



ServiceTrade Demo with Ledgerwood Associates Hawaii, Inc.

Dan Waggoner with Ledgerwood Associates Hawaii, Inc.
Recorded on 9/6/22 via Zoom, 29 min.

Participants

SERVICE TRADE

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Transcript

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DAN WAGGONER

0:00 Hi, good morning, Pat. How are you?

PATRICK

0:01 Good. How you doing, Dan?

DAN WAGGONER

0:03 I'm... doing well. Thanks. Have a good holiday weekend.

PATRICK

0:10 Yeah, we're got caught up on a few things. How about you?

DAN WAGGONER

0:15 Pretty much the same, pretty much the same. So, all the family for about six hours and then, yeah, get back to business. You know, it's nice to sometimes have that kind of administrative day on Monday to nobody does an injury or, you know, you get.

PATRICK

0:28 Yeah, I hear that you had a lot of catch up. I didn't get on my work done because I screwed up and went to the golf course couple of times, so.

DAN WAGGONER

0:36 Well, that's most needed therapy.

PATRICK

0:41 Where are you located at?

DAN WAGGONER

0:42 I'm in Durham, North Carolina. So probably a couple of 1,000 Miles away from you there.

PATRICK

0:50 Couple of.

DAN WAGGONER

0:52 Yes, sir. Yeah, I'm sure you guys got some beautiful golf courses out there, and why I've got a couple of university courses both by, but yeah, I'm sure you've got some pretty epic looking hold up there.

PATRICK

1:07 Yeah, yeah. It's beautiful.

DAN WAGGONER

1:09 Right. Well, I've got Dan or Risa joining our call as well. I think that he just popped in.

PATRICK

1:15 Like...

DAN WAGGONER

1:16 These connecting. So you got to Dan, I'm the inside territory manager, Dan is actually located out in California, so he's a little bit closer by... and I thought today as we're waiting on him to get connected but a little bit different of a type of meeting. They then we typically do right? From what I understand and you correct me if I'm wrong, but you're the stage consultant for elite mechanical, and they've asked you to kind of look into, hey, what are some service software solutions that would be, that would work alongside paid maybe compare?

PATRICK

1:54 Yep.

DAN WAGGONER

1:55 Okay.

PATRICK

1:56 No, no secrets here. I'll tell you everything. I'm not trying to hide anything. I'm a consultant with, I've been a consultant for 35 years, started out with the timberline product, moved into the Sage. Obviously when Sage bought timberline, I got about 150 clients add here.

--- Accounting integrations ---

PATRICK

2:11 Obviously Sage has a service product. Obviously, Sage has a older legacy product and the timberland product that we are trying to get moved to Sage intact. But sometimes people just don't see a need for that or want for that right now, my business out here because I'm a smaller your territory managers.

--- Accounting integrations ends ---

PATRICK

2:36 So you, I'm out in the middle of the pacific ocean, but one point 5,000,000 people, my territory is not that big. I had to, for lack of a better word, sell my soul to other business partners to try to Jenna up a margin that I could make a living on. So I work with that. I work with a company out of Portland, Oregon called skyline with a business partner for the northwest. My brother was a business partner. He just sold his business in Scottsdale, Phoenix area. I work with the net. Now a company out of Alaska called sock guy has purchased Scott.

DAN WAGGONER

3:19 Over there, right? Jeff Williamson?

PATRICK

3:21 Jeff Williams, skyline person. And he now is they suck. I bought them. So he works under the stock guy umbrella. So like me, Jeff Williams and works on the sock I umbrella. My territory is really always been why there's really not any territory's anymore.

--- Purchase decision ---

PATRICK

3:41 I mean, we know we can work from anywhere. But as time moves on... my clients really, I'm just trying to figure out how to help my clients best as possible. And part of that in the last talk with this particular client and probably with a lot of clients will be help them make a good decision, the best decision available.

--- Purchase decision ends ---

PATRICK

4:04 And if that's not Sage, then so be it because you know, we're in transition and maybe they don't want to go to impact and maybe we don't you know. So anyway, it's I ran across your product and I thought, well, I need to take a look at that product. Maybe it's something I need to present to the client. If it works, you know, the way as advertised, right? So it looks like you guys have been around for a while and looks like you check a lot of boxes.

DAN WAGGONER

4:33 Yeah, that's and thank you. I appreciate you being so open and transparent. I plan to be the same with you and let's see. It looks like Dan is trying to get in here again. So, but yeah, we work with Jeff over at there you are, Dan, can you hear?

DAN ORIZA

4:48 I can hear you now. Can you hear me? Can you hear me okay?

DAN WAGGONER

4:51 Sure. Sure. Even.

DAN ORIZA

4:56 Better. I'm having challenges with my Zoom. So new log in this scenarios, blah, blah, blah, Pat, nice to meet you.

PATRICK

5:03 Nice to meet you, Dan.

DAN WAGGONER

5:05 Awesome. Well, I was just getting a note, no Pat a little bit and about it, but what his needs were for elite mechanical, who's a mechanical contractor out and why he actually works alongside Jeff or he knows objective and kinda worked under the same umbrella as Jeff over at stock guy. So that's kind of where we're at right now, Dan?

DAN ORIZA

5:28 Awesome. Awesome. Yeah. Thanks for a paper calendar for us this morning, Pat. I guess it's pretty early there and the island, right? Wow. Okay. There you go. It's always, I used to support a, in a previous life. I used to go to the big island and malware quite a bit or I should say why, who, for business? I was there about once a week for every month for an unknown four or five years back with 18 T mobility so miss it there. And where are you located, Pat?

PATRICK

6:03 I am on a while.

DAN ORIZA

6:04 You are on a Y, okay?

PATRICK

6:06 Excellent. Yeah.

DAN ORIZA

6:08 It was just to stay there and write down waikiki, the shirts and want us or Friday. I could walk everywhere in the dukes and that whole area. So.

PATRICK

6:17 Yeah, I didn't go to Dixon, you're missing out.

DAN ORIZA

6:21 Yeah, right. Exactly. So... try to hit all the local places as well, but that was just such a quick John to walk walking up and that hotel there, it's hard not to do.

PATRICK

6:36 Yeah, yeah.

DAN WAGGONER

6:38 Well, we'll Pat. What do you need for me to confirm I'm in order to take it back to your team?

--- *Purchase decision* ---

DAN WAGGONER

6:46 I guess ideally, what I'd like to do is, you know, confirm, you know, any boxes like you said that you need to check today. And then typically, it's best to have, you know, the folks that are on the ground within operations to do for a full demo, that we walkthrough the product, make sure it's a good fit. So I probably have a couple of questions for you as well because we are, we do work for a specific type of contractor, right? But off the start, you know, what do you need from me as far as what would be good to learn from this meeting today on your side?

PATRICK

7:19 What I need that I need to figure out is if service trade is a potential fit and we know we're not probably going to check every box but if they're a potential fit for a lead and then present it to them as one of the options. So I'm kind of doing a needs analysis and just kind of figure it out.

--- *Pricing* ---

PATRICK

7:43 Okay, I'm going to present them with two or three options. Kinda gotta get a ballpark as to what it might cost and the work involved. They're looking at doubling their service department which is not big, you know, which means more maybe going from 12 techs to 24 techs.

--- *Pricing ends* ---

PATRICK

8:00 They do about 60 percent Construction, 40 percent service now. So that number could move a little... one of the challenges as I see it is a integrating back to the older legacy product, the saved 300 Sierra product and what integration means for service trade. Another challenge is if we can handle the Construction project management portion of it within the same product again, not deal, not a deal killer.

--- *Accounting integrations* ---

PATRICK

8:35 But we did look at a product called BuildOps which is out there. It seems to want to tell us that we can integrate. We can do both Construction and service, which is kinda attractive. We can do it all in one product, a lot of service products or just the service side of things.

--- Parts management (inventory) ---

PATRICK

8:55 And one thing that's big for them is material management material. I want to call it material management because it includes everything from submittals to purchase orders, to actually tracking and receiving the material and tracking it back from the submittal into the po, into receiving it and charging it out to the job.

--- Parts management (inventory) ends ---

PATRICK

9:18 So those are some key things. I mean, obviously, most service products are gonna handle work quarters. We're going to be able to do quotes. We're going to have a dispatch or we're gonna have a mobile piece to it. Those are pretty much a lot of the products are gonna look similar. Does that make sense?

--- Parts management (inventory) ---

DAN WAGGONER

9:42 Yeah, absolutely. Those are three, you know, good spot to start as far as, you know, looks like you need you're looking into something for parks and inventory, material management like the system to handle that. Obviously all the basic scheduling, dispatch, work order generation and that type of thing you've got constructed and service.

--- Type of work ---

DAN WAGGONER

10:03 So as far as 60 percent Construction now, but you're looking to double the service department. I think that's what I heard you say. So Deborah, you know, Construction service overall or are they looking to get more into, you know, service and preventative maintenance contract agreement? That kind of thing?

--- Type of work ends ---

PATRICK

10:21 Well, they have a, they have a contract that they believe they're going to get the next 30 days and they believe that's gonna double their business. It's a job. When they call it, it's a job contract with the federal government. So, okay. So things I would imagine.

DAN WAGGONER

10:40 Okay.

--- Type of work ---

DAN WAGGONER

10:41 And do you know by chance out of those 12 tech right now, you know, or any of them dedicated to the service side? I thank you for giving me the split and stuff, but I don't know if you, no, of course, technicians go, you know, do you have a handful of guys day in, day out doing service? And then the other guys are always doing a Construction, that kind of thing?

PATRICK

10:59 Hey, crossover.

DAN WAGGONER

11:01 Okay. Gotcha. And so for your Construction or those projects, are they typically, you know, three, two, six months a year, long, five years they have.

PATRICK

11:13 I think three, two, six months project. They're larger projects could be here. Okay? I've worked with them. They're like I probably worked with these guys over 30 years.

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

PATRICK

11:24 I help them set it up from your original system. I set up all their jobs. Their financial statements, probably train three different accounting groups that have went through that office. So that's why the owners kind of in this to me and say, hey, we don't have the knowledge to figure out what the best solution for us is. Can you help us? And I was like wow and outside my, what we do but let me see. Let's see what?

DAN ORIZA

11:46 Yeah. Well, you know, bunch of buried there in terms of all that history that you possess. So, so today, you so to today from it's origination, you supported their ERP and consulting but not necessarily evaluations filled service solutions. Is that fair to say?

PATRICK

12:07 Yeah, absolutely.

DAN ORIZA

12:09 I...

PATRICK

12:09 Mean, mark, mostly, I'm just trying to sell my product because that's where.

DAN ORIZA

12:13 Right. Sure. And so they've been, I was theory for quite a long time. What is, are they leveraging the, this, the service module, service management within that?

PATRICK

12:25 No, I have bastardize their system so that they could before service management existed, they had me.

--- Accounting ---

PATRICK

12:33 So service management didn't exist in the CRM world and I've bastardize they are with some custom reports and imports and inquiries to satisfy what they wanted at the time. And so now we're client, obviously, one of our options will probably be service state service... but it doesn't do some of those that doesn't do material management very well.

--- Accounting integrations ---

PATRICK

12:59 It doesn't do... really the Construction side. Very well. So if we find a product that can do that interfaces the same way, then I think that's something we want to present to them.

DAN ORIZA

13:14 Thank you for that context. So no service management module. So there, so is there a field service solution in place today or are you just said just kind have workarounds and something and, you know?

PATRICK

13:26 No canvas, they dabble and go can't don't do everything through there?

DAN ORIZA

13:33 Okay. Got it. So there there really is no, no, no still service solution per SE in terms of technician work order management and our front end for resource scheduling and dispatching.

PATRICK

13:45 Correct.

DAN ORIZA

13:46 Okay. So mainly manual processes, got it. So as SSO is that something has been evaluated in the past or just something you may be kicking the tires on?

PATRICK

13:58 It's never been fully evaluated in the past although they knew it existed. Okay. So I mean, you're saying SSO, I'm sorry. When you say SSO, I'm thinking our product is called SSO, and you may be, you may be thinking SSL on a more generic term?

DAN ORIZA

14:17 No, I know. Yeah, yeah, no, thank you for that replication. Now. I mean, the native app, okay? Solution within Sage associated service operations, right? That's what you're referring to?

PATRICK

14:25 Yeah.

DAN ORIZA

14:26 Okay. Yeah. Okay. Got it. And is there is 100 percent commercial I suspect are roughly? Okay. Great. I'm Dan, I'm sorry, I cut you off. You had a question there?

--- *Accounting integrations ends* ---

DAN WAGGONER

14:40 No, that's great. Thank you. Yeah. And that's really 100 percent commercial. I was looking on the website for elite mechanical a bit earlier as well and a lot of it does look like a good fit for us. We do offer a park management product. We definitely have many customers utilizing stage connectors and integration for 300 and... worked with, yes over there several times and Tanya any, I don't know if you ever bumped into her, but these are Sage, basically manager manages our partnership with based consultants and such. We're also partner with ecosystem. I believe if I'm getting that name, right? Yeah, ecosystem as well. So.

--- *Accounting integrations* ---

PATRICK

15:27 Used to be my brother's company at Ledgerwood.

DAN WAGGONER

15:31 Okay.

DAN ORIZA

15:31 Wow.

DAN WAGGONER

15:34 Okay. Yeah. So I'm sure you're familiar with them?

PATRICK

15:37 Yeah, yeah.

DAN ORIZA

15:38 Yeah. Just to assist with touch. Yeah, that is not connect. Your head is a native integration with what we have with 300 theory. So we're we have a lot of knowledge

base expertise around that integration. So.

--- Accounting integrations ends ---

PATRICK

15:51 Yeah.

DAN WAGGONER

15:52 Yeah. And if you do end up getting them to move to Sage intacct, at some point, that would be even smoother, right? Obviously for them, impact an upgrade, but the integration there is really solid as well. So we'd be happy for you and, you know, possibly be able to provide you sort of support in, hey, moving up to impact as well.

--- Purchase decision ---

DAN WAGGONER

16:15 It's going to be a really smooth connected with service trade as well to work out really well for you that type of thing. But yeah, I mean... as far as the decision makers for elite mechanical, obviously, they're gonna take, you know, your advice as far as I'm sitting down in a room though, to take a look at a product once you've made some recommendations, how do you see that unfold...

PATRICK

16:39 It's pretty easy if I deem a product is worthy of looking at, I'll kind of set the stage with them. And just a, that would be about four of them a key decision makers, and one person per Construction and a couple of people from service that will come in and we'll just do a Zoom meeting and present product and I'll kind of set it up and let you guys do your thing.

--- Purchase decision ends ---

PATRICK

17:01 And I'll kind of set the stage and do an evaluation afterwards and say, hey, this is a great, this is great because, you know, they have a parts management tool which could act as our recruitment procurement piece. It interfaces with say CRM.

DAN ORIZA

17:16 Awesome.

PATRICK

17:17 And if we decided to go with the impact in the future, it's still there. So we're not throwing good money after bad, you know? So the week part might be, maybe they don't do as much Construction manager. Maybe they don't have a document management feature. Maybe they don't have maybe the rfi change order piece for Construction that we were looking at. And if not, we'll have to figure out whether we go with the east or autodesk or God forbid broke or as another solution. I say real quick just because that just the sheer cost is.

DAN ORIZA

17:55 It's a beast.

PATRICK

17:56 Right. Yeah.

DAN WAGGONER

17:58 Yeah. So we can absolutely handle projects those, you know, three to three months to, you know, up to a year really and that's actually something that's sort of on our roadmap. That is something we're developing further. You know, you mentioned earlier, we did began specifically and service.

--- *Type of work* ---

DAN WAGGONER

18:15 However, our customers have been managing projects and three, two, six months, you know, since the beginning, right? We really consider those service projects, the installations, that type of thing our system set up to handle very well. So, yeah, I mean, really going down the list there, as far as the park management, we can help you with that, our partsledger application.

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

DAN WAGGONER

18:34 I don't know if you came across that on the website, but, okay, that's a very intuitive and inventory management system that will accomplish what you mentioned previously as far po and receiving orders, what I'd like to do is set up a time for us to, you know, basically provide you with the sort of the apply or if you will or a pitch to them as you need and set up a time for us to gather together.

--- *Dispatch* ---

DAN WAGGONER

19:03 So I can really get with my team, put together a presentation for y'all going through that, you know, the aspect of service trade that you need rather than just that quick, you know, 30 minute fly over that you might be a custom to when you introduce yourself to the platform. Does that sound like a decent plan or?

--- *Purchase decision* ---

DAN ORIZA

19:23 Yes. I mean one of...

PATRICK

19:24 The, and I don't know if this is exactly what you mean. But one of the things with, in my process here?

DAN ORIZA

19:30 I don't want.

PATRICK

19:31 To get no way when you guys do your demo of how you do things. So I liked that and I don't want to ask a bunch of technical questions that may or may not be relevant to the audience. So upfront I would probably because I'm not familiar with service trade that much upfront would be kinda cool if I could get like a half an hour, 45 minutes, just so I could see the product myself and talk about the integration in which, what are the integration points and some of these key things that we talked about. So when I can set the stage for the client as to what we're trying to resolve with this with service trade?

DAN WAGGONER

20:11 Okay. Absolutely. So couple of things come to mind there. I mean I can give you applied over the product, you know, today if you'd like to, but I feel like might be a better option.

--- Dispatch ---

DAN WAGGONER

20:24 And you let me know is for me to chat with Tonya and I was talking to her earlier this morning. Unfortunately, he wasn't able to join today at this time but possibly set up a quick meeting with, you know, yourself per and I and we can handle a lot of those specific Sage questions that you might have and walkthrough reports in a service page together or, you know, a third option would be to get you on the phone with her today. I'm sure that you've got some time, you know, for a quick call with you today where you could sort of run through, you know, what our customers are currently doing and kind of bounce a few things off of each other.

PATRICK

21:00 Great. We can do it today. It's fine.

--- Dispatch ends ---

PATRICK

21:02 It doesn't matter. You want us to get different later in the week. I'm just at my desk working. I don't have any scheduled appointments. I'm trying to catch up on the work that's why I didn't do it on the weekend.

DAN WAGGONER

21:13 Okay. So if I get with her and have her give you a call later this afternoon to touch base, you know, failing that we can plan on either getting on to do, you know, which would you prefer?

--- Purchase decision ---

DAN WAGGONER

21:26 I guess is the question, did you think it would work to chat with her just on the phone? Or would you prefer me to find a time where we can sit down on Zoom and, you know, go through the product?

PATRICK

21:36 Okay. First, I wanna kinda see it a little bit.

--- Accounting ---

PATRICK

21:40 I don't need to see the detailed, but it's I think it's good to have the screen up in front so we can talk about it and talk about what the interface means to you. What's pushing, let's pull in, what's a direct integration with the import export? What are you guys mean by that? I wanna, I want to be clear with that when I present it to the client.

--- Accounting ends ---

DAN ORIZA

21:59 I think that's a great idea Pat, and it'll be good. Yeah, I think to have Tanya Dan on that call and we can on a separate call right where you can do a... you know, all about service trade regular. There's a different applications, meaning that front end for your back office resource scheduling, dispatching, the check application, go through all the product functionality. I'm not sure if a customer portals important to your customer to leave?

PATRICK

22:25 I mean, it's kind of a nice to have and that.

DAN ORIZA

22:28 I say, I'm not a guy that, yeah, go through the product, make sure checks all the boxes, you know, you'll get some familiar, yeah, already with the user interface. And most importantly, like you pointed out the integration points, right?

--- Accounting integrations ---

DAN ORIZA

22:40 Where all the hooks, you know, what's you know, reading, right? Some, what's you know, what sinking? Yeah, I think so on.

PATRICK

22:47 I think those are the big point. I mean, other than the obvious things that any service contractor once I think the big points or like what I mentioned the integration, how that's gonna work... if there's a Construction element, materials management, those three things.

--- *Accounting integrations ends* ---

PATRICK

23:04 I think we're kind of critical. I mean, if we do have a client portal, if we have a salons, time, keep tracking and interface into payroll. Great. You know, those kinds of things are even that they're going to get the scale better. And, you know, obviously if you have references that are around, you know, that they use, is your product in the CRM product... that'll be really sweet. I'll obviously, you guys are, we got that.

DAN ORIZA

23:40 We can support that absolutely in terms of you mentioned document management. Was there, are you talking about just a repository around potentially, you know, forums, inspection, forms, startup, orange, checklist, photos, videos, attachments, that type of thing or are you talking more on the project side in terms of contracts and, or all the best schematic? So.

PATRICK

24:02 Well, I mean, I'll send that.

DAN ORIZA

24:04 Okay. Yeah, we're yeah, can have the homework or the product. So, absolutely.

PATRICK

24:09 Yeah, yeah. Okay. All those things apply so that's on the service side. So it's on the Construction side and some of the process, sure.

DAN ORIZA

24:17 Got it. Got.

DAN WAGGONER

24:17 It... yeah, and Pat, you know, one of the things you mentioned obviously all the thing that everybody all contractors want.

--- *Customer engagement* ---

DAN WAGGONER

24:27 Well, you know, I've met with hundreds of different service contractors in funny thing actually that a lot of a lot of different stuff. A lot of them really feel that the wall, the thing is very important and something that's different about us is that we're really focused on putting your brand in front of the customer and we're focused on your customers and experience. So having it, making it easy for your customer to

access the information that you're providing them in that you need to get them making it easy for them to say yes to your recommendations picture one click approval. It's really the Amazon experience, right? So providing them a easy way to do business with and have access to your team services. So that's really where a lot of our focus really all of our focus goes in the platform is making it easy for your end customer. Obviously, you gotta put together operations billable operation first in order to reach that point. But that is one of the one of the ways we're different. We value the customer experience for your cost.

--- Customer engagement ends ---

PATRICK

25:32 Okay. Cool.

DAN WAGGONER

25:35 Why don't I do this? I'll get with Tonya today and you can expect an email from me later this afternoon, shoot out a few times to you about setting up something later this week with Tonya and we can go from there. Okay. Alright. Anything else? Any other questions I can help with today or... no?

--- Purchase decision ---

DAN ORIZA

25:57 Not unless you've got...

PATRICK

25:58 Something you want to have that unique about you guys you wanna tell me. But other than that, I'm sure it'll all of you know, like in a brief conversation and then also meeting with the client. Obviously they want to move quickly, but I mean, obviously, we can't move that quickly. I mean, it's you're trying to evaluate as product that's you know, takes a bit of time.

DAN ORIZA

26:18 Ideally, what is the time in, like you said, you know, sooner than later? But I mean, ideally, we do have a, you know, thought in your back on my mind as far as your customers that have expressed around topic go live?

PATRICK

26:31 Yeah. I mean, you look at a month out, but I don't think it's realistic.

--- Purchase decision ends ---

PATRICK

26:36 So they might have to use their existing stuff before if the, if all these contracts come into play but, and they don't have a great solution already in there. So we're gonna, it's not exactly an easy way to pull all the assets and everything together. So, we got that. I got a lot of setup to do there.

DAN ORIZA

26:54 So, not displacing a solution so that, that's the positive, right? But it's all around like you said that data collection and import them admin potentially under service trade now.

PATRICK

27:05 They don't have a lot of history in one place. They don't have all the clients of equipment information gathered ready to go. That's kinda filled as we go kinds of things.

--- Purchase decision ---

DAN ORIZA

27:18 You're going to be busy? No... we're going to be busy. Yeah. So it sounds like they'd like to make a decision by, you know, by the end of the month and, you know, get something rolling in October timeframe?

PATRICK

27:32 Yeah.

DAN ORIZA

27:32 Is there a best case scenario? Okay. Alright, Dan, do you have a thought around getting meeting with time? You're going at the end of the week or so?

--- Purchase decision ends ---

DAN WAGGONER

27:42 Yeah, I think we can definitely make it happen this week. It sounds like Pat your decently flexible and I will make it a priority to get something set up for, you know, this week.

PATRICK

27:54 Yeah, I did a presentation for them Friday. I would imagine if we got something set up earlier and then I, can I buy set something up for Friday? They could probably, yeah, that their team together at eight AM our time on Friday and we could do a presentation to them this week if we could get together sooner versus later, you know? So anyway, just like, you know?

DAN WAGGONER

28:17 Okay. Excellent. Well, my calendar is pretty clear on Friday. So, yeah, that sounds like a great plan. I'll try to get something together for us with Tonya, for, you know, maybe later this afternoon or tomorrow... and be in touch with the very short.

PATRICK

28:33 Yep. Right on. I appreciate it in and.

DAN ORIZA

28:36 Yeah, right. Yeah. Thanks for your time Pat.

DAN WAGGONER

28:40 Okay.

DAN ORIZA

28:40 Take care.

PATRICK

28:41 40 hearing from you. Bye bye.

The End