



ServiceTrade/Hugh O'Kane Electric

Kurt Dillmeier with Hugh O'Kane Electric Co Inc
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Participants

SERVICE TRADE

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OTHER

Stan

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Transcript

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KURT

0:00 Hey, Stan. Good morning.

STAN

0:01 Morning. How you doing?

KURT

0:02 Good.

STAN

0:04 Are...

CHRIS

0:04 You still?

STAN

0:06 There I don't... I don't Chris, Kurt?

CHRIS

0:08 Good, good. See again... time is coming onto.

TANYA

0:16 Good morning.

STAN

0:17 Hi, good morning, Tanya. How you doing?

TANYA

0:19 Good. How are you?

STAN

0:20 Yeah.

KURT

0:21 Stan. Thanks for your time. We might have one more individual jumping on it'd. B, Danny, Gary, he's part of the team Chris and I work in. So just so we're all on the same page... as far as today goes, Tanya. Thanks for your time as well. So, we met with Stan and his group... last week... last week. Yeah, last Monday or Tuesday and feels like a, you know, on the go. But there primary... you know, what they're trying to address currently is the... the time card issue with Texas coming into long island city to get their work orders for the day and then going out from there. They've looked at SSO, I think they've spent a decent amount of time with them. So I think that's... that's where they stand and, you know, I Stan, I want you to kind of drive this conversation. Anything... any... any questions you have for Tanya? And as... as you know, Tanya is, I'm a former CFO and mechanical company and no Sage and all the 103 100 and tag all the Sage products underneath it. So without further, do I'll... I'll let you kick it off, Stan?

STAN

1:38 Sorry. I mean, do... do we wanna wait for that then, I, Daniel, or we can go, we can proceed?

KURT

1:44 Yeah, we can go. Danny's he may or may not jump on.

STAN

1:47 Okay. Sure. Yeah. So as Kurt mentioned we, we've been looking at different software solutions. I've been with the company for just about two years and we're... we're... we're behind technology wise.

--- Accounting integrations ---

STAN

2:00 Everything is manual time sheets or build out by hand, email to payroll and we entered into to Sage. And then we do an import into adp. So I've... I've been trying to look at different solutions and we have looked at a few I'll be looked at as a near real estate pro core or Oracle acted to the presentation but they actually made it that... that, you know, we're clearly not a good fit for them. I mean we would have to reward to Oracle platform... and... and we've looked at Sage field apps and that the challenges I think there's... there's a lot of folks here web been doing things the same way for many years and they're comfortable with that and it works for them.

--- Paper process ---

STAN

2:46 But there's just said it's a manual process and I think needs to be a little bit caught up with technology with that. Said though we don't need to be, we don't need cutting edge technology. I think it would be wasted in the valley on us. How we probably wouldn't realize the full benefits of that.

--- Purchase decision ---

STAN

3:03 And... and... and the bigger concern is they may actually overwhelm everyone. So that's the fine line that we have right now is we wanna... you know, move forward technology wise just to kind of... help improve our processes and be more efficient. But the same time we don't wanna overwhelm everyone... and... and, you know, for, you know, that does it so far?

--- *Purchase decision ends* ---

STAN

3:29 The one that we know and you get what you pay for it. But it seemed like the... the... the... the most reasonable where cheapest solution is the Sage field ops because, you know, there's no real integration. It's... it's a add on module... and it's a small step, whatever it is a step forward. It would be a support for us but the cost significantly less than like... like senior year.

TANYA

3:56 And the thing is we... we...

STAN

3:58 With the Sage peel it off right now, there's... there's a time entry component which will help with the payroll entry, but there's also a dispatch feature which will help with assigning work.

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

STAN

4:09 And also we want to track our... our labor costs on the more detailed level. Right now. It's everything's just going into labor. We want to say, okay, are they doing splicing? Are they doing the, whatever the... the... the detail we want... we want? A little bit more detail which should help us with our estimating look, you know, looking back and comparing apples to estimates and so forth.

--- *Accounting integrations* ---

STAN

4:33 So that's where we're at right now. Is we're... we're... we're... we're looking at different solutions that we're trying to find that right balance between something that will help us and maybe and not overwhelmed us.

TANYA

4:44 Okay. Well, as Kurt said, I was just CFO but I also, so Sage and Sage service operations and Sage fields up for a long time, so very familiar with the products. And so understand some of that just have phi. So are you using service management the?

--- *Type of work* ---

STAN

5:06 No, no, we're not, no. They're actually they are building, they would build a thing for us so that we wouldn't necessarily wouldn't use service management. Man. I don't know Kurt and Chris. I don't know if they... if they shared with you a little bit about our background as far as like our service work isn't that like the typical service work? I, as I said, it's not like sending out people, you know, to repair, you know, residential work.

--- Pricing ---

KURT

5:35 I think it's more.

STAN

5:35 Than more and more project, but it's just is not smaller job as opposed to one that may go more several months. These... these or maybe within a month is also based on dollar sizes. You know, we... we say great, basically anything under 100,000.

--- Pricing ends ---

STAN

5:52 It's something that we typically will complete in a much shorter period. So we... we treat those as service jobs, but it's not like a daily service aside.

TANYA

6:02 Okay. Okay. But still wanting to dispatch and track all of that as well?

STAN

6:07 Yes. Yes. And... and again, I... I... this is one of the challenges.

--- Accounting integrations ---

STAN

6:14 We know Sage, there, there are a lot of limitations with Sage... and I think that's one of the... that's one of the things if we proceed with Sage, but again, that's not a major investment but in a way we're getting a little bit more and more stop. SH.

--- Accounting integrations ends ---

STAN

6:32 But on the other side is if we're going to make a change outside of Sage, that's a huge change and that's something that we're looking to do at least in the short term.

TANYA

6:45 Okay.

STAN

6:46 I'm thinking in the next five years unless reports to.

TANYA

6:51 Right. So, are you, so you're... you're what you're wanting to guys to get on board with doing things more electronically like clocking their time on the phone and maybe even getting their job assignment on their phone?

STAN

7:04 Yes. And... and some of it's just similar to we do some of the manual right now. It's... it's... it's mainly written. And then this, we enter it again. It's just, you know, there's more risk of human error, sure. And it's just to save time, you know. And again, right now, our... our thinking is the warm and would actually just entered a time for the whole crew as opposed to each individual person.

--- Access to information ---

STAN

7:28 But, you know, we, that, you know, that we'll have that flexibility if you wanted to do that later on to have each individual person just punch in and punch out and they would do that on their mobile device. And then we would do an upload... into... into Sage.

--- Tech time tracking ---

TANYA

7:45 So, you... you said you use adp, but are you running like a mock payroll through Sage or are you getting the results from adp and bringing them in?

STAN

7:52 It's gone the other way. So we, so everyone that has a time cards to a job, it's entered in Sage. And then we do, we have an upload file that we generate out of Sage that we then upload into adp. And then anyone else who has non chargeable time, they're only set up an?

TANYA

8:14 Okay. So are you then like running actually running payroll and say just to push the costs out? Or are you just using it to funnel in and funnel out?

--- Accounting ---

STAN

8:23 No, we're... we're pushing the cost. We're entering so that it's entered in the job process. So we enter it in payroll and then we push it and then it will post a job costs. But then we create an upload file that we then use to okay upload file for?

--- Tech time tracking ---

TANYA

8:39 Okay. Okay. So, are you are using the payroll function out? Okay... okay?

STAN

8:44 Yes. And again, that's only for people that have time charged to a job admin and stuff like that. They're only set up an agency. We don't have a ton of time. And most of those people, they're... they're... they're you know... it's... it's tough as hourly, but it's... it's really, you know, they're not... they're not working overtime. So it's the same thing.

TANYA

9:03 Gotcha. So job time is put in process to the job, but then like your time overhead time is just when you make the entry from adp, that's when it hits the books from the, for everybody else.

--- Accounting ---

STAN

9:15 Okay.

TANYA

9:16 Okay. Gotcha. Okay. Well, you know... with... with... with service trade, you know, they... they will be able to track their time and record their time and we do have an integration point that we can push that time back into Sage. So it just comes in as an import file.

--- Accounting ends ---

TANYA

9:34 So it's you know, people can put their time and it's a very, if Kurt and Chris showed you, it's a very easy, you know, I think it's a more user friendly for the tax putting their time in through service trade. It's been kinda buttons they're pushing and it's a very simple to collect that information.

--- Tech time tracking ---

TANYA

9:51 And then we'll captured all, create a file and it can either it's a manual, just import in through the time management module so you can pull the time in and then process it through stage, which is, and then you can also grab that same time and your same workflow could take place, grab that time, push it to adp.

--- Accounting integrations ---

TANYA

10:10 Now with SSO, I would just sort of thinking through, you know, with... with the jobs and just capturing time that will work, but you guys are going to get into scheduling then that would mean you'd have to move into using the service management module.

STAN

10:24 Hi, this is required. I wasn't I, that that's required to use to dispatch?

TANYA

10:28 But, yeah, for SSO, yes, per Sage. Yeah. So if you were just gonna collect time like you're like looking for just want to do the time collection then, you know, it can report to jobs and you can go to jobs that would be fine. But if you wanted to move into scheduling and dispatching, really the way that it does that is through... the... the work orders and creating that you can do some very light basic scheduling. But if you're wanting to, but give somebody a assignment like, hey here's, Stan here's where you're going today and you get like a dispatch that would really be from the service component, which would mean implementing the service management module. So I think if you were to go that, so, so route you'd be doing to things implementing service management as well as implementing the field component, where with... with service trade, we can, you know, do all that work within service trade. And then we're just passing over the information into Sage, you know, here we schedule the job.

--- Invoicing ---

TANYA

11:28 The guys are clocked into the job that time flows to Sage. And then any invoices that are generated added service trade would be also passed over to Sage as well. If you wanted to do the billing out of service trade because you wanted the, you know, the features, some of the features that come with that. So I'll go ahead.

--- Invoicing ends ---

STAN

11:51 Sorry. Go ahead. No, I'm sorry, you can finish it.

TANYA

11:53 Okay. I was gonna share my screen. Oops.

STAN

11:57 That's fine.

TANYA

11:58 Chris or whoever I'm not sure credit the meeting, but it's not letting me share my screen.

--- Accounting ---

CHRIS

12:10 You can make Tanya the host to.

TANYA

12:16 There it goes. Thanks. So you can see my screen here.

STAN

12:22 Yes. Okay.

TANYA

12:24 So, you know, within Sage, you've got customers and then each job to job, we kind of can mimic that... that. We've got companies which are essentially your customers and location.

--- Invoicing ---

TANYA

12:33 So that was probably stay pretty constant the customers, but obviously, you get new jobs. So those get setup as locations then we.

STAN

12:42 And...

TANYA

12:42 Push over if you aren't gonna, you wanted to do billing down of service trade, you could push that over. If not, you may stay with doing your billing out of Sage, you could continue with that. Are you doing like 10 and billing out of stage right now using the billing?

--- Invoicing ends ---

STAN

13:00 I need to get other folks involved. This is all about billing. We have so many different scenarios, some cases where we go onto some third party site to enter in all of the.

TANYA

13:13 Yes.

STAN

13:14 And then if certainly I think some of the, I... I think some of the... the invoices we actually kind of manually, I mean, it's posted in... in total, but then we may need

to put in a little bit more detail or prescriptions... some of the cases.

--- Quote templates ---

STAN

13:29 I don't... I don't know if we can just generate a straight out of the system. But again... we, I would need to get other people.

--- Quote templates ends ---

STAN

13:38 Maybe that's something that, you know, it's yeah, we... we can learn a little bit more about it later on. It's not something that we're looking to do at the, at this time.

TANYA

13:49 Yeah. Okay. And that's fine. So then really what we would be doing is pulling out of Sage are actually out of service trade, the labor.

--- Invoicing ---

TANYA

13:57 So the time so as guys are clocking in and we would pass that over into time entry. So that then you don't have to Ricky that what's been put in straight from the field is what comes over. And then there's different places where it can be reviewed inside of service trade or once you bring into the stage, you may review it for a final time before then gets processed through.

--- Accounting ---

STAN

14:23 I'm so I can go back to that screen.

TANYA

14:24 Sure. Yeah, no, that's okay.

STAN

14:26 I was still our, yeah.

STAN

14:34 When, when... when service trade, when we're doing all of these... you know, when you're thinking it and... and... and uploading data and so forth. How does it get into the job costs system? I see like the location that so... you know, so for instance, we had 10 new process like ap related stuff or is it all just on the billing side? So for it.

TANYA

14:57 More on the billing side, I mean if you are wanting to put costs and a service trade, you could put cost and we can sync it over is more of a journal entry that you're kind of recording that some people who are, you know, they're continuing to enter their ap into Sage, but they really enter it into more like what we can do is we can bring over and I've got a screen of it jumped down here.

--- *Parts management (inventory)* ---

TANYA

15:20 So if we are putting costs and so here's some purchase some materials that were bought really what we bring over as a journal entry where we... we debit cost of good sold and then credit like an, a cruel account. And then, and Sage, you would enter your ap against just that a cruel account, clear it out. Basically if you wanted to see all that costs inside of service trade as well.

--- *Accounting integrations* ---

STAN

15:43 And I, in a way also to do more like... and... and again, not to overwhelm that's overall. Like ideally, I would love to like automate and... and sync up all the different modules within Sage or even whatever system if we ever had to change. So if someone out in the field, you know, yes, they have all the information about the job and everything.

--- *Parts management (purchase orders)* ---

STAN

16:09 But now let's say they need to put in a purchase requisition, can initiate that requisition through service trade. And then they had to go through to work with proper workflow to get approvals and so forth. But then they can see the status of y'all ever hit the... the... the purchase order was approved and submitted.

--- *Parts management (purchase orders) ends* ---

STAN

16:27 And then now we get... you know... you know, what we pay to date, what we've been voice today, well, you know, and so I'm just getting all of that information in one location if... if that was possible. That because that to me would be ideal.

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

STAN

16:42 Again, I'm probably jumping way far ahead because we were nowhere here, but just wondering... wondering if that, if those are possibility.

TANYA

STAN

16:50 Like down the road that we will be able to build something like that, where basically have everything in one... in one place where you can see, okay, you know, everything, how much we've hey, how... how our actual cost compared to our estimated costs and so forth materials labor a sub contractor, so forth.

--- *Parts management (inventory)* ---

TANYA

17:10 You could take some of that. I mean, there is a module that we have it's called partsledger that lets us do more sophisticated purchasing and, you know, creating a po is and even some inventory tracking if you ever had a need for that.

STAN

17:22 We do.

TANYA

17:23 Have some newer functionality coming out that's gonna let us get into tracking, you know, like budget versus actual.

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

TANYA

17:29 So I think that this system definitely is going to grow with you with your needs as you guys get into this. And but, you know, still allowing you to like baby step into it. You know, the nice thing is it's one system that we're you know, staying with a net if you ever decided at some point like, hey, we're ready to leave Sage. We're really ready to go into the 20 first century. You know, then the nice thing with this is that I can, we work with so many different systems we cannot couple from Sage and connect to something else. And all that history is kept in service trade on the service side.

STAN

18:02 So, I don't recall... like... like the pricing like... I... I own a movie for you guys. I know you guys, okay. I just don't remember how it was. I like that because that... that was one of the concerns. Just like zero for example, is one that we also look at me like it was significantly like more expensive. And then there was a lot more integration related costs. And I mean that... that, that's unfortunate. I mean, that's... that's... that's a big part of our decision, your processes, you know, right now with, you know, if we go to Sage BuildOps rock route, you know, it's... it's not that expensive. We could try it out. We don't like it. We can walk away, you know, isn't it? Well, it's not that painful. Some of these if we start building integrated where we're stuck with it or we're going to have to figure out a way to make a work even if it doesn't work. And... and that's... that's some of the harder I mean, that... that at least that's what I see as... as, you know, something that, that's... important for us to... to... to figure out. Okay, what's the, how much do we need to invest and what's the risk?

CHRIS

19:17 Yeah. So I don't know if I can pull up the pricing page.

--- Accounting integrations ---

TANYA

19:23 I'm sorry.

CHRIS

19:24 Yeah. There's a couple of different ways that the integration piece can work, right? We have more of a import export type integration piece and then more of a fluid integration with the pixel integration piece. And Tanya, you probably know better than I do as to which one would fit better based off of what you say. But then our pricing structure is based off of technicians. Let me share my screen.

--- Pricing ---

STAN

19:53 Every call. I think it was something like based on the, okay, the users. So.

CHRIS

19:58 Yeah. So... you know, I'll... I'll office staff, sales staff, admin staff, they are... they are all free. We were kind of chit chatting with you last time. If I recall correctly... you guys would buy licenses as groups, meaning you would have two or three guys under one license because, you know, call it a fan would be a license if you will versus the technician based off of some of your project work. So in order to have that integration, you have to be at 119 per month per technician. And so, you know, hey, that's... that's obviously everything's negotiable especially with the company, your guys size. So don't... don't hold my feet to the fire there in terms of the... the technician license.

--- Pricing ends ---

CHRIS

20:47 One of the big differences that you will have though between us and SSO is we're not gonna charge you for any of the office staff.

STAN

20:57 And... is the search like... service and... and integration or implementation? All of that? Is that, what is we have? Like why do? So? I'm sorry. So I see on the bottom there support for custom integration so that's all included. Is that, am I reading that correctly?

CHRIS

21:19 There's gonna be some setup costs for the ration part once it's set up today. Do you have that off the top hand? I don't have.

TANYA

21:29 I think if we're just looking to bring in time, I mean if you're any depends on if you anticipate doing the... invoice.

KURT

21:39 Interesting.

TANYA

21:39 Your time and maybe invoicing you probably looking at around, we're going to be the import in maybe it'll be around 3,000 and then, you know, implementation, you know, I can look at what that would be on that as well.

STAN

21:56 Okay. But... but the other as well. So, so the... the 119 per month that includes the, at the end of the month for seven Burgess, there isn't like a separate service agreement that we need to sign.

CHRIS

22:10 No, all of your support and everything else like that would be and Kurt and I can work up a much more formal quote so you can kind of see this as a line item thing... but... but all of this is, will be included, right?

--- Implementation and ongoing support ---

CHRIS

22:22 Your... your support, you guys would have essentially let's say you go with service trade. The long story here is will kick you off to director of support that we're going to give you a PM, probably two PM project managers for your guys onboarding service trade. Once you get through the on-boarding they kick you over to an account manager. And that person's in charge of staying up to date with what you guys are doing monthly touch INS to make sure everything's well, I'm kinda talk with you guys and make sure you're up to date with all the new features and everything else that... that we are launching. So you guys are aware of that. If it makes sense for your business as well as you guys will have a report with somebody that specifically your support guy, right? So it'll probably be Patrick in the beginning. Then once you kick, once Patrick get you live and up and running, he migrate you over to the actual customer support base. And whoever that person is, I don't know who would get assigned to your account. So then you would build some report with that specific person that is a service trade employees that would kinda know your guys account better than anybody else.

STAN

23:26 I would call, I think that in our meeting last time, yeah, you had another customer that and I think it was...

KURT

23:33 Or...

STAN

23:33 Or the... the bigger jobs that we had, I think you mentioned that they use pro core or a bigger project. And then, so what, what's the reason why... why can't you?

CHRIS

23:46 Yeah. So I... so I call the swim lanes if you will. And... and what I mean by that is we know what we do well and we stay in our Lane and pro core, we know what they do well and they're kind of staying on their side. We're partners with pro core part, pro course, also partners with Sage. Pro core just does a much better job on the heavy construction type projects that we do stuff that's you know, 100,000 dollars and more eight weeks long, you know, 16 weeks long, you know, I got... I got 10 guys out on a job site for six months pro court as a much better job of handling some of that stuff. And weekend... we're more of the... the turn and burn me and I got... I got four guys out here for four day project. I got two guys out here for... for two days, whatever that is.

STAN

24:38 Yeah. Well, we did have a demo or not. They don't they didn't have like a dispatch feature net. They worked with like another third party to who to dispatch. And... I think it was just the way it was set up like they seem like all the information just closed one directionally. So like you would assign all the work I think with that third part. But then that doesn't flow back into like into job costs or it. And at the time entry so that, you know, so let's say we assign myself, but I was supposed to do these, you know... you know, we have the job numbers and that the... the cost codes... that... that... that would that work that job. But then the personal is entering the time still needs to go back and re, select all of that. And we were hoping that, you know, if we're... we're assigning out the work and have all of that signed, it should automatically go into the time entry, but it couldn't handle that.

--- Accounting integrations ---

STAN

25:33 So that was one of the reasons, you know, one of the things that we know we were concerned about with... with pro core is I didn't have to dispatch and... and the... the part, the other company that they work with... it... it... it just... I think you could just import information from Sage, but you can spit it back out the other way... alright?

CHRIS

26:01 I, Tanya, maybe I will speak, I don't know how that pro core integration works with... let's see.

TANYA

26:10 He doesn't do a lot with time, pro core that was they don't do a ton with time. Maybe they can collect basic time but they're not really, they're not really collecting like, is it over time?

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

TANYA

26:22 They're not applying a lot of those roles to it. So that... that would have to be sorted through before it can kind of come in. But it does have other integration points with, you know, as much job costing but really like.

STAN

26:40 It was a lot of like project management, yeah, exactly... exactly.

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

TANYA

26:44 Exactly what it is. Yeah. Yeah.

STAN

26:46 Hi, sorry, useful from a project management perspective... but I, as far as from like... I guess that... that affects me the.

TANYA

27:00 Yeah. And that's what I was thinking. I was like, well, you're not worried about that? Yeah, I've just looked at yet they still don't touch their integration, does not doing anything with time right now.

--- *Invoicing* ---

TANYA

27:11 But if you were to generate budgets and pro core, you know, that would push over. They do now do things. If you were to put invoices into pro core, those invoices would push over as a P invoices. But, you know, if your first thing you're trying to check off your list as time that it's... it's not gonna do that, it's... it's definitely built for those big long projects to manage all the project, you know, RF eyes the collaboration, those types of things that you have.

--- *Invoicing ends* ---

TANYA

27:38 Would you got those needs that it is a great tool. So.

STAN

27:40 I guess the thing I was kind of getting indirectly is Daniel, would you be able to do track that time through service type for those big jobs?

--- *Type of work* ---

STAN

27:51 Like why? I guess that was a pilot and also like why couldn't to handle more... more the project management side of it. But from the time entry side of it, you... you... you can use, we could, we would be able to use service trade to track the time for like the bigger project jobs?

TANYA

28:07 Right. And if you, in some people actually we have an integration with pro for, so, you know, you, the, a lot of companies use service trade for these smaller jobs, you know, smaller job meeting. Maybe it's just a couple of days, couple of weeks. And then the large projects that are years long, you know, those get done in pro core and then we can patents.

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

TANYA

28:25 So if you have a guide, it's usually working on the smaller jobs works in a large job, we can pass the time over from service trade to pro core. So that pro core can see everything.

STAN

28:36 But you can still, we can still track the time and process the time entry for the larger jobs is just that it may not feed into like maybe if a pilot, but I guess that's supplies. I don't wanna have to worry about time entry for service just for this one for service or, but then I still need to look at something else to handle that bigger jobs I want to be.

TANYA

29:00 Hello?

STAN

29:02 One solution to... to track all time entry point choice of the jobs, whether they're bigger small.

--- *Tech time tracking* ---

CHRIS

29:10 Having you, can you service trade? If... if all you need is a... you know... you know, a six month job in a clock in and clock out that's fine for service trade, you can do that.

STAN

29:21 But why... why can't I use that for like a job bigger job that's over a year if I'm using it just for time entry.

--- *Recurring maintenance* ---

CHRIS

29:28 You, can, you're just, it's... it's I can show you specifically. I think I can pull it up. It's I'll show you where it's gonna get long and it's not that you can't do it, but what that will do is if you are going to bring in a lot of data on a specific location page that if you're going to start running service calls on?

--- *Type of work* ---

CHRIS

29:55 It gets a little bit clunky.

CHRIS

30:02 And what I mean by that is... is have you have a location that you got a crew of 10 guys out there for 18 months as well as running service calls and everything else... under here on the jobs, you're gonna get a long list of jobs because you're going to have something that's 18 months long versus smaller one day jobs. And the other side of that is, let me try to find one. What am I looking for?

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

CHRIS

30:40 What a specific job page will look like inside of service trade is when you go to start to capture. And this, I don't know you may not need all of this information. But the point being here is, hey, this is what a long job is gonna look like.

--- *Dispatch* ---

CHRIS

30:54 We got a day scheduled, another day schedule, another day scheduled. We start to build out 252 days. This can start to look long, right? When you're scheduling these all out by these different days. And then the other thing here that can start to get long is starting to add all the parks and the labor here, right?

--- *Dispatch ends* ---

CHRIS

31:14 So if you have an 18 month project, you can imagine how many parts everybody's using. If you're trying to capture all of these parts and service trade, it's not a, it's not a good workflow to capture all of those parts and service trade for a project with 10 guys that's gonna run 18 months long.

--- Type of work ---

CHRIS

31:34 That's what pro core does much better than we do. In terms of the scheduling. They don't they will do the clock events stuff, but the... the scheduling, they do that the... the project management side, they do that better than we do.

CHRIS

31:52 But it's kind of like the questionnaire is... is like where are you guys trying to draw the line of starting and stopping with what you're trying to do?

--- Tech time tracking ---

CHRIS

32:01 Like strictly clock events. If you need a schedule, all I need is a work order, a schedule and o'clock event that's fine. It's just gonna be a little long.

--- Tech time tracking ends ---

CHRIS

32:12 But if you're starting to, I mean if the goal there is... is in a year or two years to start to be used, more features and benefits of the application that you're using. Again. I would say that, hey, pro core on your construction stuff is going to be better than us and we will be better on your smaller install especially projects. And what pro core will be?

--- Pricing ---

STAN

32:30 I mean, would we be able to create like jobs so that we say, okay for a 12, you know, two, one, seven to eight, four dash one or whatever is okay for this 12 month period. And then same number dash B or to whatever is for the next 12 months?

--- Pricing ends ---

CHRIS

32:55 So, I'm not understanding that is that.

STAN

32:57 Well, and then you could still roll up to have like what I know. So you have like sub jobs that you can to contractually is not as clunky. But then you can still roll up for one big one is see on a total job basis.

--- Recurring maintenance ---

TANYA

33:15 I mean it to me and well, and service trade, each job is tied to a location and the location is essentially the job and stage where we think of as a job. I'd say just location like, you know, the bank of America building we're working on, and then you can create work orders are, which are what this is where it gets confusing jobs inside of service trade.

--- *Accounting* ---

TANYA

33:38 So as a location can have multiple jobs, service trade jobs. So you could have, you know, when you guys assigned somebody for a week or a period of time and assign them to a job that goes to that location and all that would feed back into Sage. So I think essentially, you could write, Chris have multiple service trade jobs on the one location, which is equal to a Sage job, which I know that sounds very confusing. But does that make sense Stan?

--- *Accounting ends* ---

STAN

34:07 I think so.

TANYA

34:09 Location screen like the look like go to location and show them all the job.

CHRIS

34:15 No, I got it right here. So.

TANYA

34:18 Yeah.

STAN

34:21 And are those system January or... or 10 that can be a user, can we create our own job? If you wanted to use a description?

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

STAN

34:32 Let's say and say, so like for our jobs, like we'll have like we'll break it down. So it has like a component that tells us what year we started. So he's example like 21, level two, level three XXY, you know, whatever it is, are we able to create our own job numbers which would be meaningful for us? Like that... that helps us identify what that job is, as opposed to just having a number that system generated?

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

CHRIS

35:05 So not exactly.

TANYA

35:09 Yeah. I understand what you're asking. It does generate. Unfortunately, it does generate the system. It could be that it's in the description. Now, some of that I find over time with older systems, people do that because that's the only way to like get some of those pieces of information out.

--- *Assets* ---

TANYA

35:26 It's not stored very well. You could put that in the description to be able to search on. So if you want to know the year that the job started or the level it was on, if... if you know, right now we're working on the 30 first floor, we want to have that as its own little component, you know, sub like sub job, we could do that.

--- *Accounting* ---

TANYA

35:44 And then as you move to a different floor, you could, you know... change the job, you know, have a different job with a different name associated with it. And then we could search on those different things... excel, Tanya... pardon?

KURT

36:02 If you added a tag to a job with that?

--- *Dispatch* ---

TANYA

36:05 You could do that too. Yeah, you could do that too. That's a good idea Kurt. We do have what's called tags and those are ways to search. So that would help you categorize like this job started in 2020 one. So if you want to pull out all the 2020 one jobs or, you know, jobs that were certain type, the tags are a little... items that we can add to a sub job or a job inside of service trade to be able to let, you know, search on it later.

--- *Parts management (purchase orders)* ---

KURT

36:32 Is Stan you see on this page? Job two two four, three three three seven one.

STAN

36:36 Yeah.

KURT

36:37 See the tag? You could Chris good and hit that... that hyperlink and type in, you know, 21 and whatever, what did you mention?

--- Parts management (purchase orders) ends ---

KURT

36:49 The specific name you wanted to give to a job?

STAN

36:52 Yeah, we might put like a customer who... who... who are... who are the contractors. So... yeah, it might say 18 T or something like that in there... and it's just... it's just for us to... to easily identify, you know, who the customer is.

--- Customer engagement ---

STAN

37:11 Like just the numbers. I mean, I know like different reports, you could probably at the customer name or something like that, but it's just a quick way for us to identify, you know, help us identify, you know, what that job is and who the customers. And so... and again, it's just, you know, just what we're currently doing, you know?

--- Accounting ---

TANYA

37:32 Sure. And like other screen you do. So like VS, gee is the customer. And then camden yards would be the location, which location?

STAN

37:41 Would...

TANYA

37:41 Be equal to the overall job. And like Sage... but the... the job number two two four three three three seven one is the kind of the... the job at service trade. We're... we're putting time too, and that can filter back to the location.

--- Accounting ends ---

STAN

38:21 Yeah. I... I think what that's going to be one of our challenges is no matter what solution reach. Yeah, it's there's going to be a pretty steep learning curve and it's just because it's going to be whatever it is. It's gonna... it's gonna be significantly different than what we're currently doing.

--- Implementation and ongoing support ---

STAN

38:38 And what about that? What about like training? Is that? And do you have like online, you know, if someone new comes on board? Did they have like a... a training thing that's Elisa? So they can just watch a video?

CHRIS

38:54 Yeah, yeah, absolutely. So we have a bunch of online training modules that... that your staff would go through for the office in... the field... the field is significantly less in depth than what the offices because the field is pretty easy.

--- Access to information ---

CHRIS

39:13 But then there is also, our staff will train you guys directly, right? Once we really understand specifically your workflow, your PM, who would probably be, Patrick would train you guys as well as onsite training, right?

--- Access to information ends ---

CHRIS

39:27 So we will also come up to your guy's office if you guys want, I'm right with you. We want to be respectful for the... the... the COVID conversation there. If you guys are up for it, we are willing to send our staff up to your guy's office for, you know, two days right before they go lives expected date and he does, he or she will do a bunch of training on site with you guys about the... the whole application.

STAN

39:53 And we could also just do like a WebEx. I mean, we have other locations as well. So it might be easier, just do like a WebEx.

CHRIS

40:02 That's right? We can do them via zooms. We have them set up for, you know, two four six our time periods if you need to. Typically, we start losing... losing the attention span somewhere that to... to, for our range, right? We're also sensitive to the fact that you guys are, you guys are still running a full-time business, right?

KURT

40:24 So...

CHRIS

40:25 That's kinda why that to, for our ranges? Do you guys typically give us two hours and we can spend two hours going over training part piece of the application, and then we'll reboot tomorrow or next week, whatever that is?

STAN

40:37 Yeah.

STAN

40:42 Hi, Tanya. Just... just to kind of pick your brains a little bit pair.

TANYA

40:46 Sure.

STAN

40:47 I mean, I've... I've done implementations pre prior other jobs before and everything like that. But just to get your thoughts specifically... what... what are some of the things we need to? Yeah, I get, no, I need to be sensitive to people or here and I expect resistance and so forth. But like just what... what are some of the things that that's help you in the past with successful implementations? One of the things that we need to, you know, look out for and so forth.

TANYA

41:23 I mean, I think it's definitely with these products, let's make or break in the field and it's getting those couple of, you know, maybe doing a smaller group that become the raving fans of it that this is so much easier. I feel like that's when it's fun. Well, when you kind of rolled it out to a small group of tax and they get excited about it. It's really starts to spread them. My God, this is so much easier than what I was doing before and just really giving yourself enough time.

--- *Paper process* ---

TANYA

41:46 And I feel like a lot of people feel like I can have it up and running and this super short amount of time and then everybody gets really pressed for it. And then it doesn't happen and it's you know, a lot of stress. So just giving yourself enough time.

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

TANYA

41:59 But yeah, I think service trade does a great job of really mapping out and having a project manager that's following you through the whole step is really keeping you on tasks, not waiting necessarily. Just like, hey, you have a busy consultant, call me when you're ready for the next thing and then you get... you get busy with your life and next thing a month, two months gone by, we keep you on track, helping you go along. So which a lot of times people don't have an internal project manager and it's nice to have a project manager that, you know, is helping you through that process.

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

STAN

42:28 Yeah. I mean that... that have a PR fireplace that worked in. I mean that was we had a whole team from each area and everything and... and we will have weekly

meetings and say, okay, what are the issues? And just to make sure we keep report and not working. We don't have that here is basically going to be me trying to push it along. And... yeah, so that... that I think having like a project manager to help with that would be that would be a big help. Yeah. Alright. I mean, I was there anything else that... that you guys wanted to show me or no?

CHRIS

43:14 No, I mean, I think the, I think the goal and Kurt correct me if I'm wrong was really to pick Tanya his brain, right? She... she used to sell the Sage project products, you know, say to your CFO. So kind of... kind of his brain on the integration piece and what would work and what makes sense for you guys... and... and kinda let you steer the conversation, have ask whatever questions you have for Tanya.

STAN

43:42 And Tanya just, I mean, I... I know, I, I've only been introduced to Sage, you know, a couple of years ago and I, I've seen my own home off myself, some of the limitations. But overall, I mean, like, what are... what are some of the, I mean, I'm not that familiar. I didn't come from like construction background and so forth.

--- *Accounting integrations* ---

TANYA

44:02 Okay.

STAN

44:03 What are some of the other options out there? Are they all similar? And, you know, just to get your thoughts are about Sage, just the honest opinion, it's up. Sorry we can work with it.

TANYA

44:18 It doesn't really. It... it just got an old, I mean, it does a great job. I mean, there's you know, it, but it's just old. It's old technology. You know, everybody has gotten, you know, there's so much data that resides in everybody's stage and getting it out is sometimes difficult and you with any system and the older they are, the harder it is, it's you know, it's Crystal reports, it's running replicated databases. If you guys, I don't know if you guys have gotten to that stage where you're replicating your database to be able to run reports. I mean, you know, nowadays everybody's looking to tap into their data and have, you know, use BI tools, you know, Tableau demo unit, you name the BI tool, being able to really like your executives like that, being able to see a dashboard view of what's going on and, you know, when you're with... with these older technologies are really restricted from that. Think... that's some of the issue that companies run into with Sage is that it's a lot of reports. It's a lot of, you know, manual creation of things and, you know, we have Christmas looks like he's bring it up. Is our BI, to one of the BI tools that we work with is called quick site where, yeah, we're pulling the data out of service trade into a nice dashboard that I can view this information very high level. And then we've even got some customers who are using other accounting products that are more modern and they're connecting accounting data with their, you know, their service data and getting like a complete picture of everything. So then this becomes what, you know, some users

just look at, they don't go into their accounting software because this gives them what they need, all their information, sort of summarized with... with nice pictures and graphs that a lot of times executives like to look at. So, I mean, you know, I always feel like stage is like the all diesel track.

--- Accounting integrations ends ---

TANYA

46:06 It starts up. It's not pretty. It smells. It's this and that, but it works, you know, and so a lot of customers are on it for a long... long time. I mean, but I think as younger folks come into the business and newer technology like BI tools come out, it's you know, where I used to work. I mean, every pretty much every stage customer. I felt like Heather, I am leaving Sage because they just want a new technology. It's hard to find, you know, 20 something year. All that, you know, is excited to work on stage every day.

STAN

46:36 My previous employer, we... we had the, we had any other wasn't in construction, but we had you well with Solomon and then it was acquired by dynamic.

TANYA

46:46 Yeah, but then they.

STAN

46:47 Got that and then Microsoft acquired them and they got to the end. We wanna, we... we switched over to like Netsuite.

TANYA

46:54 There you go. Same kind of story yep.

STAN

46:56 Yeah. I mean, but that... that was that there was almost like we... we... we thought we started acquiring businesses and businesses outside of the countries, we have to do with different currencies and so forth. And then we wanted everyone on one system, so.

TANYA

47:09 Yeah.

STAN

47:09 In that case, it was very hard to make a switch but we were forced to just based on that, how our business change much, but I don't know, I don't know if that's the case here.

TANYA

47:22 Yeah.

STAN

47:23 Perceive that... that kind have changed, I mean.

TANYA

47:28 Yeah.

STAN

47:29 Sorry. Go ahead. Yeah. So it's... it's just, I think it's just Sage works for us. It's not ideal. And I think my counting perspective, there are certain things I'm not crazy about can make it work. But, yeah. And that, that's where I'm kind of like a little bit, you know, I would love to... to do, but I don't know if we really need it. I don't know. And that's... that's... that's the, again like I say, I'm trying to figure out that... that... that... that fine balance of, you know, getting us a little bit more modern, but, you know, not go go crazy. We're I'm the only one that would love it and everyone else hates it.

--- *Customer engagement* ---

TANYA

48:09 Right? The service trade, the results, you know, there's the comments we get from the field or very positive with the interaction, the use of service trade. It's a very easy to use tool for the field. I think that's always a big win and getting them on board is that it's buttons.

--- *Paper process* ---

TANYA

48:26 They can push it's very easy. It's not a lot of, you know, information on the screen. They're having to read through to figure out what to do and what to touch, which gets better adoption, which then get you what you need, which is the time electronically instead of having to weed through all these paper time sheets.

--- *Invoicing* ---

TANYA

48:45 So, I think, you know, you can have obviously baby step into service trade with doing time collection and then maybe moving into, hey, I've got a couple of customers who would love to get the service line and get their invoice, you know, like chronically sent to them and doing some billing out of service trade for some customers that maybe most store and Sage. And then, yes, I think it can be baby stepped into.

--- *Accounting integrations* ---

STAN

49:09 And if you have you, what have you heard about Sage SSO as... as that boat, you know, any feedback on... on?

TANYA

49:21 I mean, it does the time collection. You know, if you were looking at just from that aspect, I mean, but if you're really gonna start to get into doing some more, you know, creating using the dispatch board and creating work quarters that they get sent out, you know, a work order of what needs to be done, then you would have to implement the service management module and Sage.

STAN

49:42 They...

TANYA

49:42 Would be, you know, implementing kind of two components, getting service management setup and then... then tacking on the mobile component, which would be Sage service operations.

STAN

49:52 Hi, there. Hi. Alright. Well, I appreciate all the time and then showing your... your thoughts here a lot. Yes, food for thought.

--- Accounting integrations ends ---

STAN

50:07 I guess I have to think about this a little bit more. And I talked to John and you and as well as some other folks... try to, you know, list all the pros and cons.

TANYA

50:18 Beach...

STAN

50:19 And everything... I do like, there's a lot that I like about service trade.

STAN

50:31 I'm not sure yet. I'm if... if it's the right fit for us yet. I... I think, you know, we... we may try just... trying to the Sage BuildOps option just because it's cheaper just to get people introduced to the concept of entering time as opposed to faxing it or emailing it in. But as... as we do that, we may determine that, hey, this really doesn't work for us anymore. So, no, I think that's kinda like what I'm leaning towards the honest just to kinda slowly introduce. And again, we would do this, you know, just for certain locations or projects first and everything just to kinda see how it, see how it goes.

--- Dispatch ---

CHRIS

51:22 You guys work with a quarter?

STAN

51:25 Yeah. So we are working with recording. They... they support Sage... for us.

CHRIS

51:33 Right.

STAN

51:36 You, are you familiar with recorded?

CHRIS

51:37 Yeah, we know accordingly tiny knows them from her previous slides and as well as for the life.

TANYA

51:44 Hi.

STAN

51:47 Anthony madonna show, phone number, sir show is more like the... yeah.

--- Dispatch ends ---

STAN

51:55 Yeah. Bob child's there's a couple of guys that we've worked with over the years. Yeah. So I think, yeah, I'm gonna talk this over again with... with John and you just to get their... their thoughts. And, you know, I, again, I... I do like service trade. I think it's... it's...

KURT

52:19 Do you guys do a quick question? Yeah. Can you just give Stan a, what's your experience? Again? I'm I've only been, you know, I'm a short timer here so far, Stan, what, what's your experience with customers in SSO VS service trade?

CHRIS

52:34 I think... you know, I think it's a difference of probably the 20 first century, 20 essentially, right?

--- Accounting integrations ---

CHRIS

52:42 SSO, SM, the search Sage service management is it works? It's okay. It doesn't have a lot of the bells and whistles that we have. It doesn't have the... the fluidity that service trade has its... probably and look, I'm just speaking Frank and honest. It's probably a little bit clunky... in terms of navigating, but it... it works, it has served its purpose, right?

--- Accounting integrations ends ---

CHRIS

53:07 Tanya, can, how long has that been around Tanya?

TANYA

53:12 It's probably been around.

CHRIS

53:14 Years or so.

TANYA

53:17 So five, so they're just texture looking for. So maybe a little bit longer late here. So, yeah, it's been around.

CHRIS

53:22 So, so it is a rebranded version of... of I have fast, I think... you know, and... and I think Sage is focus on their core products and that's the ERP system that's their focus. So, if you want to have a dialed up buttoned up service application, right? We're... we're the cadillac.

--- Purchase decision ---

CHRIS

53:43 So that's kinda my thought, right? And I, you know, I kind of challenge Stan and say, hey, I mean, you guys, the goal here is to migrate to something like a service trade. I challenge you guys to kind of rip the band aid off sooner than later. But obviously, I'm biased... and I... I apologize, I turn my video off because my internet was getting unstable...

--- Purchase decision ends ---

KURT

54:04 And instant my two cents is a little that I've learned. And again, I'm honestly as days long, right? I've been at this service trade for four weeks but really working for two months. You know, what I've learned is that most firms like yourself, we're in a pension, they adopted new ERP functionality. And then over the years, they had a representative from that ERP company speaking with them and they would gripe about, I wish we could do this. I wish we could do that. So you had just like Chris said, an ERP in accounting functioning software, try to solve field operations, workflow issues.

--- Paper process ---

KURT

54:46 And that doesn't make a whole lot of sense to me. And I think like Chris said, they, they've done a, you know, it's rudimentary does a decent job, right? And get you there. But I think what you might find stand in my opinion is as if you went that route if it's clunky, and you're trying to get the office to it, you know, do a 180 in terms of technology.

--- Paper process ends ---

KURT

55:09 The technicians I have to say, listen, this thing stinks. I... I, you know, we don't need this technology. Let's go back to the paper. Whereas I think in my opinion with service trade, it's... it's so much easier and more user friendly that... that adoption might be easier. Now, you asked earlier about, you know, success in terms of adopting new technology, I would say that... you know, a name like y'all came would be a high profile addition to our 750 clients, coast to coast, right? We've been doing this 10 years but you okay and would be a nice addition. And we get the eyes of senior people in Raleigh, North Carolina. And I think any concerns you might have would be delayed by they're willing they're interested in making sure that if you did go with service trade the day that you turn it on, you know, you'd be carried off the... the... the floor, you know, by your employees because it was such a success.

--- Pricing ---

KURT

56:05 We... we wouldn't want anything but 100 percent satisfaction. And... and most interesting. I think this really hits home for me is if we didn't add another client in the rest of the year, we would still grow at 20 percent. Would that means is clients like you who only need is potentially for time card and dispatching, while very important, maybe don't see the use of other features, but we have clients that come back and want additional features such as partsledger. So just something to think about... you know, just... just my two cents.

--- Dispatch ---

STAN

56:41 Yeah, no, I appreciate it.

KURT

56:44 Yeah, I mean that.

STAN

56:45 I... I...

KURT

56:46 Completely hear you.

STAN

56:47 About, you know?

KURT

56:52 Trying to get, you know, if we...

STAN

56:54 Introduce a product as not clunky, that it may, you know, people, this is like...

KURT

57:02 Just the, if this.

STAN

57:02 Is like their first introductions are going... to automating somewhat, it may turn them off completely and I... I am very... very sensitive to that and aware of that.

--- Dispatch ends ---

STAN

57:13 And... and that's... that's the thing that I'm trying to be very careful about is we wanna... we wanna.

KURT

57:21 We may only get one.

STAN

57:22 I have to do that in a way and... and I get that. And that's why I wanna make sure, try and make sure we get the right solution for us, where we're at and that, that's...

KURT

57:35 I got the thing that I'm still.

STAN

57:36 Just not 100 percent comfortable with the service trade is for the bigger jobs.

--- Implementation and ongoing support ---

KURT

57:40 Where we were talking about like that's the part that I'm...

STAN

57:45 Yeah, like you said, it... it... it... it... it can get very messy if you're going to have like all the...

KURT

57:51 Scheduled out there.

STAN

57:53 So...

KURT

57:54 That, that is.

STAN

57:54 One thing that I'm a little bit... you know, where?

KURT

58:00 Now... on the service trade side... yes, question for that, would... would technical account manager be able to help those situations?

--- Implementation and ongoing support ends ---

CHRIS

58:12 A little bit, yeah, a little bit. Yeah, I mean, Stan is right. You know what I would argue is, hey, there is no one job. There is no one tool for the job you're trying to accomplish, right? Just doesn't exist. There is no one all encompassing thing that's going to do everything.

--- Type of work ---

CHRIS

58:27 Well just doesn't happen. So, for example, you do pro core... pro core is going to handle that large stuff. Great. It's not going to handle the small stuff, right? You do service trade from the handle, the small stuff. Great. It's not gonna handle that large stuff. Great. Right?

--- Type of work ends ---

CHRIS

58:42 It's kind of like why guys carrier tool belt because I need a flat head and I need to fill upset and I need to hammer and I need to drill down and I need a wrench, right? They need tool for that job. But yeah, I mean, the other concept there, Kurt is right to where we have what we call it Tom a technical account manager and this is going down the road a little bit, right? Looking two Miles down the road. But that's somebody that... do you have a recurring service subscription with that basically

does some of these clean up in your account. So if you have a large construction job that's starting to get clunky, you can use it team to go ahead and clean it all up and essentially wipe out a bunch of the stuff that you don't no longer need. But that's kind of two Miles down the road once you're up and running and you're utilizing the app and you're saying, hey here's where we need help and then we can come in and help you guys on that aspect.

CHRIS

59:36 Alright. So I think we'll let you go, have that conversation with you and John... keep us posted. Let us know how that conversation went correct? That may reach out next week if that's not too early... just to touch base and see if service trade is still kind of in conversations.

STAN

59:54 Yeah. Okay. No, thank you very much for your time. I... I... I appreciate it. And yeah boy.

KURT

59:59 Keep you guys posted and if you have any, you know, if later in the day, you... you think of something you want to ask Tanya if you want to put an email or if you want to set up another 15 minutes at some point early next week, you know, we're here for you.

--- Purchase decision ---

KURT

1:00:11 Like where again we liked this consultation of approach, we've we want you to make the right decision. So, you know, again, we'd love you for you to come to service trade, but we... we want what's best for you. Okay? And... and... and, you know, we're happy to provide any answers if you're not getting the answers that you need.

--- Purchase decision ends ---

STAN

1:00:29 Yup. Okay.

KURT

1:00:29 Great.

STAN

1:00:30 Alright, thank you very much.

TANYA

1:00:32 Nice to meet you Stan.

STAN

1:00:33 Nice to meet you.

KURT

1:00:34 All right. Thanks. Bye. Have a good day.

STAN

1:00:36 You too.

The End