# ServiceTrade Demo with Industrial Commercial Systems

Dan Waggoner with Industrial Commercial Systems
Recorded on 4/13/23 via Zoom, 59 min.

# Participants

### SERVICETRADE

### Dan Waggoner
*Territory Manager*

### Clint Mathis
*Field Manager*

## INDUSTRIAL COMMERCIAL SYSTEMS

### Christy Velador
*Controller (accounting contact Sage300)*

### Robert Alvarez
*Vice President, Service/Special Projects*

## OTHER

# Topics

# Transcript

### CLINT

0:02  Yeah, started talking with Philippe back in the day.

### DAN

0:06  Yeah, I think you were even on site at one point.

### CLINT

0:09  Yeah. A couple of times.

### DAN

0:12  Cool. Cool.

### DAN

0:25  Hey, Christy. How are you?

### CHRISTY

0:29  I'm good. Thanks. How are you?

### DAN

0:31  Doing well. Thank you. My name's Dan, this is Clint. I've got with me as well.

### CHRISTY

0:35  Nice to meet you guys.

### ROBERT

0:36  Hello, you guys hear?

### DAN

0:40  Yes, sir.

### ROBERT

0:42  Awesome. Thank you. Sorry about that. I can, I didn't have Zoom installed this new computer yet.

DAN

0:48 Well, it seems like you got to figure out pretty quickly. Zoom can be a wild animal sometimes.

ROBERT

0:53 There we go. We're working to.

DAN

0:57 Awesome. Well, good to meet you, Bob. I've got Clint here with me today. He used to be actually the field rep in California. I think he even met with you all down there, and maybe not you all specifically, but with industrial commercial a couple of times last year.

--- *Purchase decision* ---

DAN

1:13 So he offered to jump on the call with me. I figured he could probably add some value. So that's why I've got him here.

ROBERT

1:19 Great. No, that's good flip. I don't think is going to be able to make it. He said he was kinda tied up. He was trying to catch up on some things, but yeah, he also mentioned that he had a name with somebody that's probably Clint that he was probably referring to. So that's great.

--- *Purchase decision ends* ---

DAN

1:34 Excellent. And great to meet you as well. Kristie. I don't know if you wanted to introduce yourself officially.

CLINT

1:40 Yeah, no, I just give you a little breakdown. I used to be with service trade went on a hiatus for a little bit to help one of my friends out on one of his businesses and then just recently joined. So I started back up actually on Monday. So just wanted to jump on the call. I'm familiar with Philippe. We've met quite a few times in person and stuff and been down to the office there. So I just wanted to jump on the call and see if I could be in any of assistance.

ROBERT

2:08 Wonderful.

ROBERT

2:11 Well, great. With that, my.

## DAN

2:13  Plan really for us today. What was to, I'd like to gain a better understanding of I guess your initiatives with this new location, right? And how you envision this rolling out over the next few weeks months and identify some of the top priorities as it relates to your field service management software needs.

*--- Purchase decision ---*

## DAN

2:32  And then we could jump right into the platform, talk about those topics and we'll walkthrough some of the workflows and service trade, answer questions for you throughout depending on where we end up. And obviously, depending on the time as well. We talk about next steps towards the end there and what else needs to happen in order for you all to make a form decision. So if that sounds like a decent plan, we can get into it.

*--- Accounting integrations ---*

## ROBERT

2:59  Sure. So I mean as far as... where the history has come and, you know, Clinton and referring to the conversations with Philippe, my understanding is that, you know, we're currently on Sage 300. I think you guys are aware of that and it's you know, it's a little cumbersome, you know, it's more of, I think it's probably designed more of a Construction software than necessarily a service to a, I mean, it does have a service module that we are using, does have agreement module. We're using some of those pieces but, you know, the reporting aspect of it is very difficult. It's all done through Crystal reports and stuff like that. So it's just, it's very cumbersome and we're looking, I think for a tool that's a little more like be a little easier to use a little easier on the field.

*--- Purchase decision ---*

## ROBERT

3:44  And so this is an opportunity for us to have the conversation. It was in the plan already for this year to consider making a move somewhere. So this is gonna give us opportunity to kinda let me catch up to hectic, where I wasn't dealing with you guys. I had never heard of your program before so I can get a chance to wrap my head around it as well and then potentially use it in the new office.

*--- Implementation and ongoing support ---*

## ROBERT

4:08  I mean, if it's easier to, you know, it's probably easier to start a location on the tool than migrate, you know, the hundreds of customers we have and, you know, everything else immediate immediately. So give us kind of a test basis for it, let's.

## ROBERT

4:26  Sure. And.

DAN

4:29 You mentioned, you know, getting something in place as soon as possible would be ideal, but as far as the new office roll out, is that, are you guys currently like underway with that or is there a date that you're planning on, you know, actually launching and taking jobs and such from the Fresno area office?

*--- Implementation and ongoing support ends ---*

ROBERT

4:47 Yeah. So we already took, we just sold our first customer up there and it's a pretty decent size contract. So we're scrambling right now internally how we're going to separate that within Sage. So it's happening literally this week. I mean, Christie, I don't know if you want to add to any of that.

ROBERT

5:03 But, you know, we're working on how we're going to best deal with that situation. Okay?

DAN

5:14 Christy, did you want to add anything to that or?

CHRISTY

5:17 No, I mean we have the SM module set up right now. So for now, we're just, we're gonna have a separate division set up that way until we get something else in place that's kind of what we have to do right now.

*--- Accounting integrations ---*

DAN

5:32 Okay. So the service manager module with Sage... is there anything else that you're using along with the service management module? Sometimes I get a little confused as far as how Sage goes with that, there's, Sage service operations, and then the service manager module. Do you have both of those in place?

*--- Purchase decision ---*

CHRISTY

5:53 Both. Yes.

DAN

5:54 Okay. And Christy, are you involved a lot with the day to day activity with those two programs?

CHRISTY

6:03 Not a lot. No.

DAN

6:05 Okay. I was just curious if there was anything specifically that you were interested in seeing today or if there are any, you know, headaches or areas for improvement that you.

*--- Accounting integrations ---*

CHRISTY

6:17 No, I mostly just need to make sure that everything's gonna integrate with Sage in the back end. So whatever we do decide to replace the SSO and the SM, with that, it integrates smoothly with Sage? Because that's where I'll come in.

DAN

6:34 Okay. Gotcha. And as far as having things integrated currently with the systems you have in place, are there any hiccups there or is everything just smooth sailing?

CHRISTY

6:52 Integration wise, it is because it's all, you know, meant to come together but I think reporting wise is where they fall short on what they can really see and what they can really do with those exterior modules?

DAN

7:06 Okay. And what would be, you know, a minute ago when I spoke with Bob, he also mentioned reporting and I understand like the standard reports and stuff. I'm curious if there's any specific types of, you know, reports that you all want to have.

*--- Accounting integrations ends ---*

CHRISTY

7:27 That's really between Bob and Philippe, what they wanna see on those ends. I'm just, I mean, I'm looking at everything on the GL side. So as long as everything from there comes into GL, where I'm seeing it okay from the overall company standpoint, that's what I'm looking for.

ROBERT

7:43 So, Dan, what I'd love to see is, you know, profitability around customer around work order and really around your maintenance contracts. And I think I saw that you guys can provide that information, tracking maintenance contracts for the budget auto, generating work orders and all that stuff that's going to be a big key to being successful with this process.

*--- Purchase decision ---*

DAN

8:07 Excellent. Excellent. Yeah, perfect. Well, that gives me a great idea of where to start here. As far as you all's decision making process. I know that, you know, life

really liked the platform previously and he had mentioned a few names that kinda needed to sign off on things. And you mentioned today, you know, it's kind of an initiative for this year for you all. Who ultimately though, would there be anyone else involved in the decision making process?

CHRISTY

8:37 I think ultimately, it'll be for the executive team to go ahead and decide when we're going to pull the trigger on it. We had originally had it slated for somewhere around the third quarter of the year. So if we need to move it up earlier, it would just be a matter of presenting... the pros and cons for the executive team.

DAN

8:59 Okay. Have you all implemented anything like this recently? Or I guess trying to understand the process for what they might be interested in and what kind of questions that they will need answered from you all. So I can, you know, best equip you all.

*--- Purchase decision ends ---*

CHRISTY

9:18 Mostly cost versus cost savings. Okay?

DAN

9:29 Gotcha. All right. Well, let's see as far as anything that I missed or anything that you want to definitely point out? I know we talked about preventing the maintenance contracts, right? And we'll take a look at the workflows but reporting and understanding having visibility over your customers accounts, work orders. So we'll walkthrough that anything else that I'm missing that you wanna make sure?

*--- Access to information ---*

ROBERT

9:55 I mean, what the mobile tool looks like from a technician field standpoint would be important to me as well and how, you know, if it's cumbersome or easy to use, and, you know, how you guys do with that even quoting? I know that, I think I read you guys have a quoting piece to that as well. So I wouldn't mind seeing that.

*--- Paper process ---*

DAN

10:12 We will definitely take a look at quoting absolutely.

DAN

10:19 Anything that you wanted to?

CLINT

10:21 I mean, I'm just looking over some old notes that I had in here. So, yeah, same type of stuff that's that you guys are talking about right now. I know the quoting was a big one with Philippe just because right now it was kinda cumbersome that requires, you know, multiple steps right now.

*--- Deficiencies ---*

CLINT

10:38 So I think that's going to be important to show just how easy it is to be able to, you know, record that efficiency or a problem that's out in the field. And then how, you know, you guys can do that in the back office right away. So, yeah, we'll go over that.

*--- Deficiencies ends ---*

DAN

10:55 Right. Well, and just to double check, I was almost sure maybe I've asked already, but neither of you have actually seen ServiceTrade, is that right?

CHRISTY

11:05 Correct.

ROBERT

11:06 That is correct.

DAN

11:08 Got it.

CLINT

11:08 Like out there, and I don't know if they're still part of the organization. But the last one we did in person was obviously with Philippe and then modemitro and Jordan.

*--- Purchase decision ---*

CHRISTY

11:20 Yeah, they're still here?

CLINT

11:22 Yeah, perfect.

ROBERT

11:23 Yeah. Yeah. Filippe had recommended this one and another option in a meeting the other day and I, you know, so I was starting had a little bit of time to look it up

and that's why I reached out to you because we're gonna work together on it. So I wanted to try to catch up a little bit, perfect.

DAN

11:40 Perfect. Well, we'll get you caught up here. Yeah. And I did mean to ask what else are you looking at?

ROBERT

11:49 I'd have to look at my notes. Hold on. I'll get back to you on that. I have to take me a second to get to it, but I'll let you know. Okay, sure. Got it. BuildOps is what he was looking at.

DAN

12:02 Okay. Gotcha. And are you guys doing a, planning on doing a demo with them as well?

ROBERT

12:09 I haven't yet, no. I was actually more impressed with what you guys had to offer on your website, at least at this point. So I figured I would start here. Okay. Yeah. Well, I guess.

*--- Type of work ---*

DAN

12:19 Got one last question now and what was most impressive to you on our website?

ROBERT

12:25 It was the reporting and it was the maintenance agreement tracking. That was the, that caught my attention. I, I've been involved in a lot of different service tools over the years and managed a lot of different service businesses in the last 30 years.

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

ROBERT

12:37 So... these are some of the things that I typically would use and spend most of my time in and you guys highlighted that really well on your website, so.

DAN

12:48 Excellent.

CLINT

12:50 And do you have access to the quick site with let's make sure we showed Bob that as well because I think that was a huge thing. Just my memory being jogged when you brought that up by the EPA was really impressed with as well. Is our quick

site being able to show, you know, there's key performance indexes and stuff. So I think that would be important to show.

ROBERT

13:14 Yeah. I mean, I don't know.

--- *Accounting integrations* ---

ROBERT

13:15 I've never used the Amazon quick site feature, but like with my last company, I actually developed and rolled out an entire PowerBI you know, and an integration. So that was a lot of fun and the information you can get out is just tremendous. So I'm a big fan, a big fan of data analytics, perfect, absolutely well being that.

--- *Implementation and ongoing support* ---

DAN

13:39 First, you know, introduction with service trade. I did want to start with a few slides. Probably take us about three hours to get through these slides and...

ROBERT

13:48 But...

DAN

13:49 Now, but just to kinda understand where we're coming from, right? And where we're headed, make sure it aligns with you all goals.

--- *Type of work* ---

DAN

13:56 So, without further ado, right? Service trade does work with commercial and industrial service contractors exclusively. We don't work with residential providers. So that's one of the things that makes us a little bit different when you're looking at software providers, our customers.

ROBERT

14:12 Skilled...

DAN

14:13 Contractors, skilled labor. We do not work with the maintenance fruit or I'm sorry, not the maintenance through the landscaping cruise or bug guys, right? So folks that are doing the type of work that you all do, you might recognize a few of the names on screen here. Obviously, we prioritize recurring services and inspections and then repairs, installs, projects, service trade handles those as well. And the customer service experience is something that's very important to our company.

DAN

14:38 So I just given and we'll walkthrough some of the ways that service trade is able to, you know, improve the way that you give your customers service today. As you'll see with a lot of software. I think, right? We want to get full visibility over your work that's being delivered in the field, be able to plan ahead and just have real time information from the field to the office to the customer, right? So put all of your data under one system. Is the goal here, remove touch points between different steps and just get the most out of what you have right now. But really the main portion of what service trade does for its customers and the biggest impact that we make is how we're able to help them grow. And this is our mission statement, right? When I help you be more valuable to your customers and grow and growing is really what it's all about. I've really simplified the process here for essentially your tech going out to a job, finding an opportunity for repair, recording it, getting the quote to the customer, you get approval, you create that service ticket again, right? That's kind of the vicious cycle of the workflow. And we actually studied over a 1,000,000 quotes in service trade over the past year and a half two years. So data from 2021 and 2022 and what we found was for our top performers versus our bottom performers, quote approval rates didn't make much of a difference here as far as the overall growth, right? Top performers growing upwards of 40 and 50 percent bottom half performers around 10 percent. So the quote approval rate though pretty side by side here. What was interesting to find out was that work orders with identified equipment issues. So that's where the top performers were starting to separate themselves, they were just simply recording more efficiencies as we'll call them in service trade those repair opportunities with the mobile application. And then the third graph you're looking at here is those identified issues being converted to quotes. So top performers that are growing their service revenue by 50 percent or more. At times we're at a five X split really outperforming those bottom half performers as far as identifying the issues reporting them and getting the quote in front of the customer.

--- *Deficiencies* ---

DAN

16:56 And this is what that quote will look like through a couple of very simple processes, right? Comes from the tech and the office receives a notification to generate a quote with the information from the technician, including pictures videos in a one click approval process for the customer.

ROBERT

17:17 That's nice. Convenient.

--- *Deficiencies ends* ---

DAN

17:22 Excellent. Excellent. So, it's really pull through revenue, right? And it sounds like you all are very big on and from what I've read, you know, the notes and from speaking with Philippe, you guys are big on, you know, maintenance contracts?

ROBERT

17:36 Yes, that's definitely the plan.

DAN

17:38 Excellent. Excellent. Well, well, that's exactly what we want for our customers, right?

*--- Customer engagement ---*

DAN

17:43 Maintenance contracts, planned work easier to operate on than reactive work obviously. And so we want to help you maximize the value of those contracts for your customer and for yourself. So with service trade, adding an additional repair that you're winning through the process of that reporting in the field, in the tech, making it easy to quote out and easy for the customer to approve, right?

*--- Pricing ---*

DAN

18:07 Let's say you're winning just one additional repair per week per tech, which is pretty low ball number. To be honest, we expect you to win much more than that. But I can add up very quickly as far as when you're looking at cost analysis and speaking to the executive team, right?

*--- Customer engagement ---*

DAN

18:24 Thinking about this process and the impact that has on your bottom line, a quick 126,000 dollars in profit over the year.

DAN

18:35 The second portion of our platform, like I mentioned, we're big on the customer communication, right? Visibility, interaction with your customer online engagement. So this is a service report with service trade, easily access 24 seven from the customer and quickly send out this report during a job after a job.

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

DAN

18:53 Really whenever you'd like to send out appointment reminders as well, any files, attachment, signatures, alerts that you want to include here will be available for them there. So really just helping provide that visibility. The same type of, you know, reporting and visibility you're looking for, give that to your customers.

*--- Customer engagement ---*

DAN

19:10 We're also offer a service portal so your customers can sign on especially with these large maintenance contracts. You might have multiple locations or a lot of equipment that you are promised to keep up and running, right? So they're able to take a look, log on through your website, look at all their locations, assets, any previous deficiencies, quotes, outstanding invoices, request service from here, but help you become sticky to them, right?

*--- Customer engagement ends ---*

DAN

19:37 Giving them access to all that information and they won't even think about leaving for somebody else. And then the part that you've mentioned several times and we'll definitely get into service trades or product is designed in a way and the model of our platform is designed to collect the data that you need for these reports, right?

*--- Customer engagement ---*

DAN

19:57 So just throughout your day to day activities and we do use Amazon quick site for data analysis, got some dashboards built in already, and you can also customize create your own, monitor your revenue growth, right? See what's going on, day by day, tech by tech, and make sure that you're where you wanna be and that you have the necessary information to make corrections if you need to.

*--- Accounting integrations ---*

DAN

20:24 Any, anything stand out to you there or anything that you want me to? Any questions before we move on here?

ROBERT

20:32 No, I mean, I just, I love the fact that it just feels fresh. I mean, most of these service tools that everybody's using are so old and outdated is, has a nice feel to it, which is very nice to see.

DAN

20:46 Excellent. Excellent. Yeah, we're about 10 years old. So always making updates and improvements as well. So won't be seeing any of the 1990 dos type software though on here.

ROBERT

20:59 So...

DAN

21:00 If I can use it, anybody can think.

ROBERT

21:02 Using fill connect tied to vista Viewpoint, vista and this is a major upgrade from that perspective.

CLINT

21:10 Just a little side note. I used to work for field connect back in the day. Yeah. Yeah, I actually love field connect to come to service trade. And yeah, it was night and day.

ROBERT

21:23 Yeah, no, it's I mean, they, they're good to deal with. I mean, but it's just the product. It just looks like it was made 20 years ago and there wasn't really a whole lot improved on that.

*--- Accounting integrations ends ---*

CLINT

21:32 Yeah. And there hasn't been, I still have buddies that work over there.

ROBERT

21:37 Yeah. At, was his name sear?

CLINT

21:41 You talk about?

ROBERT

21:43 No, it anyhow.

CLINT

21:47 Yeah. They're Samir, they're say... I'm trying to think with vista you probably would have worked with Alan Shera.

ROBERT

21:57 Allen, that's yes, sure.

CLINT

21:59 I think JIRA.

ROBERT

22:00 JIRA. There you go. Yeah. Said, Adam, it was Alan. Yeah.

CLINT

22:04 Yeah. Yeah. He's a good friend. I just talked to him two days ago.

ROBERT

22:07 Yeah, I was like in his inbox and on his phone with him every month for the last couple of years. Yeah, great guy. Yeah, good guy. Anyhow sorry to side track the meeting here.

*--- Access to information ---*

DAN

22:17 All right. I'm glad to hear that Allen is doing very well. So, how to open this up here. And what we'll call the office view of service trade, right there is the website, log in on any browser, as long as you have internet access, you can log in from anywhere at any time.

*--- Recurring maintenance ---*

DAN

22:34 And then we'll look at the mobile application as well. Wanted to start front and center though, right here on one of our customer, the maintenance contract, right? So, we do have a tool which I wanna talk about at some point. I'm not sure if we'll have time today, but that customers can use for actually selling the maintenance agreement, right? It's called Northboundary. Once you sell that agreement, you can push it straight into service trade to where, hey, all the services are, set up. The equipment that you've recorded for that contract is set up prices rules, and then manage it through service trade.

ROBERT

23:07 Yeah. I'm familiar with Northboundary, yet. I don't think we'll be going down that road, but I am familiar with.

DAN

23:12 Okay, great.

ROBERT

23:15 Use it at limbo.

DAN

23:19 Gotcha. All right. Well, so, this is a contract for top golf corporate. We've got about six locations here that we service for top golf. You can see the basics of the contract here. Immediately. When you open up this dashboard, you can see when it's valid till, right? The expected revenue expected margin and your actual man.

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

ROBERT

Nice.

DAN

23:45 So that's front and center, any time you want it with any contract for any of your customers, you can see all the invoices that we have sent... the prices, the rules, contract rules as far as their... payment terms, administrative charges, additional charges, mark up rules for the customer.

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

DAN

24:08 Yeah, great. What was that now?

ROBERT

24:11 I said that's great. Easy to see.

DAN

24:14 Okay. Terrific... terms and conditions and such as well. But all right. Here for you... front and center.

ROBERT

24:27 Are the work orders there as well?

DAN

24:29 They are not. So this is the contract and the customer's top of corporate office, right?

*--- Recurring maintenance ---*

DAN

24:34 So, let me just kinda take us through the data model here a little bit the, so the corporate office, right? We've got six locations and this contract is applied across all of these locations. You could have it applied to a singular location if you'd like to. In this case, we're doing, you know, the contract across all of these locations that's the pricing they're expecting. But each location probably has different equipment, probably has different needs specifically, and different contacts and such. So.

*--- Assets ---*

ROBERT

25:00 Okay.

DAN

25:00 Each location is also going to have its own page and that's where you'll find services, your contacts, any information you need to know about delivering service at this location, all of the job history, the assets that you service... the contract, of course, quotes, any comments necessary for that specific location attachments.

*--- Recurring maintenance ---*

DAN

25:27 And so you mentioned as far as generating, you know, auto generating work orders, right? So the services and this can get a little bit jumbled up here in my demo account. I don't always do a good job of completing things on time but you, you'd either have recurring services or one time services. You can see both of those are here under this page. Currently, I've got some repairs that have been approved, but in general, what we'd be looking at are these recurring services. So when you add a service to a location, think of this as a set it up and forget about it.

*--- Quote templates ---*

DAN

25:55 Now, you can have as many service templates as you'd like to. Let's say we've got our hvac permitted maintenance template. This is the standard charges. It's gonna be based off the pricing from that contract. Now, you can select the asset that will be servicing or a group of assets.

*--- Recurring maintenance ---*

DAN

26:13 If you have let's say 15, 20 different refrigeration or hvac unit. You can even set a preferred technician if you'd like to give it a scheduling window for this. We've got a quarterly. So every three months, it's gonna give you the whole month to schedule that out if they have a preferred time and they want it done, you know, the first Monday at eight a M of every quarter, you can also set that to be the case. So once I've saved that service, like I said, it's a set it up and forget about it. And what you'd be able to do is in your service opportunities dashboard run a report for any in various filters, right? What type of work you're looking for? But basically just running a report for anything that you in the time frame that you're reporting on. And you can auto generate all of the work orders as you see fit for that... time period. So, hey, if I'm looking at June, I wanna see everything, do in June, wanna go ahead and run that report, see what kinds of parts we need, see what kind of hours we'll have, right?

*--- Assets ---*

DAN

27:13 And get started on that. And this is what you'll end up with, right? So I've got a job here. We're going to be servicing three different pieces of equipment for this customer. It is quarterly service. And this is where all the information is gonna come back to you from the mobile app and we'll be getting into a lot of the details here on the mobile app as far as equipment assets, comments and such. But you'll see here the comments from the location level came over to the work order. So anything as far

as scheduling note, billing note, and then technician note, every time you schedule a job at this location, those will automatically come over. So everybody's got the right information.

#### DAN

28:00  Before we jump out into the field, is there, are there any questions or anything that stood out to you here?

--- *Access to information* ---

#### ROBERT

28:07  No, it looks pretty straightforward.

#### DAN

28:11  He didn't like.

#### ROBERT

28:14  No, I mean, like I said, it's it looks very windows friendly, internet friendly. All the information's there. You know, you got links you can click on. I mean, it's just a major improvement from the last couple of services that I've used.

#### DAN

28:32  All right. Well, we haven't even got to the good stuff yet. So I think we're off to a decent start. So I'm gonna jump out here to the mobile application and everybody see my iPad at this point?

#### ROBERT

28:47  Yes.

#### DAN

28:48  Excellent. So, this does work on apple and android devices. So phone or tablet as well. So you can use it on whatever the technician is comparable with. I am on an iPad today. So we've got our work order and pretty simple layout for the technician. What I'll do to start is clock in as in route... and I'm gonna notify the customer.

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

#### DAN

29:13  So this is one of those customer service type... things that falls into service trade here and let's see there you are. Christy. So I'm gonna send you a quick notification that will hit your inbox any moment, gives you a nice picture of who to expect for the service call.

--- *Tech On-site* ---

DAN

29:28 Put your brand in front of the customer, right? More often than just, you know, when something's broken or when you need money.

DAN

29:38 Once the tech arrives on site, they'll just move over to fucking on site. This is also going to give you that full visibility from the office view of, hey, where are my techs?

--- *Assets* ---

DAN

29:46 Are they progressing throughout their day as they need to be? So we've got our services that were here for today, and each one of those services is going to be assigned to an asset, right? So we've got some AC units here for this appointment, working on three different AC units. Now, I am able to look at any related equipment or all of the equipment on site. If I need to, you know, make adjustments or report something for any of the equipment that we service... or simply take a look back at the history of that equipment. So when I open up one of these assets here, you can see any previous efficiency specifically related to that equipment.

--- *Deficiencies* ---

DAN

30:25 So, hey, what was the last problem with this piece of equipment, this asset and what's the status of that, right? It looks like we verified quite a few recommended repairs. None of them have actually happened. You'll also see fix whenever one was actually acted on.

ROBERT

30:42 Well, okay. And those are.

--- *Assets* ---

DAN

30:45 Have the documentation, the videos, pictures as well. And you can actually add attachments directly to the asset. So this would be something like a location map. Where exactly is this piece of equipment, videos, PDF, user manual, equipment guide, anything necessary for the technician that's going to help them be as effective as possible?

DAN

31:15 Then you've got your basic logistics here. As far as the equipment goes, different items that you can add here. Now, you'll notice that there are, you can actually, there will be more fields if you need them to be, but they won't be required fields, some types of equipment. You know, there might be 300 different fields that you can add data to. But for service trade, we don't wanna, we wanna make sure we're not

slowing you down when you're adding that equipment. So add what's important to you. It's save and that's what will show up for your asset... service history is also going to relate back to this piece of equipment. So with contracts I think you mentioned, was it a casino you mentioned to me a moment ago?

ROBERT

31:54 Yeah.

DAN

31:55 Okay. Yeah. So, I'm sure that they've got plenty of equipment that you all be servicing. And this allows you to look at service history the same way with those deficiencies, right? Service history as it relates to the specific piece of equipment rather than saying, hey, the last job we're here, we worked on these 300 pieces of equipment. Who knows who touched this one last. So I can open up a previous job with pictures, take a look at what was done last, what we charge them for, who it was that did the work and understand what we might be headed in for.

*--- Access to information ---*

DAN

32:41 So, I wanna jump into reporting a repair opportunity here before I do that though. Was there anything else that we should take a quick look at with the mobile app? Anything that your texts are required to record or collect?

ROBERT

32:58 No, I mean, I think I'm good. Okay.

DAN

33:04 Any, any feedback?

*--- Access to information ends ---*

ROBERT

33:07 From...

DAN

33:07 Your end?

CHRISTY

33:09 No, I'm good. At this point, I'm just gonna be curious as to how stuff is gonna import into Sage, as far as POS, when they start putting those in and payroll, how payroll is gonna come over and all that stuff.

DAN

33:21 Gotcha. Gotcha.

ROBERT

33:23 Well, hopefully.

CLINT

33:23 We don't bore you.

--- *Deficiencies* ---

DAN

33:24 Too much today and.

ROBERT

33:26 Not sure how much of.

DAN

33:27 That we'll be able to get into, but I definitely have some resources and we can review some of those steps as well.

CHRISTY

33:34 Okay. Sounds good.

DAN

33:36 All right. So reporting deficiencies technician finds an issue. They want to report it so that it can be quoted out to the customer as quickly as possible. And when that repair. So let make this really simple for the tech… compressor replacement. That's pretty much my go to, for these, you probably see a couple of those were looking at the asset there, but these are going to be the same steps every time for the technician. It's gonna prompt them to take photos and video. They can add notes here, notes about what we're looking at. We'll take a quick video as well. You can also include audio clips if you'd like to. So obviously this will pick up audio as well though explaining to the customer or to the office, what's going on and what might be needed. Just gonna label this as the level of severity, right? So this process here kind of like we looked at earlier with the top performers reporting a lot more opportunities for repair, this process really simple to capture just those suggested things. Hey, you're walking by a piece of equipment that looks like in two months, it could be going sideways, easy to document that. Easy to get that back in a quotable fashion for the office. So not only collecting those obvious repair opportunities and efficiencies but also able to collect the suggested ones as well. We'll tag this as inoperable. And at this point, you know, scan the bar code for the asset or type in up here.

--- *Assets* ---

DAN

35:10 At the search bar, it'll drill down and find it based on the serial number. But you're just gonna label the asset that you're referencing here automatically knows

that it's an equipment and that's it just gonna mark this as new.

DAN

35:27 And I will continue moving along with my duties here.

*--- Assets ends ---*

DAN

35:34 So we're gonna pop back to the office and take a look at how this information is now syncing to you in real time and get a quote out to the.

ROBERT

35:42 Okay.

DAN

35:51 Back to screen too. You should see my email inbox.

DAN

36:00 All right. So this is the email that was prompted from Dan's report in the field there. So you can actually set this up to every time one of your technicians reports a repair opportunity, certain people in your office, get pain. So we've got a new deficiency reported. It will show up in the application as well, right? But this can be a nice way. Just a convenient reminder. It takes you directly to that.

ROBERT

36:23 Can you set that up? So like if you have account managers on certain accounts, that certain accounts if they have deficiencies go to certain account managers.

DAN

36:31 That's 100 percent accurate.

ROBERT

36:32 Perfect. Okay.

DAN

36:34 You see here, the reporter is Dan, and for my demo purposes, I've also got the salesperson set to me, but in the case that you want like, so, hey, this account manager handles so a, and, you know, these properties. So any deficiency relating to those properties would be routed to them and they would automatically be assigned as the salesperson.

*--- Deficiencies ---*

ROBERT

36:53 Okay.

DAN

36:57 So initially on this report, I can see the attachment that Dan has added any comments. If you'd added any additional comments, we can see there's no quotes that have been sent out related to this deficiency. Also, it's gonna quickly compile all of those previous deficiencies reported for this equipment. So, hey, we've been reporting the same thing over and over again and it's been fixed over and over again or maybe it hasn't been fixed. Just gives us some visibility to the history of this equipment, make the right recommendation. And then of course, our fresh report here. So all I need to do is generate a quote with this button over here.

*--- Quote templates ---*

DAN

37:33 I'm actually gonna switch this up to... well, that'll be all right. But everything should fall in place correctly here based on Dan's report and the location information if you need to make any adjustments you can, but we're gonna stick with it.

DAN

37:52 And I have generated a quote. So this quotes linked back to that deficiency which is linked to the preventative maintenance job.

*--- Deficiencies ---*

DAN

37:57 So everybody knows where it came from. Also on all of these tabs, you're gonna have a history tab, right? So, history of the deficiency history of this quote now?

CLINT

38:05 No.

ROBERT

38:07 So, where did you put your cost in for the?

DAN

38:10 I have actually not done that yet.

ROBERT

38:11 Okay. All right. Got it. I was like you out of the quote. I'm like I don't see the cost anywhere?

*--- Quote templates ---*

DAN

38:16 Yep. So the similar to the service templates for maintenance contracts and stuff that you might have, you probably got some typical repairs and recommendations that you have. So you can plan out and create as many different... both templates as you would like to as well. So we've got a compressor replacement like this is a good one information, the recommendation for the customer, right?

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

DAN

38:39 And then here's the equipment, parts, labor material that we need. And I'm simply going to apply this to the quote. So your cost and your markup is already been calculated based on the contract in place here.

ROBERT

38:57 And can we do that as a fixed price?

DAN

39:02 And when you say fixed price actually, yes, the answer is yes, I don't know why I was about to ask you a question there.

*--- Quote templates ---*

ROBERT

39:08 Okay. I'm not a fan of breaking down, T NM proposals.

DAN

39:15 Excellent. Yeah, we definitely recommend actually doing fixed pricing as well, but you're also not locked into this template, right? If it's a little bit different, right? Maybe we need to do six hours of labor because of the specific type of equipment or if you need to add a part here.

*--- Quote templates ends ---*

ROBERT

39:34 Okay. Yeah, that's a great tool. I like the concept of this is really well done.

CLINT

39:39 And Bob, just to add something else to that, this is also just for your guys sake to look to see exactly where money's going. But you can give a different detail level for the customer.

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

CLINT

<sub>39:50</sub> So if you see in the upper left right there, there's a drop down that Dan can hit. And so now you can do these different types of how you want that quote to look for the customer versus what you're seeing here, being able to, you know, get granular on that pricing.

*--- Quote templates ---*

ROBERT

<sub>40:06</sub> Got it. Line items and then you have grand total. Okay. So you can pick different versions. Got it. Perfect.

DAN

<sub>40:12</sub> Yeah, exactly. So, I know like a lot of folks, maybe they require the line item pricing, but, you know, if not, it's probably always better to kind of give a little mystery there because where there's mystery there's some margin.

ROBERT

<sub>40:25</sub> Exactly.

DAN

<sub>40:27</sub> So, you have a default setup based on the contract or the location, right? And it would automatically be that, you know, that style, but you can always make an adjustment on the.

ROBERT

<sub>40:37</sub> Okay.

DAN

<sub>40:39</sub> That's it really the last step is just going to be sending to the customer.

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

DAN

<sub>40:43</sub> So, you see, we've got our corporate, our company contacts, right? The Bill to contacts as well as the location contacts here and send this to multiple people. I will send to both of you all and to myself. And we've also got the attachment and comments from the technician easily toggle on or off. So if we got some internal stuff or maybe Dan took a few pocket pictures accidentally, we can easily go ahead and keep those internal.

DAN

<sub>41:13</sub> I'm gonna send this over to you and I'll pull it up on screen here as well. But if you have a device that you're able to open this up on... that would be great.

ROBERT

41:29 Yeah, I can bring it on.

CHRISTY

41:30 Or monitor.

ROBERT

41:33 Quote for repairs, okay?

ROBERT

41:42 Click in view, details, approve a request changes. Nice.

ROBERT

41:51 All right. I'm clicking on the link.

DAN

41:53 All right.

ROBERT

41:59 And it tells you who viewed it. Nice. I like that.

DAN

42:02 It does. Yep. And yeah, it's going to give you visibility.

*--- Quoting ---*

DAN

42:07 It'll also give you notifications in your inbox, if you want to set it up. That way, it's so the sales people can get excited and account managers get excited when folks review in their, the quotes they send.

ROBERT

42:18 Yeah. Does it give you any response if they were to forward it to somebody else?

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

DAN

42:24 If they forward it, it's a great question. It will.

ROBERT

42:26 So...

DAN

42:27 What it'll do, actually, if they forward the link, it'll basically say that Robert is opening it again, anytime anyone interacts with this, it'll be based on the link that was sent to their inbox.

ROBERT

42:40 Okay.

DAN

42:40 That makes sense.

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

DAN

42:41 So, if I forwarded the one that I sent to my cell ordered it around, it would keep saying that Dan Smith opened it. Dan Smith opened it even if it was the people I forward.

ROBERT

42:52 Got it. Okay. Yeah, I was looking at another tool a few years ago and they had it set. So you had to use a password. So when somebody forwarded it to somebody else, they had to get a password created and it then force this, you know, gave us the information, who else was opening it? So if it went to a competitor, you know, you probably were gonna find out who it was, that is interesting. Yeah... but that's a neat process. I like that. And then they can just approve it right from here.

*--- Quoting ---*

DAN

43:18 That's right? Yeah... if you wanna hit the approval on there for me, we can take it from here to the... how you would go about, you know, converting it to a work order and getting it scheduled out.

ROBERT

43:37 All right, approved.

DAN

43:42 All right. Excellent. So I've got approval here. Looks like you entered a purchase order number for me. Fantastic. And you can actually require that if you'd like to. I'm not sure if I have it set as a required field currently, but now we've got approved work order. And before we go too far, actually, the visibility, you know, per quote is very nice, but the dashboard is going to give you full visibility over all of the quotes that have been sent out. So, as a, you know, vice president of service in managing all of these different account managers and wanting to understand, you know, how things are going, you'd be able to take a look at everything they'd be submitted and not viewed or approved, cancelled. What have you, the different statuses that they'll land in? So these will be all the quotes that have been sent out, but they haven't even been opened.

ROBERT

44:28 Okay.

DAN

44:29 And you're able to resend reminders or add a comment to all of these, hey, mr. Customer, we're out there working on your equipment last week and you asked us for a proposal on this, you haven't opened it yet? Any questions? But quickly send out, you know, reminders up to 250 at a time.

*--- Quoting ends ---*

DAN

44:48 For account managers. They'd be able to use this. Let's see. They just filter by sales person, right? Select themselves and they'd only be seeing their.

ROBERT

45:00 You guys put a lot of thought process into this quote piece. I like that.

DAN

45:07 Well, I think we've taken a lot of advice from our customers over the years and it sounds like you can tell that this is definitely created for what you all do.

*--- Quoting ---*

ROBERT

45:19 Correct.

DAN

45:24 Excellent. All right. Well, obviously with approved quotes similar to how you would generate those work orders for maintenance contracts, right? Upcoming work orders that are obviously preapproved. You could pull convert approved quotes to jobs as well. In this case, we're just going to create the job from the quote here.

*--- Assets ---*

DAN

45:45 Let's mark a due date. If we have it already, we'll bring all those attachments and comments and such over and go ahead and create the job. So this job ticket, it's already organized underneath the customer correctly? It's got our po number here, the description... what we're expecting here, the fixed costs that we have comments from that location level, the attachments from that previous efficiency report related to the repair and everything you need.

*--- Invoicing ---*

ROBERT

46:19 So I saw you, were it said, you know, add this to the service whip from a financial standpoint, are we generating revenue based on billing? Is it, is there an option for cost? Is there an option to do both service tickets, one way cash collection and the other by cost or what's the accounting method that, how you guys are set up?

DAN

46:43 So, I'm not 100 percent sure. The question you're asking, I don't know if you could dumb it down for me a little bit.

ROBERT

46:52 Well, I saw that it was, you have obviously there's a whip report. I'm assuming for the jobs that are open. I was just assuming are you doing cash accounting or, you know, job cost accounting on your service projects or is there an option to do either way or is it all cash?

*--- Invoicing ends ---*

ROBERT

47:09 I mean, I'd prefer in this environment for it all be cash accounting, but I think that's currently how we're doing that. Yeah. So I'm...

DAN

47:18 Not necessarily familiar with that terminology. Okay. I can definitely follow up with you on that, but I believe that it's either or, and budget is actually something that we recently added to the system around six, eight months ago.

*--- Dispatch ---*

DAN

47:35 So, if you've got a project right with service trade that requires multiple appointments, multiple, it's gonna take a few weeks, right? Or longer and you're going to have, you know, multiple people working on it, you can have multiple services. You know, week one, we're going to complete phase one and such.

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

DAN

47:51 So you can budget out that way for those types of projects typically with a repair like this. I don't think you'd be managing that budget or that?

ROBERT

47:59 No, correct. Absolutely. I was just curious as to what the extent was. But when, if I wanted to see, you know, all the quoted jobs, pop profitability standpoint and, you know, we estimated X amount hours what we spent, X amount of hours. I'm assuming that information is all available.

DAN

48:16 It is absolutely.

ROBERT

48:17 Okay. And...

DAN

48:19 Let's see. I thought I was already logged in to quick site, but it's saying I'm not give me one second here.

DAN

48:32 All right. So to give you an example of some of the, some of those reports.

DAN

48:43 Here, we've got maintenance service call repairs.

DAN

48:53 Pair opportunities recorded in quote status by month accepted fix. So this is a general report. But what you're asking for is available as well.

ROBERT

49:05 Okay.

DAN

49:08 It's actually isn't the one I was looking for to be honest.

DAN

49:15 Might have to come back to that. I think I'm logged into to somebody else's account somehow.

DAN

49:23 All right. So... let's see here. What else would be important for us to see today with the time that we have remaining?

ROBERT

49:34 Well, I think, you know, to christies point, she's interested in, you know, how do you guys typically deal with an integration? How is she going to get the information into her side?

--- *Accounting integrations* ---

ROBERT

49:43 So I know you can't probably get into depth on that. But if there's something you could, you know, maybe show or talk about, I think that would be helpful. Okay, sure. So.

DAN

49:59 As far as invoicing that's currently done in Sage, I'm guessing, right?

CHRISTY

50:08 They do this service invoicing actually out of the SM module.

--- *Tech On-site* ---

DAN

50:13 Okay. Gotcha. So that would that's actually good to hear. It wouldn't be much of a process change for you then because you could do the invoicing straight out of service trade. And so when Dan marks this job is complete, we'll go ahead and complete the job... all three services. It looks like we're completed. Now, you can Bill for all of this. If I need to, you know, track something or make adjustments. This is the spot to do it. I can also do this on the next page if I need to. But we'll go ahead and create our invoice.

--- *Invoicing* ---

DAN

50:57 And get it out to the customer. Now... the thing I really like about the invoice with or invoicing with service trade, which it sounds like that's probably the way that you all would end up doing it is that it includes the service report along with the invoice.

ROBERT

51:16 Yes, I am a fan of that, absolutely.

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

DAN

51:19 Excellent. Excellent. So... you can also send that service report, you know, individually. And similar to how Clint mentioned with the quotes, right? You can break this out as to not show all this detail. In this case. Looks like we're showing pretty much as much detail as possible as far as for, per service. And, you know, the

cost of each individual service... but they can pay now here with the credit card or a CH... and service details here. Summary. We've got some deficiencies found. Any attachments that might have been added? I didn't actually add any. But if you had forms signatures, photos, that type of thing, they'd be collected right here, comments from the technician... and services completed.

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

### DAN

52:19  And so that's how quick and easy it is to get the invoice out for completed work. And from this point, you would essentially with the Sage integration. So we partner with ie dynamics or it might be, I always wanna say E, a sports when I start saying that so, but I think it is ie dynamics. Let me see if I've got a quick... snippet I can share about that.

### ROBERT

52:45  So, I mean talk about the integration. You know, what's the cost of the timing. If you happen to know, I mean, how many texts that we have to have up and running at the beginning? What is their cost to get us up and running? You know, these are all things we're going to have to get approvals for. So the more information you can provide on that at this point, the easier it will be for us.

### DAN

53:07  Okay. So why don't, I do this? So we invested in this tool called recap, and it is basically, it enables us to collaborate with your team while you're evaluating the product. Okay? So what I'll put together is, and I'll share this with you all. And you all can also actually add individuals from your team to the workspace. Drop me comments here at the top or specifically on different sections. Hey, Dan had a question about this. Can we get more information on this? That type of thing... I'll put this together for and I'll go ahead and highlight a couple of sections here. One would be the Sage integration.

*--- Purchase decision ---*

### DAN

53:51  Definitely. We've definitely got a PDF flyer that kinda gives an overview with what you mentioned there, Christy, as far as POS and such. So that can kind of start the conversation. But I think what ideally would need to happen, it sounds like is for us to sit down with my, I call her the Sage whisper if you will.

*--- Accounting integrations ---*

### DAN

54:10  But she's she used to work for Sage. She's to sell Sage, and then she also worked for contractors as the CFO. So really smart lady. And she's got the good answers and the correct answers which makes it important?

### ROBERT

Do you know if there's if we'll still need the service module in Sage? Or that, will that be a cost savings that we could then roll into your tool?

*--- Accounting integrations ends ---*

DAN

54:34 That is a great question. I think it depends on a few factors. In some cases, I know that it's replaced the service module in other cases, it has not, but I know that Tania would know that. And so I'll be able to get an answer for you on that with her.

ROBERT

54:51 Okay.

DAN

54:57 So, we'll also have the next steps tab here as far as what needs to happen next, right? So it sounds like a couple of things would be reviewing a proposal including what it would cost with the Sage integration as well as time frame to get up and running.

*--- Implementation and ongoing support ---*

DAN

55:13 I'll tell you right now typically, you know, if you started with... I mean, it typically, it's gonna take you when we're talking integration and such. It's gonna typically take you about 90 to 120 days to be fully live the product.

*--- Dispatch ---*

CLINT

55:41 Sorry to interrupt here. I'm gonna have to jump on my next call at one o'clock but I just want to make sure that it was nice to meet you, Christy and Bob, and then I'll be working with Dan if you guys need anything whatsoever?

ROBERT

55:54 Sounds good. Thank you.

*--- Dispatch ends ---*

CHRISTY

55:55 Nice to.

CLINT

55:56 Meet you guys. Thanks. Bye, thanks, Dan.

DAN

55:59 All right. So, should we plan on what makes sense to you? All is the ideal next step?

ROBERT

56:11 Christy, I mean, it sounds like, you know, your conversation with their internal resources on how that goes together. I think is important. Is that sound?

CHRISTY

56:22 I'm gonna have to see how payroll is gonna come over, how POS are coming over, how we're getting all the revenue to come over into stage. I'm gonna have to see how all of that comes over and how we're supposed to set that up because all of that is what my team will be involved in.

DAN

56:40 Okay. Got it. So let me get with her and her calendar. Is there any times that typically work best for you is?

CHRISTY

56:55 No, I mean, I can be flexible.

DAN

56:59 Well, let me ask it this way. When is payroll due?

CHRISTY

57:03 I have someone who handles it. So I'm free.

DAN

57:07 Okay. Gotcha. Well, it looks like we may have some room next Wednesday afternoon at two 30 or three?

ROBERT

57:19 That your time or our time?

DAN

57:21 Be your time.

CHRISTY

57:23 Two 30 is good.

DAN

57:25 Okay. Excellent. Well, I will plan on that. I wanna touch base with her before you get an invite from me, but I think that should work good for us. So I will get an invite out to you. Would you like this?

CLINT

57:39  On that as well.

ROBERT

57:40  Bob, you can include me. I'll talk to Christie and see if she'd like me to be involved and then, you know, if you can send over some kind of rough information on pricing, you know, that would also probably be helpful. Okay. So.

DAN

57:55  I think makes the most sense. I can definitely give you a ballpark and we've got our pricing page which I'll attach a link to here and they'll be a tab actually that says investment here. So I'll share that information there to get you the most accurate idea of pricing. I think after we have our conversation with Kristi depending on what modules she needs with the integration and such, I'll be able to provide a more in depth view of what that would look like.

*--- Purchase decision ends ---*

ROBERT

58:24  Sounds good.

DAN

58:27  So, we'll plan on having that together by next Wednesday as well by the conclusion of that meeting and get something over for you to review. Anything else I'm missing right now?

ROBERT

58:40  I don't think so. From my standpoint, thank you for your time.

CHRISTY

58:44  That's it for me.

DAN

58:46  Okay. Excellent. Well, if something comes up, feel free to do, you give me a shout? You should be hearing from me later this afternoon and receive invites to the workspace here within several hours here latest tomorrow morning.

ROBERT

59:00  Awesome, Dan. Thank you for your time. Appreciate it. Alright. Bye bye.

# The End