



ServiceTrade Demo with JSThree LLC

Alec Ashby with JSTHREE and JSThree LLC
Recorded on 12/4/23 via Zoom, 1 hour 2 min.

Participants

SERVICETRADE

Alec Ashby
Territory Manager

Chris Resta
Associate NorthBoundary Account Executive

JSTHREE LLC

Chaz Huntwork
Service Manager, Partner, Decision Maker

JSTHREE

Shane Fisher

OTHER

Chaz With JS3

Topics

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Transcript

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

--- Call Setup ---

ALEC

0:00 Hey, Charlie. Can you hear me?

CHAZ

0:02 Yes, I'm just pulling up my laptop. I'm on my phone right now.

ALEC

0:07 All good, man. How are you doing this morning?

CHAZ

0:09 Overall, pretty good.

ALEC

0:11 Hired, what about you? I bet, man. I mean, I must say I've been doing this for quite a bit of time and I've never had someone join at six am. So, I do respect that. Are you guys early risers over there?

SHANE

0:23 Well, we...

CHAZ

0:24 Have to be otherwise, it seems like the day guess.

SHANE

0:26 Away from us.

ALEC

0:28 Yeah, yeah, that's how a service company goes well to answer your question. I'm going pretty well. I'm a little under the weather. I don't know if you noticed that in my voice or not. But besides that, everything's going pretty good. You know, this is definitely going to be a weird month, you know, with the holidays coming up, people are being in and out. So it's just always interesting to see how it plays out. You know what I mean?

CHAZ

0:48 Yeah, yeah, no kidding. That's funny. Yeah, my.

SHANE

0:54 Go ahead.

ALEC

0:56 You go bad.

CHAZ

0:58 Yeah, Shane, my partner is gonna hop on here in a minute too next week. We've got a five am call with another company and he's like Chaz are trying to kill me.

ALEC

1:09 Yeah, yeah, that's crazy to me. I mean, I respect that, but yeah, you might want to back it up to like six 30 or something like that. So, Chaz it seems like you're a part owner in service manager. Is that correct? It seems like you're kind of 50 percent owner, but you also do a lot of service manager stuff.

CHAZ

1:30 Yep.

ALEC

1:31 And then what's kind of Shane, it seems like Shane is also a 50 percent owner, but what's kind of his, what does he kind of do? I guess? Is he more of a defacto service manager as well or like what is kind of he do?

CHAZ

1:44 I guess we'll call him a business like the business manager... operation.

ALEC

1:51 Tons manager or something on the operations?

SHANE

1:52 Manager. Yeah.

ALEC

1:54 Okay. Sweet. And then, is still?

CHAZ

1:58 Morning, Jerry, probably not, but he might, okay?

ALEC

2:04 Okay. And what is, what does he do? What is, his role?

SHANE

2:09 Sales? Okay?

ALEC

2:11 Sweet. Okay. Gotcha.

SHANE

2:14 While we're...

ALEC

2:15 Waiting on Shane here, do you know, Oregon, by chance? Chaz, I was just curious if you.

CHAZ

2:21 Yeah, definitely know them.

ALEC

2:25 Yeah, cause I spoke to Graham and I believe his dad was Jim and they got really close last year to signing up with us. So I was just curious if you knew them because we talked to them quite a few times. So I don't know if you work with them or not. I know sometimes it's competition. Sometimes it's you know, there's a working relationship.

CHAZ

2:44 No, we just did a job with them. We both did different scopes on the same building. So it's kind of fun. But yeah, I don't really know them, but I know people who know them.

ALEC

2:56 Yeah, typically how it goes, you know, everyone's working like 58 hour weeks kinda hard to get to know people, but yeah, definitely get that cool.

SHANE

3:09 And we can.

ALEC

3:10 Definitely, you know, wait for Shane to come in or if you want to get into, we can, whatever up to you. We can definitely, I wanted to just make sure I'm being respectful of your time.

CHAZ

3:19 Yeah. Well, let's just give them just maybe just only one more minute and then let's just and then let's just rocket.

ALEC

3:25 Okay. That's fine. And then I see you joining here. Is that just you joining on your laptop?

CHAZ

3:30 Yep.

ALEC

3:32 Okay.

SHANE

3:33 And I guess while we're...

ALEC

3:34 Waiting on Shane for a couple more minutes, I do just kinda want to get some of these surface level questions out of the way just so we can keep this as engaging as possible.

--- Call Setup ends ---

ALEC

3:45 But I saw here from the notes from chat or not Chaz from Chris who spoke with over the phone. Seems like you guys do about 65 percent projects, 35 percent service. Are those projects? Are you guys typically doing GC projects or owner projects? I saw here that they're typically one to two weeks. So I just wanna make sure those like more owner projects where you own the relationship or are you guys typically working with GC or you guys the GC? Like how does that kinda go for that? You guys, how's that kind of broken down?

CHAZ

4:25 I would say very little of it is GC work.

--- Pricing ---

ALEC

4:29 Okay.

ALEC

4:33 Nice. And then I saw here as well. Nice to see. Yeah, nice to... I saw your two, you did like 35 percent service. It seems like you guys are like 50 50 as far as preventative

maintenance versus just reactive service calls. Is that accurate or is that a little off?

CHAZ

4:54 We definitely, I would say we're probably, yeah, probably 50 50.

ALEC

4:59 Okay. And are you guys trying to grow those preventative maintenance contracts by chance or are you guys kind of cool where the ratio is at?

CHAZ

5:10 No, we're definitely a young company and we're looking to grow everything.

ALEC

5:15 Okay. So, I'm assuming too, does Jerry kinda do european sales or is he kind?

--- Pricing ends ---

CHAZ

5:20 Yeah.

ALEC

5:21 Gotcha. That makes sense.

CHAZ

5:22 That's the primary role.

ALEC

5:25 And with you guys trying to grow everything, I mean, do you guys envision you guys being a more project heavy company or would you like it to be more even kill? Like what part of the business would you like to see grow the most? I guess?

CHAZ

5:42 We definitely like to have a very strong service maintenance side because even if things get slow or if the economy takes a down term, we always have that maintenance base to really fall back on and that's just, you know, guaranteed work. So, I'd really like to be more, I don't know. I don't know about maybe more, a little bit more service heavy would be nice.

ALEC

6:06 Yeah, that's very smart because a lot of companies regardless of where they're at, you know, young companies, old companies especially with, you know, coming up on an election year and all that uncertainty that comes with that having a PM contract is pretty recession proof as well as when they do when it is time for projects, you know, your trucks, the one in there four times a year or two times a year.

CHAZ

6:32 Yeah.

ALEC

6:32 It's kind of free marketing that you don't really have to pay for. Okay. Yeah, cool. That was just my main, you know, just kinda, I just wanted to get a better sense of your business and kind of where you're at where you're trying to go cool. Okay. Well, do you just want to go and get into it? I know.

CHAZ

6:53 Yeah.

ALEC

6:54 Okay. That's fine. Well, just to introduce myself, Chaz, my name is Alec Ashley. I'm an inside territory manager here at service trade. I've been here for over a year now. So I talked to commercial service contractors every single day. Really, the goal of these first meetings is just to make sure service trade is a good fit. So the way we kinda go about that is I kinda wanna ask you a couple of questions about your workflows, what workflows you're looking to improve once you get a better understanding of those and your goals, and we'll then hop into a brief demo, kinda show you things based on our conversation. And then if you like what you see here, we can talk next steps and what we need to do to make a decision whether if it's going with us or someone else. Does that sound good to you?

CHAZ

7:36 Yes.

ALEC

7:37 Okay. Sweet. So ServiceFusion, right? I saw here, I literally saw in the notes, Chris said that you guys just didn't like it kinda wanna learn a little bit more. I have an idea based on his notes here. But why did you guys go with ServiceFusion? How long have you been with them? Like kinda tell me a little bit more about that.

CHAZ

7:59 Yeah. So we've been with them for pretty much, I think pretty much a year now. And before that... for that, we didn't really have, we were using Jobber and then Jobber is just like, you know, pretty much nothing. And so we didn't like Jobber and then ServiceFusion, we definitely don't like we weren't right? We wanted to jump into, a bigger software that was more expensive and commercial geared, but we didn't really, I know we had the finances for it, but I think it would refer to our growth. So we chose not to do it. So that's how we ended up with ServiceFusion. ServiceFusion is just is junky in every way. I mean, the, we are text constantly complain to us about how the app for their, on their phone doesn't work or keeps clutching out. You got to reset it. And we've you know, I believe in giving people feedback and I've given ServiceFusion feedback and they are not very responsive. So, their support sucks.

CHAZ

9:06 I hate how we have like I want our text to when they keep track of their time on the job. It also counts as their time card. So like right now, our architects constantly have to be tapping their phone because we have to say, you know, clock in for the day. And then I'm driving to the site. I arrived at the site. I finished the job. I'm clocking out for break. I'm clocking out for lunch. It's just so much and I feel like it's unnecessary. I'd like just to have like say you put two hours on a job today or let's just say you did an eight hour job, you put just eight hours down that's it and that counts to your time card and your... and build towards the job.

ALEC

10:02 Gotcha. And are they turning in like a paper like time card or you guys just relying on the data with fusion? And is that more for payroll or billing the customer when you're I'm assuming you're talking more about payroll, but I just want to be sure.

CHAZ

10:16 Yeah, no, actually. So both. So the first both and they're different. So the first thing they do when they open up the app right on the home screen, they clock in for the day and that same button, you can clock out for the day and that's their actual time card. And so it's completely disconnected from the jobs they actually do. And then the jobs there's actual, you know, driving to the site arrived on site and all those buttons they have to keep pushing. Otherwise it goes up ServiceFusion the way it tracks time towards the jobs.

ALEC

10:52 And then, are you guys doing that payroll in Quickbooks or where do you guys kind of do that now? Or do you have someone do that for you guys or?

CHAZ

11:00 Yeah, payroll or I mean Quickbooks online?

ALEC

11:03 Okay. So in short, we have a variety of ways you can do that now. Similar to ServiceFusion. We're not a payroll system. However based on what you just told me, I think I'd be a little bit simpler and you have a couple of different options as far as you want to do it in the core. Ap, we also have this add on that's pretty inexpensive for what it does. It's called service time card. I can maybe send you some information about that that's maybe going to be a little bit easier for your text, but we'll kinda lightly discuss that, but I think we can definitely make that a little bit simpler for you guys. But anyways, as far as ServiceFusion, is there any chance that you guys stay on ServiceFusion or are you guys pretty committed to getting off that platform?

CHAZ

11:49 We can afford it now. So we're gonna leave.

ALEC

11:52 Okay. Gotcha. Cool. So.

SHANE

11:55 Know, we talked a.

ALEC

11:56 Little bit about how you guys want to grow your PM contracts, how you kinda like the recession proof side of it. So just kinda two questions for you. How do you guys manage the ones that you have right now? How do you know when they're due? Are you doing that infusion? Are you relying on spreadsheets? Like how is that kinda going right now?

CHAZ

12:15 So we have a mixture. We have like a kind of like a master excel sheet. So whoever can see all of our contracts, who can see all of contracts in what month they're due, just so we make sure we can't we don't miss anything. We have been playing around. We first did reoccurring jobs, but in ServiceFusion, but which turns out we definitely don't like that because it's the same exact job that reoccurs and so that means all the notes and everything. It just gets really goofy. So we have to create separate jobs. So as far as just making sure we're on track, we use an excel sheet but for everything else we use ServiceFusion.

ALEC

13:04 Okay. And is that excel sheet? Is that hard to manage? I mean, do you guys ever have PM slip through the cracks? Or you ever have some human error with that? Like how does that go?

CHAZ

13:14 We have human error not because of the excel sheet but because of... just because of the... we have human error because honestly, Shane and I are busy and sometimes we just things kinda slip through the cracks that's kinda what I, that's what it comes down to, but I can't blame excel for it.

ALEC

13:37 Right. Yeah. You seem like you're pretty well versed at excel and change just to kinda catch you up to speed on what we've talked about so far. We've kind of talked about where you guys are at, where you wanna go. Some of the things you guys don't like about fusion. We're talking a little bit about PM contracts. But now one of the main ways that we stand out from other platforms guys is like the pool through work. So the process of, hey, you're on a quarterly PM, my tech finds a broken compressor. How is your tech a report that, how is that information going to get back to the office? So you guys can send out a quote as quickly as possible? So just curious on how that's working right now. Is that something that you guys do infusion, are your text just calling or texting you guys or yeah, sending the quote out of fusion, how does that process go with the tech finding a repair in the field, getting back to the office and sending the quote, the customer? How does that process go?

CHAZ

14:32 That specific process is very broken with us. ServiceFusion. I don't think ServiceFusion has a great way, bulletproof way of doing it. There are more stuff we can kinda mess around with in ServiceFusion, but a lot of things get dropped on that. There's there's a large disconnect we're trying to make sure our techs are good about communicating with us because right now that's kind of we just rely on them to communicate to us. Shane also tries to review some of the notes and stuff. But, honestly, he's too busy to read every little detail in the notes. And we're in the process of fixing that though because we also hiring a full time office Gal. So, and then hopefully switching this platform will make that a lot more streamlined.

ALEC

15:23 Yes. So there's you know, a lot of platforms out there and, you know, ServiceFusion, it's a good platform. But at the end of the day, they work with pest control companies, they work with long care companies. They work typically more in the residential space with you guys being in the commercial space. You know, you're working on complex equipment. A lot of times, you don't just see that complex equipment once. So some of the things I think you're running into are pretty normal problems that our customers that have come from fusion to us. Have seen. Now, what I will say is that, you know, the pool through workflow is probably what we're the strongest at. You're gonna look at a lot of different platforms, but that specific workflow is definitely one where I feel like we're pretty strong at. So where do you think the missed opportunity is? Is it getting more quotes out? Is it getting more quotes approved? Is it the tax reporting? More? Like where do you think the opportunity is being missed? If you were to take a guess?

CHAZ

16:16 All of it, if our text or text don't effectively communicate to us, then, you know, the rest of the processes just disappears... but really all of it.

ALEC

16:29 Okay. All that.

SHANE

16:30 I...

ALEC

16:31 Would...

SHANE

16:32 I would say we're not utilizing ServiceFusion the way it's intended to be utilized from the estimate perspective. So literally on the job, we have the guys fill out a separate sheet that's our internal sheet. And then we're supposed to take that and kind of turn it into a proposal internally, right? Or read through the notes and follow up with those guys. So the estimate side from ServiceFusion isn't as clean as we'd like to see it. It's clean from the perspective. Let the customer gets the information. It's just not very personalized, if that makes sense. So I'd be curious to see what you guys do in terms of you talk a lot about both your work, right? So what is your estimate

look like? And I'm sure that goes through from your platform using maybe a template that we've identified or given you or, you know, your internal... platform?

ALEC

17:33 Yeah, yeah, absolutely. So in short, you won't have to go outside the platform to do that. And the reason that's important is that's a workflow you guys probably do every single day, that should not be something that you have to go outside of your platform to do. And, you know, I do a lot of these demos and we do get a lot of good feedback from the quotes and you can send a quote from scratch or it could be from a pull-through opportunity. So I'll definitely send you one of those during the demonstration. Well, is there any other, you know, must have functionality that we have not talked about yet or that's important to you guys that haven't come up so far?

CHAZ

18:15 I wanna make sure you write down, the definitely the whole time tracking piece we touched on.

ALEC

18:19 Okay.

CHAZ

18:25 We just want it to be, we just wanted to be smooth and intuitive and honestly, Alex, like we don't expect your platform to be perfect. And we just want when I say good customer support, I mean, I want, we want people to be kinda be open and honest with us, you know, because not a single platform or any other company that your competitor is going to have the perfect thing. And so we expect there's going to be a couple of workarounds or whatever, you know, or stuff you're working on. We just wanted to have the, be the best informed as we go into this.

ALEC

19:01 Yeah, yeah, no, I definitely appreciate that because it works both ways, right? You guys have to understand there's nothing perfect out there, but we have to understand that, you know, at the end of the day, whether you go with us or someone else, it's going to be a left financially for you guys. And with that list, you should have better customer support, better transparency, stuff like that. That's something that we do take, you know, very seriously over here. So, I mean, I've turn people away. If I don't think it's a good fit. I usually don't sell it as well as, you know, I have signed up quite a bit of customers. I've only had two reach back out to me and ask for a refund, and both of those are very unique situations as well as, you know, since I, you know, work local here. We're local here in Durham, North Carolina. I get to talk a lot with the account management team and most of the time, you know, getting through implementation, they're pretty satisfied with our product and the transparency we provide. So definitely, you know, want you to understand that we're not a company where like, hey, we're doing this and then we don't do it. You know, we're very big on being transparent as well. And I know that's something where I'm just telling you that and that's something that you probably would rather experience, let me just tell you. But that is something that I've seen myself for the customers I've seen signed up myself. And we can, we'll definitely touch on that time piece that might be a good thing for follow-up demo. If you like what you see today, we might wanna do

honestly the more you're talking about, it seems like the time card tool might be worth exploring further. So that might be worth another conversation or another demo potentially. So we could maybe talk about that. And then I also saw to here that you guys seems like you wanna make a decision in January or February because of finances. And I definitely understand that. Are you guys cool though with implementing a software during the summer? Is that, does that concern you guys at all? Or are you guys kinda already accepted that when you made that decision? I just wanna make sure that I don't...

CHAZ

21:06 I don't think, yeah, I don't think we really wanna wait till summer is going to be, you know, our busiest time is the hardest to implement... and spring starts picking up too. So we're actually, we're just, we're busy as all get out right now, but we'd like to get this done and over with sooner than later to be honest.

ALEC

21:27 Okay. Yeah, that's good.

SHANE

21:28 You ask that question because of your guys as workload or what? Well I.

--- Pricing ---

ALEC

21:34 That question to make sure we're on the same page. But the second reason I do is typically companies of your size. It takes about 60 to 90 days to implement service trade. And right now is our busiest time of year because just like you guys, everyone into the year trying to get cash off the books trying to, you know, in the year, right? Hey, how can we make things better? Now? We have a lot of companies signing up right now. So like realistically, if you were to make a decision this month, you'd probably be looking at like February start date unless you made a decision a lot quicker, which does seem like you'll be able to do that.

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ALEC

22:12 But I just wanna make sure that, hey, if you don't want to be implementing in April, then we probably should make a decision this month. If you get what I'm saying that's why I asked that question.

CHAZ

22:24 We go.

ALEC

22:27 Cool. All right. And then I saw too that you guys, you know, looked at spectrum seems like you weren't really too hot on. That. Seems like you're still talking of

BuildOps? Is there any others that you guys have liked or what's kind of been your general opinion on the ones you guys have looked at so far?

CHAZ

22:44 Spectrum we didn't go with mainly because they're a huge corporation and he told me that changes are slow, very slow and just the whole process of trying to get things resolved. They've got some limited hours, BuildOps kinda sit out against that because they kinda have support staff 24 seven. I thought, well, hey, that's awesome. You know, not that we're going to be calling in the middle of the night.

ALEC

23:14 Right.

CHAZ

23:16 Yeah, one, yeah, we didn't like spectrum for a number of reasons and, they're just too big too much corporate into their platform. And so we really like we're so far we were like BuildOps. You know, we like our guy similar to you. They got, some, they got a lot of good stuff for like tracking projects as we continue to grow and get bigger projects. I think that will be extremely helpful. But also there's a lot of customizable forms that you can have the text fill out. The, the time tracking piece. Seems like it's locked in the way we'd kinda like the way I'd kinda like to see it. I don't know if Shane and I totally agree how we want to do time card yet, but... yeah. Okay.

ALEC

24:08 Okay. Well, yeah, that's good. I mean, yeah, and you know, just to touch on spectrum, they are kind of more well known in the ERP space or the accounting space and Construction space. That service for them is kind of an afterthought. So, yeah, I definitely think you made the right call there and then BuildOps, you know, up and coming company definitely can see why you liked a lot of the stuff they showed you.

--- Wrap-up ---

ALEC

24:31 So I'm definitely excited to show you what we got today. But anything else for me guys before we get into?

CHAZ

24:35 It...

CHAZ

24:40 Nothing for me.

ALEC

24:42 Okay. So I just have a few quick slides that I go through just to give you guys a little bit of background on us. And then we'll kinda go through the demo. And then if you guys have any questions about anything, feel free to interrupt me or ask. Definitely wanna make sure we're on the same page with everything. So just give me one sec. I'm gonna go ahead here and start sharing my screen.

CHAZ

25:03 I will just say we do have like a kind of a hard stop at seven or a little bit prior would be even better like a couple of minutes prior because we've got a mandatory meeting company wide, so.

ALEC

25:15 Yeah, you're good. I appreciate you letting me know that. So I'll definitely keep these slides pretty concise. What I figured I'll go through today definitely is that pull-through workflow because to be honest with you Chaz, that's the main reason people renew a service trade by service trade. There's a lot of other things too but it's typically something that's, pretty important to folks. So I'll get through that today. And then if you guys like what you see, maybe we could, you know, set up some follow up or whatever we need to do. Does that sound good to you?

CHAZ

25:43 Definitely. I would definitely want a couple more follow-up calls if we really love it today.

--- *Wrap-up ends* ---

ALEC

25:48 Okay. Sweet. Yeah, we can definitely do that. So I'll go through this pretty briefly and if I'm talking too fast, just let me know. Trust me, I'm not from New York, but I do sometimes talk like it. But anyways, today, the main thing I want to go through with you guys is the mobile view. How do your text report deficiencies? The office? How does that go back to Shane or anyone in sales to send out a quote? And then the customer view, how does the customer receive a quote? And then if you like what you see today, we probably wanna talk maybe set up a follow up demo to go through equipment tracking, PM, tracking a, maybe some projects, stuff like that. So as far as service trade, we understand right now, especially with you guys being a young company that there's a 40 percent shortage of technicians in the workforce basically meaning that every single year there's an eight percent loss of text in the workforce. This is a lot because younger folks aren't going to school for the trades. Older folks are retiring for the workforce. So what that practically means for you guys is the amount of technicians you have on staff versus the work that you have available. That gap is growing every single year. So for a lot of our customers, it's not so much of like, hey, how can we win more work? It's more about how can we prioritize the work that's the highest margin? How can we prioritize the customers that are the most profitable for us? And how do we form long term relationships with the customers we wanna work with that way. We're not running around tracing, you know, break fixed calls or doing the work. We don't really want to do. So a lot of people that come to service trade to either, you know, control costs, whether that could be, you know, setting up your technicians for success? I know you mentioned a little bit about how the app glitches for your guys and your guys are kind of

struggling to use it. So we'll definitely give them an app that works a little bit better than what you're using now and then as well as improve your service or project operation. So we have things, you know, like work in Progress, managing a budget, it phase billing, all that stuff. And then as far as our growing quality revenue, that's kinda the piece I talked about where, you know, you guys want to sell more service agreements can already express that to me as well as working with customers that, you know, you guys wanna work with. And really the keyword there is quality. How can we fire the bottom five to 10 percent? Of our customers that maybe you're difficult to work with or use portals or stuff like that. And then this slide here just kinda shows you some of the main ways that we stand out. So there's a lot of platforms out there. I'm sure you guys are going to do your due diligence here's. Something like the four major ways that we stand out. So really one piece of this is the planned maintenance agreement. So automating the process of reminding you when a plan maintenance is due, also streamlining the pool through opportunities that come from those plan maintenance agreements, tracking equipment. Your text will be able to see all the high level information about the equipment you guys work on as well as you guys in the office can see, hey, we've seen quite a few issues with this, maybe recommend an install stuff like that and then enhance customer communication. So, you know, a lot of our customers, they're kind of obsessed with this especially around the holidays, this Amazon prime field. So we give a lot of our customers the power to, you know, communicate effectively to your customer. Because one of the ways you can stand out outside of just competing on price is, how can we give the customer all the visibility they need to make a decision? Know what's going on? Because oftentimes the person you're billing isn't the person you work with on site. And one thing I'll add to this too is we did this year develop a lot of project management features. So for those owner projects, you'll be able to track a lot of that stuff here. And then the interest of time, I'm just gonna skip this slide, but this just kinda goes through the, you know, various parts of the business that we can affect or bring positive impact to. And then this slide right here just simply goes over that. Hey, we've been in business for over 10 years now. We've had multiple rounds of funding unlike, you know, ServiceFusion and some of the other companies you talked to, all of our product development budget goes to commercial service workflows. We've been in this industry now for 10 years. So we worked originally with fire protection contractors. And then about five years ago, we since expanded to mechanical. So we work with companies like blue hat mechanical. I don't know if you're familiar with a read. They're out there in the west. We work with them as well. And this just kinda gives you an idea of the impact we've had. But before we get into it here guys, do you have any questions or comments on any of that?

CHAZ

30:24 No.

ALEC

30:26 Okay, sweet. So I'm gonna go ahead and get into it here. Like I said, just let me know if you have any questions. But where I wanted to get started off today is I wanted to start off of what a work order looks like in the office view.

--- Pricing ---

ALEC

30:45 Now, this is a preventative maintenance work order. So what you'll see is that and I'll probably go through this next time we meet. But how I set this up, this is a

quarterly PM where I have a set of things we need to get accomplished here. So what are we here to do on this PM? We also have two things here. So I have in contract and then I have the equipment I'm working on. So the reason that these two things are important. So in service trade, you can have multiple pricing contracts, you can either have one universal or if you have a pricing contract specific to that client, you can have that as well.

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ALEC

31:21 And this is really going to help you scale because it's gonna tell you what you guys expected versus how you actually performed, what invoices were associated with it. And this is what's gonna automate the markup rules. So for example, if trip charges are marked up double, you can put that in there. That's just an example and you can, you know, set all your markup rules right here.

ALEC

31:48 And then as far as the equipment tracking piece, I know you kinda mentioned to me about a lot of the limitations of ServiceFusion and how it's more residentially based here at ServiceTrade. We understand the importance of tracking the equipment. So you can track as little or as much information as you'd like about this equipment. So you can see here that I have quite a bit of, you know, information here like a serial number, barcode, number, filter, size, filter, quantity, warranty, date, refrigerant type kind of up to myself. If I want to track all this or just some of it, you can track all that here. Your text can see some of this information in the field as well. But you guys can also see, you know, what PMS do I associate with this piece of equipment? What work orders? Have I ever logged in this piece of equipment, what deficiencies or repairs? Have we ever reported? What's quotes, and what's the status of the quotes? And then any attachments. So if you want a manual or something like that in there, you could attach that as well.

ALEC

32:53 Now, do you guys track?

SHANE

32:55 Equipment?

ALEC

32:55 Right now or how does that kinda go for you guys?

CHAZ

33:00 We can not currently go ahead.

SHANE

33:04 We have track equipment. So some of our customers are specific to it. Others get care less. We don't really report that information too much to them. But we do have equipment uploaded to ServiceFusion that gets pulled over on specific

maintenance. So there is a history there. We don't really use it for much of anything. But there it is there. Okay.

ALEC

33:29 Okay. And, do you like using that feature? Is that just not really that important to you guys?

SHANE

33:34 I feel long term, it adds value. But... so like I said, some customers don't care. So I would prefer if we went after something, we stayed with it and just made it consistent across the board. But... I think there's value there.

ALEC

33:57 In your right Shane and that most of this value is long term, it's like, hey, we've worked on this for a couple of years and we've seen that it has quite a bit of issues, maybe recommending that install or, you know, you kinda touched on the service history piece? What I've heard from a lot of folks that come off fusion is that they deal with a lot of phone rodeo. So instead of you guys focusing on sales or focusing on something else, sometimes the text will call in and be like, hey, what happened on this last time? So sometimes them having access to history in the field, which it seems like they have now can be beneficial because it shuts down that phone radio.

CHAZ

34:37 So tell me this, what's the difference? A couple of scenarios here? Because I'm still kind of undecided whether or not like I like having the equipment in there, but I don't know a couple of scenarios. So like... let's say you do a maintenance and it tags all the equipment on a building, right? If you go back to look at where you're at now, looking at one specific unit, it's gonna pull up everything for that maintenance, right?

ALEC

35:08 Everything for that maintenance that's been associated with this unit. So if you go work on the boiler, it's not gonna put all the boiler work here. But any PM I've done on this piece of equipment or any reactive service call? I've done on this piece of equipment can be associated with this page. It's also up to you. I mean, you don't have to do that, but that's how most of our customers use it.

CHAZ

35:32 Okay. So.

ALEC

35:36 Is there a reason that's kinda, is that causing ServiceFusion? It's kinda all blogged together or is there a reason that I'm just curious. I...

CHAZ

35:44 Surface fusion. Yeah, ServiceFusion. We don't use this feature at all. The only feature we use is basically just keeping track of model and serial numbers and filter

in both sizes. We aren't really, we're not really. I mean we are tagging it to Shane good about tagging it to maintenances. It doesn't really do much when we're not really consistent with like tagging on everything. If that makes sense, you know, because, you know, everybody can see the history of jobs on each customer. You know, it's very simple to go and view the history. I'm just asking because I'm trying to figure out if it's worth us if it's worth all the effort from the office and the field staff to basically be, because the office and the field are going to have to be tagging each piece of equipment. And so another thing is too is like, well, you know, can we set up service trade to where the tech before they can close out the job or pause it or whatever? You know, they have to tag a piece of equipment?

ALEC

36:49 Yeah, great question. So, the way most of our customers do it is when the dispatcher dispatches out the work order, we make it pretty simple to associate it with whatever piece of equipment you guys want. Now, keep in mind, you can't always associate it with the building. So if for whatever reason, you don't wanna do it or you guys don't know what piece of equipment it is, you don't have to do that, but most of our customers have the office do that. Although the text can do that as well. And that way when they go out in the field, they already know what they're working on. So they don't have to call the office back or figure out where they need to go. They know exactly what unit they're gonna work on as well as you can set up unit groups as well. So you have, you know, a couple of us on the left side of the building and you need to work on all four. You could set it up that way too. So just kind of up to you guys.

CHAZ

37:39 Is there a way to force the text? Let's say the office doesn't do it because they don't know which I think is going to be our case, especially the first six months of next year. Is there a way to force the text to do it before they can close the job out?

ALEC

37:54 So that specifically, I'm not sure of, I can definitely get back to you on that. What I do know is there are ways to force them like, hey, if you want them to leave a before and after picture, after every job, you can force them to do that or, hey, we need you to leave a comment, stuff like that specifically.

CHAZ

38:11 I'm not.

ALEC

38:11 Exactly certain. Like I said, I do know a lot of our customers have the office do that, but there is a way for the tech to go in and associate with the piece of I'm just not sure if they have the digital handcuffs. So I'll make sure to let you guys know that on our next meeting.

CHAZ

38:27 Okay. That'll be cool.

ALEC

38:31 Cool. Well, anyways, what I'd like to do is I know we got about 13 more minutes here. I'd like to go out in the field and kinda show you how your text would work on this job, how that stuff works, and then how they could report a deficiency and quoted out. Does that sound good to you guys?

SHANE

38:47 I...

CHAZ

38:47 Do...

ALEC

38:47 It... all right. So just give me one sec, guys. I'm gonna go ahead and stop sharing my screen here... and start sharing my screen here. Now, while I'm pulling this up, this app, it can be used on iPhone or android. It can also be used on a smartphone or a tablet. Basically, what you're looking at here is the work orders that I have going on for today. Now, there's all types of ways I can organize these work orders or filter them out. But just keeping it simple for today. I'm just showing you the work orders for today.

CHAZ

39:23 Cool.

ALEC

39:26 Now, if I click on this work order here, this is basically what a work order looks like. In trade. Now, you'll see that there's multiple clock events we can log, but it seems like your technicians prefer to just clock in and out. They don't wanna do the whole in route thing or all those options. So if that's what they prefer to do, if they clock in, they can just simply click the clock in button here. What that's gonna do is take a GPS snapshot, you're gonna see that, hey, Alec is 340 Miles away from this target in Pittsburgh might be a tough phone call to Alec. So that's kind of how they can clock in and out of jobs. Now, some of our customers use the clock in and out for internal stuff for example, like payroll as far as billing the customer that's where the job items come in. So your technicians can add job items, your office can add job items, service trades, very permission based. So whatever you prefer them to do, that's where they're gonna add the items that you're actually going to Bill the customer. And we do have some customers that use this for internal stuff as well. So it's just kind of up to you guys. But the two major ways to track time and service trade is the clock events and then the job items. Any questions on that?

SHANE

40:42 Nope. I.

CHAZ

40:43 Yeah, keep going. I'm curious about the job items, but yeah, I keep.

ALEC

40:47 Okay. Yeah, we can definitely dive into that a little bit more. I'm gonna kinda touch on the main things real quick too. So, you know, you got your services, right? What am I here to do? What am I here to work on? So this is gonna tell the technician what he needs to do and what he's here to work on. We also have these comments. So these comments can be site specific comments, job specific comments. This is where, you know, the phone rodeo. We're trying to cut that out, right? So if they have an access code they need access to or they need to bring a tall ladder, they can do that. We've also heard that, you know, technicians typically don't like doing a bunch of admin work especially in the fields. So we try to give them as many ways to give you guys high quality information as you guys would like. So they can talk to text. They can leave a comment. So if I save this here, save these job notes, they also can do other stuff to like take pictures or leave audio memos. So if they have anything they want to convey to either internally or to the customer, they can do that. So they can go in and leave audio memos or leave any picture.

ALEC

42:00 As far as the job items. So like I said, they can add job items, they can make adjustments to job items. What our customers do typically at least on the preventative maintenance or plan work side is typically have a good idea of what they're gonna use before they go out there. So this is about 80 to 90 percent of the way there. If the tech needs to make any adjustments they can, or if the office once the tech logs this call and it gets back before passing it onto billing, they can double check to make sure everything looks good. So this is where they can add, you know, parts, labor items, or make adjustments to any parts labor items.

CHAZ

42:36 Okay.

ALEC

42:41 And then the last piece here is we have our asset section. So this is where the technician can go in and see what he's working on today. Cool thing is that he can see all the stuff that, you know, he's working on today or that, you know, is on this site. So you can see, you know, any generators or groups we work on. You also notice here too that we can always tie work orders to the building. You don't necessarily have to tie it to a piece of equipment. But similar to what I was showing you earlier, they can see all that information. I know you kinda mentioned to me that you guys have filter quantity and filter sizes and that's kind of some of the stuff you track, they can see that there. And then they can see any service history. So regardless of if they did the last call or someone else did, they can see that they can see any deficiencies. So any repairs that have been reported, and they can see any files or photos, comments, stuff like that.

ALEC

43:42 Any thoughts on this app so far? I know that I've kinda hit you quite a lot here. So definitely don't wanna make sure I'm going too fast. But, any opinions on this app or what do you guys think you guys would think of this? Like what's kind of your thoughts on this so far?

CHAZ

43:57 So far, I think.

SHANE

43:58 It's like.

CHAZ

44:01 Yeah, keep doing so. Yeah, definitely. It seems like it's clean and it's nice and smooth. You know, well, there's definitely some helpful things I will, could you touch more on? Don't hate me too much, Alex, but.

ALEC

44:18 You're good.

CHAZ

44:18 You test a little bit more on like how they would clock in and clock out for the day?

ALEC

44:23 Yeah, yeah.

CHAZ

44:24 Like their actual time card?

ALEC

44:27 Yeah. So if we wanna take a look at time card, I would need to bring in my technical expert and they could give you a lot more in depth demo. But in short, how time card works is like I said, some companies use the job items piece, some use clock events, but basically how it works, do you guys do payroll like once a week every two weeks? How do you guys kinda do it there?

SHANE

44:52 Every...

CHAZ

44:52 Week?

ALEC

44:54 Okay. So how it would work is your tech, however you guys want to do it internally. A lot of our customers just use these clock events. They review their time sheet either at the end of the week or the end of two weeks. They go in and be like, hey, is all this correct? Maybe I made some errors, you know, fix those errors. They submit that time card to either Shane you, or maybe you delegate that to that office person, that person would look it over, make sure it's correct. And then once that's all correct, she could go ahead and prove it or you guys could approve it. And then

now you have your record. So some of our customers use that. Now, if you don't use that, we do have some reports you can run in service trade. So at the end of the week, end of the month, end of the two weeks, you can see all the clock events you've either logged or if you'd rather see the job items kind of up to you guys. But if that's a really big priority for you, I do think that, you know, probably exploring time card would be not a bad idea just because, it really isn't that expensive honestly. So does that give you a little bit more on how that kinda works? Or do you need a little bit more detail than that?

--- *Wrap-up* ---

CHAZ

46:05 No, that's perfect.

ALEC

46:07 Yep. So the concept is they do their thing, probably gonna make some errors. They fix their, submit the card. You guys approve it and then do what you need to do with it from it.

CHAZ

46:17 Perfect. So.

ALEC

46:18 And we'll definitely, I'll send you some videos in a recap e-mail processing. You guys today, they are a little long. It's like four or five minute videos. But if you watch those videos, that should give you a pretty good idea of how it works and stuff like that. And then if we need to do a demo, we can do that too. So it's just kind of up to you guys.

--- *Wrap-up ends* ---

CHAZ

46:36 Okay.

ALEC

46:38 Sweet. So this is the last thing I'm gonna show you today. So I'm gonna show you how the tech could report or repair, how that gets back to the office and then how it looks for the customer. And then if you guys like this, my guess is that we'll probably set up a second meeting. So I'm gonna go ahead and go through this real quick here. So let's say your technicians on a job and he finds a deficiency. Now, if your technicians are like the technicians that, you know, we work with, typically, they don't like to do a whole bunch of writing or typing. So we can go in here and put a simple description of what we found. So I'm gonna say that I found a broken compressor... from here. We can add some attachments so we can record any audio memos. We can take any pictures, stuff like that. The reason this is important is that our highest performing customers typically put about three to five pictures on the quote because at the end of the day, these customers are hiring you because they don't know how to fix their H back equipment. And sometimes, you know, verbiage

and stuff like that. They're not really good to understand it. But if they see pictures on why this broken compressor needs to get fixed, your chance of getting a faster response or more communication from them is typically a lot higher. So they can go in here, take any pictures you can see here that I need to clean. My laptop looks pretty dirty.

CHAZ

47:57 Me too.

ALEC

47:59 It's one of those things right? Where it's like you look at it like I'll do it tomorrow but just never quite makes the top priority. Especially, I'm sure you're definitely out and about more than me especially when you're taking it to the office, working from home a little bit, going library now, all every.

SHANE

48:17 Sure.

ALEC

48:19 So, yeah, so they can take any pictures they might wanna take. And then from there, it's pretty simple. So we're gonna select the severity. So I'm gonna say this is an inoperable deficiency. Now similar to when you get your car service, you know, when you go to get your car service, the technician might tell you, hey, you need to get this fixed today or you might say like, hey, this isn't bad, but in six months or a year, this might be something on your radar. You have similar options here as well. But I'm gonna say this is inoperable just for today's. Example... you then can tie it to a specific piece of equipment. So this is what's gonna help you build out that history notice too that you can tie it to a specific asset. So you can either select a specific asset or tie to the building if for whatever reason, we don't know what it is. And then we can select the status of it. So, I'm gonna say that, hey, this is a new deficiency something we just found today. And basically, we need to get this quoted out. Now, we could add a proposed solution that's optional. I'm just gonna leave it out today in the interest of time. But essentially, what happens from here is once that technician reports that deficiency instead of you guys having to receive a text or a, it being in various areas or it being an e-mail text, stuff like that, you'll all see it in service trade and specifically where a lot of our customers like to see it is, we'll send you an e-mail in real time. So it's gonna tell you that, hey, Alec found this deficiency at this location here's the link to start, go ahead and start quoting it out. So instead of having visibility on that at the end of the day or a couple of days later, a lot of our customers are able to get that quote out that day if not the next, depending on the part situation or stuff like that you go to.

CHAZ

50:11 If you, so if you write up a deficiency like that, you also have to write it like in your actual job notes, you know, like, hey, completed maintenance and found these items.

ALEC

50:24 No, no, not necessarily. I mean that's one way to look at it, but typically our customers are using like the comments and attachments just for that job, the deficiencies an extra opportunity. So they'll log that deficiency, but they won't have to log in again. So if he logs a deficiency, he won't have to go into comments and be like, I found this because you'll be able to see it because on the back end, there's a specific spot for deficiencies, and our customers typically like to keep that separate because it's kind of a separate thing, right? Like a, an additional pull-through opportunities a little bit different than like, hey, this is what I did if you get what I'm saying?

CHAZ

51:01 Yeah.

SHANE

51:02 Just...

CHAZ

51:02 A...

SHANE

51:03 Flags it flags it different. So you can, you know, really call it out and really take that opportunity to... I guess repair.

ALEC

51:14 Yep. Exactly. And, you know, obviously some of these to your customer might just be like just go ahead and fix it. But a lot of the ones that are hired ticket, they're probably gonna wanna quote. So I'll definitely show you what that quote looks like. But in short, they're not gonna have to like do any double data entry here. They're not gonna have to report a deficiency and leave a comment. They just simply do the job, report the deficiency. And then as far as clocking out... you have a couple of options with this. So let's say that we did not complete the PM today for whatever reason. If I click next year, this is a feature that was requested by a lot of our customers. You can notate why this job wasn't complete. So maybe we're waiting on parts or maybe, you know, we need customer approval or something else. That way, you know, when we go back, we understand what we need to get to go back. And we also aren't thinking like, hey, why do we not complete this? You know? And it's pretty simple to notate... now if they did complete the job.

ALEC

52:23 The options that will display here is you can put in your custom task list. So if you want them to leave a picture for every work order before clocking out, they can do that. If you want them to leave a comment after every work order, you can do that as well. So you have some options to, on what you can require them to do before clocking out. Now, that specific question Chaz asked earlier, I'll definitely ask my technical team that about the, if it's not associated with a piece of equipment, can they associate it with it before clocking out to get you an answer on that? But you do have some options as far as how that would look if you want the require put some digital handcuffs on them, so to speak. Does that make sense?

CHAZ

53:05 Cool. Yeah.

SHANE

53:06 No.

ALEC

53:08 Sweet. So if you just give me a sec, I'm gonna go ahead and I'll stop sharing my screen here. And then I'm gonna start sharing my screen here. And then I'll show you guys how we'd write up a quote, how that looks. And then we'll kinda go from there since I know you got that meeting soon. So if you just give me one sec.

CHAZ

53:26 I was noticing that it seemed like it was taking a little bit to load. How often does that happen?

ALEC

53:33 Not not often are you guys using are?

CHAZ

53:35 Or?

ALEC

53:36 Apple devices.

CHAZ

53:38 Mostly apple, to be honest.

ALEC

53:40 So, complete transparency, our cto, chief technical officer, he does say that ServiceTrade does work a little bit better on apple than android, but as far as that functionality, I don't really have too many issues with it. What I will say is obviously, when we roll out new features, like for example, that tasking like, hey, when you clock out of a job, not take this before you clock out. Obviously, there's a little bit of tinkering. So we really get it dialed in. But you saw a lot of the other stuff like deficiencies, stuff like that.

CHAZ

54:16 Yep.

ALEC

54:16 Was pretty clean. And then it is a.

CHAZ

54:18 A little...

ALEC

54:18 Bit better of an experience on apple, but I do all my demos on my android. I've sold deals where the whole department used android, haven't really heard any issues. So, it's usually pretty straight.

SHANE

54:31 So, does your, does your devices hold the data if they're in an area where there is no service and then upload later or no?

ALEC

54:44 Yeah, yeah, great question. So, in short... we do have, so we heard that from a lot of our boiler companies where we're in a basement. We don't have service. So you can work on the job, do everything you need to do. It just doesn't go back to the office until you get signal again. So as long as your tech loads up his jobs for the day, when he has signal, you should have no issues there.

SHANE

55:09 So, to answer that question, they can upload all the information in the basement. They could do their whole work order. When they get into service, it automatically uploads.

ALEC

55:19 Correct.

SHANE

55:20 Okay.

ALEC

55:21 Just uploads when they get service. So when they get service again, that's when I'll upload now, if they have wifi or something like that, obviously it upload.

SHANE

55:30 Yep.

CHAZ

55:31 Cool. Okay.

ALEC

55:33 Cool. Well, let me start sharing my screen here. So this is basically how a work order will look like when it comes back to you guys. So you can see here the

appointment was complete. You can see here that the service was complete. You know, you can see all the information like the parts labor items use, if your tech added any or maybe adjustments. They can see that. And then we also have these deficiencies down here. So these are where the deficiencies live. Those also come in via e-mail as well. And I'll show you what that looks like. This is gonna look something like this. This is gonna tell you, hey, Alex found this deficiency at target. Pittsburgh here's, the unit it's pertaining to here's, the description. And then if we click on this deficiency here, this is what's gonna take you right to the link. You need to quote it out. It's all gonna live in the same place. It's going to be unified process instead of things being scattered.

CHAZ

56:41 So, let's say you do first maintenance and let's say you find five deficiencies. Is it possible for the customer to kinda see all the deficiencies on one?

ALEC

56:51 Page, like on one quote?

CHAZ

56:54 Yeah, either on one. Yeah. So, I guess these efficiencies the customer doesn't see, right? Only when we turn them into a quote that what you're telling me?

ALEC

57:04 Correct.

CHAZ

57:05 Okay.

ALEC

57:05 Now, now, we do have a customer portal. It is a Wordpress plugin where if you want your customer to see all the quotes or all the deficiencies you guys ever logged, obviously, it's permission based that's an option... but really the customers only seeing what you want them to see. So if they reported five deficiencies or maybe only two were worth quotes, then we send them those two quotes. You can put it on one quote. If you wanted to... kind of up to you. I mean, do you guys send a lot of deficiency quotes with like multiple repair opportunities on it or how does that typically go?

CHAZ

57:44 Yeah, typically, any like let's say it's the first time we've gone out to ability to do maintenance. There's usually like contactors capacity or small things, right? I, you group all the small things from multiple pieces of equipment onto one quote for, you know, so we can take care of, you know, a lot of small issues all at once and then we'll focus on just the bigger issues.

ALEC

58:07 Yeah. And you could absolutely do that. So what I'd recommend is just if that's kind of your process, if you see a lot of small issues, you know, just make sure that, you know, you send out that one quote and then any other outstanding deficiencies, just mark those as you've kinda gotten taken care of.

CHAZ

58:25 Okay.

ALEC

58:26 But to, for this to we'll just simply click, add a quote and we'll click create quote.

CHAZ

58:31 Hey... Alex, let's just let's stop here. So we have time to kinda, you know, wind down.

ALEC

58:42 Okay.

SHANE

58:42 Yeah.

ALEC

58:44 Yeah, absolutely. So, what are you guys thoughts on this so far? I really wish we were able to get through the quote and I could show you how you could put that together and send the customer. We can definitely go through that next time. But what are you guys opinions on service trade so far? What do you like about it? What's kinda what's kind of you guys think about this is first look?

ALEC

59:08 For me.

SHANE

59:08 I...

CHAZ

59:08 Think it's just, okay. I think it's part for the Chorus? The, the time tracking piece is gonna take a little work on our end. It's not, it's not really much different than what we're doing now. I don't know. I need to think about it to be honest with you, but it does look pretty clean.

SHANE

59:33 Yeah, it seems clean. It seems intuitive. It seems to chat this point. Okay? As well to me curious what, the quote looks like from the deficiency perspective, and then also what the customer full experience looks like. When we recap a job is the

one that really stands out for us is how the jobs get recapped. And I think there's opportunities on our end. Obviously to, you know, change that and then follow right up behind with proposals. So, yeah.

ALEC

1:00:13 Gotcha. And anything about this that took it from good to? Okay. Was there anything that you looked and you're like, I don't know about that?

SHANE

1:00:24 It's just kind of a feel thing for me. I wanna say there's one specific thing that says, okay... I think from a functionality standpoint, it's probably pretty on par with where ServiceFusion is right now, maybe a little more elevated in terms of the way you do the pull-through work, but outside that is probably pretty similar... right?

ALEC

1:00:56 You know, I definitely understand that. I know we gotta go soon, but I mean.

SHANE

1:01:00 We...

ALEC

1:01:00 Really scratched the surface today, we didn't really get through a lot of the platform. So, I mean...

CHAZ

1:01:06 I...

ALEC

1:01:06 Think that taking one more meeting and just seeing the rest of the platform and then if you guys still feel that way, we can shake hands and part ways.

--- *Wrap-up* ---

ALEC

1:01:14 But some of the things like customer facing stuff we didn't really have time to get to today. I go through management, some of the stuff, that is a little different than maybe some of the stuff you've looked at.

CHAZ

1:01:27 Yeah, we got to run, but send me a follow up e-mail with those videos and recommendations. And if there's a link to your calendar so I can jump on there?

ALEC

1:01:35 Okay. Sweet. Yeah.

CHAZ

1:01:36 We...

ALEC

1:01:37 Yeah, you're good. Yeah, I'll make sure to click a time by Wednesday because my calendar is always changing. So if you could just pick a time that works for you guys, I'll send you some times where we could schedule a follow up demo. Does it sound good?

CHAZ

1:01:49 That's be amazing. You.

ALEC

1:01:51 Yep. No problem. You guys have a good one.

SHANE

1:01:53 Me.

CHAZ

1:01:53 Too. My friend. Bye.

ALEC

1:01:55 Bye bye.

The End