that you can get a signature from the customer at the end of the service, acknowledging what work has been done, and then you do have the option to include that invoice on there as well.

KYAL

57:14 That would just be a summary. More or less. It doesn't show anything else show a summary of the hours or is that still adjustable?

--- Tech time tracking ---

LAUREN

57:25 When you say hours, do you mean the billable hours, will the access?

KYAL

57:29 Yes.

LAUREN

57:30 You'll be able to see that?

KYAL

57:32 Yeah.

LAUREN

57:33 If I came in here, you can you get the opportunity to review this prior to asking the customer for their signature.

KYAL

57:41 Yeah.

LAUREN

57:41 But the hours is definitely something that you can give the customer the...

--- Tech time tracking ends ---

KYAL

57:46 Currently, unfortunately, we don't do anything, but we should, and I definitely with CD is 100 percent, we get the signature because we get payment right then and there, but we do need to start doing something. We just don't have the right system and process in place to make it efficient, but we do need to be getting acknowledgement for.

--- Tech On-site ---

LAUREN

58:10 Yeah. Well, here's what it looks like. I reviewed it as the tech I continue to review with the customer. Here's. Where I turn my phone or tablet around and say, hey, Dave here's, what I did today... here's. Your invoice. Here at the bottom, we did find here's. A picture of what I did here's. A picture of a problem that I found and they can look up that picture and kinda see like let them know, hey, you'll be

receiving an estimate from the office to keep it out for that. And then once David has reviewed it, he can acknowledge that the work has been completed and then actually sign he can get a copy... big D. And then we can also email to Alex and Kyle as well. So once I'm done with the work as the technician, I'm able to clock out, it'll ask me, hey, did you finish all the stuff that you said you were supposed to do? I can say, yes, if I had to take a lunch break or come back. If it's something that needed a call back, you know, we could leave that blank. The office is gonna see that, right? But in this case, we finished and I'll finish clocking out... I can come back to the office and then review everything that we've done. Our service has been marked as complete.

--- Tech time tracking ---

LAUREN

59:39 Here's, the wire that we used in addition to the billable labor. And then this electrical diagnostic fee here's the actual time. So this is the billable time. This is the actual time. So we can cross reference. Well, it only took 13 minutes. Do we really wanna charge the customer for two hours?

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

LAUREN

59:57 In this case? Yes, I do wanna charge the customer for two hours because we already sent them an invoice because we have a two hour minimum.

KYAL

1:00:03 Yep.

LAUREN

1:00:04 And then we can review the deficiency, the pictures files... and here's actually the copy of the signed work acknowledgement that was signed out in the?

--- Quote templates ---

KYAL

1:00:18 Are these standard templates or are they customizable at all?

LAUREN

1:00:22 This is pretty standard. I mean, you obviously have the ability to put your own logo and your own descriptions in here. But like what kinds of things are you imagining?

KYAL

1:00:31 We have a whole marketing department and they're very specific about our documentation, the appearance of it, right?

--- Forms ---

KYAL

1:00:38 So... yeah, just curious. I know some programs do offer full customization and they will actually take your existing documents and build them to match.

LAUREN

1:00:56 You could do that if it was like a maintenance checklist or something that you wanted to have in service trade, I'm sure can see has something specific to high voltage that they want you to use. But if you had like company specific like paperwork, you need to fill it out, fill out, you can put that in your account. But this signed piece of things is gonna look the same.

KYAL

1:01:18 Yeah. I know you guys have like the forms module, that stuff. I'm more talking about the work order acknowledgement forms, the invoicing appearance, all that kind of stuff.

--- Forms ends ---

KYAL

1:01:30 Just, I mean, we're a big company, so it has to not the whole company is not going to use this. So we still want some uniformity across every business unit, right?

LAUREN

1:01:45 Yeah. I mean, I get that. I think what your challenge is gonna be is since this is a little bit more out of the box and there's ways to get around it, of course, but since it is a little more out of the box, are you okay with maybe having an extra step or two to align with marketing's vision for, you know, the customer communication if that's if that?

KYAL

1:02:07 Well, right now, we're already are going to have to. So we're gonna do it like the way we're gonna pilot, this is great. This will be done. It'll be invoiced. But now David is gonna have to go to our ERP and copy this in there. So we're already going to be duplicating it in the future. I don't want to have to do that. Yeah.

LAUREN

1:02:27 Yeah. And it won't be an issue once we know we have the conversations about integrating with JD and things like that. But yeah, it's worth a conversation for sure.

KYAL

1:02:41 I'd be interested to see potentially how flexible your team would be to work with us long term, you know, just recognizing... the size of business we are and what business we can bring to the table.

LAUREN

1:03:00 Yeah, I can tell you this, we're not ever opposed to doing customizations, but it does cost, it is a cost as.

KYAL

1:03:10 Yeah, we're I mean, we're making the conscious decision not to go with the custom solution box solution, but we're hoping that we have a little bit of weight to throw around and try to get, try to partner. I want this to be a partnership, right?

--- Customer engagement ---

LAUREN

1:03:29 Yeah, definitely. Yeah. Likewise. It's mutually beneficial, right? Like our customers are seeing on average about a 25 percent increase in their service revenue year over year after implementing service trade. And as your company grows and consumes more of our product offerings and, you know, adds more technicians to service trade, you know, our company grows.

--- Customer engagement ends ---

LAUREN

1:03:55 So, so we definitely understand the importance of partnership for sure. We have an entire team, a professional services team that all they do is like special projects for customers. It is billable work. But just like you guys would have sort of like a time and material kinda job. It's really time and material type work. But if it's important to you, we're definitely open to working with you.

KYAL

1:04:22 You go quickly or do you have a few more minutes?

LAUREN

1:04:27 I've got a few more minutes before I have to before.

KYAL

1:04:32 Alex on David can sign off. I just, I have some other more in depth questions about some of the functionality and things related to the whole group. So.

LAUREN

1:04:42 Yeah, yeah. Certainly, Alex, David, any final thoughts before we let you guys go?

KYAL

1:04:48 No, I, thank you so much.

DAVID

1:04:49 Presentation really appreciate it.

ALEX

1:04:51 Yeah, same as well. Thank you.

LAUREN

1:04:54 You guys have a great weekend.

ALEX

1:04:56 You as well.

DAVID

1:04:57 Thanks.

KYAL

1:04:58 Guys.

KYAL

1:05:03 My first question just, I know that you guys handle multi sorta divisions and even locations. I just wanted to refresh my memory of how that actually looks. So it's super simple enough for me to say here, we're gonna pilot this out with one division, but say, see we go through all that effort and we get the a, okay. And then we start rolling it out to other groups.

--- *Type of work* ---

KYAL

1:05:28 I just wanna make sure that it's going to work because I'll explain while I am responsible for service small projects for the whole province of BC right now. Service is actually split into two different groups and one of which I'm not responsible for. So we have our technologies group and our service group which is electrical preventative maintenance technologies is data security controls under their umbrella.

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

KYAL

1:06:01 They do service work and long turn down the road. Eventually hopefully would implement whatever we decide to go with. And so the, we would all be under the same umbrella, but they may have different requirements to us. They have different is all that stuff. So I just wanna make sure that you guys can accommodate that.

LAUREN

1:06:25 You can for sure, I work with a group called climatech out of Phoenix. They've got, I don't know eight or nine locations and their companies actually, they're controls group. So they've got their controls service and they do their also fire life safety. So then they have that separate. So in all their offices, they actually have two

divisions in each of those offices. And you can just accomplish that by having offices specific to the market that you're in and specific to the service that you're providing, whether it's the technologies group or the electrical group.

KYAL

1:07:00 And then as far as reporting goes, what to sort of what level?

--- Implementation and ongoing support ---

KYAL

1:07:06 I do remember that I wasn't super throwing about the reporting, but I can look with it just because it's not internal. You guys use the Amazon?

LAUREN

1:07:17 Yeah. Yeah. I mean, all the data in service trade on our enterprise licensing. You'll have access to data warehouse if you prefer like Crystal reports or Tableau, or PowerBI, you can certainly use that. This is just one example visualization that I'm gonna pull up here.

--- Accounting integrations ---

KYAL

1:07:35 Does anyone use? So procor reporting is actually very powerful. Does anyone integrate their data with pro core reporting?

LAUREN

1:07:48 Quick site does support... multiple data sets in a single report. So, I think the answer is that can be done. I just don't know if anybody has done that before.

--- Accounting integrations ends ---

KYAL

1:08:03 I'm just curious because again, I'm trying to think of the big picture and see like, you know, my superior is a VP and so he would wanna see from the executive level, right? That.

LAUREN

1:08:19 Yeah.

KYAL

1:08:20 I just want, I just want, yeah, it's not, I wouldn't see it's a deal breaker. But one of the things that I've been preaching about us going down this avenue is the optics that we gain from the executive level down to, you know, whichever even to the technician level, like we want to be able to give our technicians optics on their performance. You don't have that ability right now, so.

LAUREN

1:08:45 Yeah, yeah. You can definitely do that. This dashboard is kind of revenue specific, but there are some interesting reports like revenue by job type, biggest open quotes, what your quote approval rate is. And there's actually a section. And again, this is just one data point for the technicians, but there's a section that shows who's identifying the most efficiencies... who is on time to the most appointments, who's running late to appointments?

--- Quoting ends ---

KYAL

1:09:19 Out of the box reports or do you have to build these scratch?

LAUREN

1:09:23 These are, yeah, but other reports that you can build by scratch and kinda collaborate with our team to do that for sure.

KYAL

1:09:33 Has to be through you guys. We can't build them.

LAUREN

1:09:36 It doesn't have to. I bet if you give this to your it team, they'll have a field day. They'll love it.

KYAL

1:09:41 We actually have a team that is, this is what they do. So.

LAUREN

1:09:45 Cool. Yeah, you can totally do that. We've got a couple of data nerd too, but all kinds of reports for us in a system called light dash.

KYAL

1:09:54 Yeah.

LAUREN

1:09:55 Yeah. There's flexibility there.

KYAL

1:09:57 That's good. So, I'm just trying to think realistic if we were to pilot this.

--- Implementation and ongoing support ---

KYAL

1:10:02 Like I discussed, what was my question? It just escaped my brain. It's been a long week... on. Yeah, I'm just trying to think of what that will look at like as far as implementation, like how quick can we, how quickly can you get this up and running? Keeping in mind that we sorta would be looking at building it as we go, like where this is. I know this is an unusual situation for you guys where you, the typical implementation plan is different. I think you guys, I imagine you would either assign somebody to implement it with us or send someone here, whatever you guys do.

LAUREN

1:10:48 Yeah. So... it's a typical but not unheard of. In fact, I just worked with a company out of the states who onboarded like their first four branches at the same time as sort of just staged roll out. And then they're slowly adding on the rest of their offices. They were sort of the problem children if you will when we wanted to get the processes nailed out first before, in the rest of the folks, I think the soon as we can get you started on your implementation would be may depending on how much data we, we'd be putting in, I would estimate probably 60 to 90 days to get you like using the system with your team, considering it would be just like a small group and probably an abbreviated implementation with not as much data coming into the system. And of course, that time period of like 60 to 90 day is also account for like training, having weekly calls with your team to kinda discuss best practices, things like that.

KYAL

1:12:06 Okay. Yeah. I get it. It's never as quick as everyone wants.

ALEX

1:12:13 Yeah.

KYAL

1:12:15 And what, as far as the, so you guys would require the data from us, we would give you the data. What like you're talking in CSV file or like what's how does that work?

--- Quote templates ---

LAUREN

1:12:27 Yeah, we have templates. We have templates for your customer lists, your, since it's already in excel, you, we can put in your services. Your, if you have your equipment list somewhere, there's a bunch of import templates or stuff like that.

KYAL

1:12:42 How much of that do you guys feel you require?

--- Quote templates ends ---

KYAL

1:12:46 Basically, I say this like we're trying to, not that we're trying to sort of this kind of a hush thing.

LAUREN

1:12:57 I can see it. Okay.

KYAL

1:12:58 Because if we go through our typical process and our it department finds out that we're like that's why we're going about this, saying this is standalone and it's to replace our semi existing nonexistent scheduling app that we have right now, which is it has nothing to do with it. It's a cloud based thing is specific to us. So we're going about it from that point of view. So we're going to be doing this in house ourselves. We're not going to involve our it team or anybody who deals with ERP system. So there's going to be a lot of stuff that we'll be doing ourselves.

LAUREN

1:13:38 Yeah. So it won't know, but your boss will know is.

KYAL

1:13:42 Yeah. Yeah. That's it's all good there. It's just get it involved. It has to go through a very specific process to get.

LAUREN

1:13:54 I'm familiar with these processes.

KYAL

1:13:58 We, we're not for like if we go down that road with the history of this company and it's it takes for like poor, has been in two years in the work. So that's how.

LAUREN

1:14:08 Yeah.

KYAL

1:14:09 We just changed swapped ERP systems about three or four years ago, and we're still working out the kinks now.

LAUREN

1:14:19 Yeah. Well, that's J, be for you?

KYAL

1:14:22 Yeah, we shouldn't have gone.

LAUREN

1:14:24 Yeah. Everybody I talked to is like, I hate it is not built for what we do, but here's my sense... I would not suggest a pilot without some services if you have data that you can scrape for us and give it to us, we can import it. But I won't I personally won't do a pilot where we don't have our team kinda helping you along because it's gonna fail. I've seen it happen. I've been given every excuse in the book and like, I cannot think of the single time where it hasn't failed. It's just been a waste of time for you and for me and for everyone.

KYAL

1:15:06 I've done it personally, that's how much software I've dealt with but that I'm not typical. I'm not your typical person because, but I've done it because I personally sat there and manually entered everything because I didn't have the data and I built it and I just, I was dumb and I pulled like a week of all my ears to get it done. So I am not suggesting we'll do that. I'm just saying that it'll be, it's gonna be a little bit of an unorthodox way because we aren't going to be working with our, it and our ERP team who have that data, they can pull it in seconds. The other thing I want to be careful with is long story short.

--- Accounting ---

KYAL

1:15:45 Our ERP database is like customer database and sites locations is because it wasn't implemented properly and permissions weren't monitored. So anybody could go in and create a customer and a site. And so there's...

LAUREN

1:16:05 Yeah.

KYAL

1:16:06 Spelling like if I got my ERP team to pull our whole database into CSV because I just wanted to see and I'm not even, can you say the bank, your report authority that you just use, there will be 10 of those in there?

--- Accounting integrations ---

LAUREN

1:16:20 The...

KYAL

1:16:21 Same customer, all the same place and not only that there will be a job connected to each one. So because it's our ERP system as soon as there's a job connected, we can just delete it, our accounting software. We have to then go transfer a.

LAUREN

1:16:36 All those.

KYAL

1:16:37 Costs and that whole job to the real customer or the one that we picked, then delete it. So we've had to anyways long story. It's I wouldn't want to import that data because I don't want all that crap. I would want to be able to start with our own list that's as clean as possible. However, I have to be careful because it has to match JD. So that when we do build integration, there's no issues.

LAUREN

1:17:11 Yeah. Yeah. So your hands may be tied, I mean, we can certainly clean up that data, I mean, and we do right before we inboard it because as they say garbage in garbage out.

--- Accounting ends ---

KYAL

1:17:25 Internally, we've cleaned it up ourselves. So we've made a point of, we have a process with my team because I have severe CD, so I can't stand that stuff. So we, we've got a process. So I feel pretty confident that we would be able to get the correct data but it would be starting on a smaller scale. So we're not gonna give you our full customer database. It'll be all our list customers that we deal with that we need. And then we can deal with the rest later. Either one of or we can do a secondary data dump or whatever.

LAUREN

1:18:00 Yeah, yeah, I mean, that, that's certainly possible, but yeah, I think what we should do and I really do need to head out here in a second.

--- Purchase decision ---

LAUREN

1:18:10 I think what we should do is maybe I can kinda get pulled together like an estimate of what I think a pilot would be with the associated service. And then maybe I can send that your way and get a call scheduled for next week to kinda talk about the feedback from David, your feedback on the proposal and then kinda determine what the next steps are from there.

KYAL

1:18:33 My back right now is, I'm pretty sure we're gonna go ahead with this with portion. So whatever we can do to expedite it prepared to do.

LAUREN

1:18:44 Let me, let me put some pricing together for you. It's the end of the quarter. So I'm probably not gonna get it to you today.

--- Purchase decision ends ---

KYAL

1:18:52 In that?

LAUREN

1:18:55 I know if you're like, yes, I wanna sign right now, I'd be like, yes, I'll drop everything, but yeah, let's connect next week. I'll get some pricing over to you. Maybe, do you have some time on Monday that we can go over?

KYAL

1:19:09 I will make time that's how this is at the top of my list right now?

LAUREN

1:19:13 Okay. What's the 11?

KYAL

1:19:15 It is.

LAUREN

1:19:18 Do you, do you have time at 11 30?

KYAL

1:19:20 I have a, actually a pro core meeting. I have time at noon on Monday.

LAUREN

1:19:31 I've one 30?

KYAL

1:19:33 I can do one 30. Yeah.

LAUREN

1:19:35 That...

KYAL

1:19:38 Preparing pricing, keep in mind that we have. I don't care what you do now because the small pilot, I get it. It's not going to reflect what we will end up with, but we have over 100 service technician.

--- *Pricing* ---

LAUREN

1:19:52 Yeah.

KYAL

1:19:53 Nations and that's electrical that's not the technology side.

LAUREN

1:19:58 Yeah, I think the minimum just to kinda give you a ballpark for the subscription for a pilot like this is about 14 K usd. And then the services associated with that is like three or four K that wouldn't include some of the reporting off the bat that's really just like the minimum viable product for a pilot like this.

--- Pricing ends ---

LAUREN

1:20:20 So, I'll pull that together. And then once you and I kinda go through it together and talk about like timing and everything we can discuss like flexibility there because we do something for an enterprise wide, we would negotiate something quite different for the amount of text I know that you have.

--- Pricing ---

KYAL

1:20:39 I would need to figure out what we can do as far as... if I had 15,000 dollar cost show up in one month, I could get flagged. So I kinda figured something out there.

LAUREN

1:20:56 Yeah, we can be flexible with payments and stuff. I just need a minimum of like a quarter of it upfront. Yeah, I'll start to work on that, and then I'll send you an invite for Monday at one 30.

--- Pricing ends ---

KYAL

1:21:11 Perfect. Can...

LAUREN

1:21:12 You remind me of your email address again? Just so?

KYAL

1:21:18 You don't remember it after two years?

LAUREN

1:21:21 Here it is. Kyle, dot Clark. How CA?

KYAL

1:21:24 Yeah. So on.

LAUREN

1:21:26 No, that if...

KYAL

1:21:27 You're going to be a partner with us, you got to pronounce it. Who will the who?

LAUREN

1:21:31 Cool. Okay. Look, I'm from the south. I know how to do dip tons and how it's very southern of me. So I'll get it, right?

KYAL

1:21:44 People say it. I mean, you make this sound?

LAUREN

1:21:47 Yeah.

KYAL

1:21:49 And all gone.

LAUREN

1:21:50 I'll plead the south, but I got it moving forward.

KYAL

1:21:54 Perfect.

LAUREN

1:21:55 Cool. All right. I'll send that. I just sent you that invite and then we'll connect on Monday and go over the pricing and discuss next steps from there.

KYAL

1:22:03 Awesome. Thanks guys.

LAUREN

1:22:05 Thanks, Kyle.

KYAL

1:22:06 No worries. Bye bye.

The End