ServiceTrade Demo with Christian Brothers Mechanical Services Inc

Dan Waggoner with Christian Brothers Mechanical Services Inc
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Participants

ServiceTrade

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Christian Brothers Mechanical Services Inc

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Other

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Transcript

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

KATIE

0:01 Can you hear me? Okay? All right. I think I might leave my camera off because I am at my mother inlaws and we're making it do?

DAN

0:15 Can always do the blur your background too.

KATIE

0:17 I know I was trying to figure out how to, how do you do that?

DAN

0:21 If you click the little arrow next to the stop video button, it should be one of the options.

LISA

0:26 Right there.

DAN

0:32 Yeah. There you go. I didn't bother me anyway, but sometimes it helps me not be distracted of what's in my own.

KATIE

0:42 Yeah. I'm literally like on the computer's on bed, so... it works.

DAN

0:50 Well, I appreciate you joining.

KATIE

0:52 Yeah, yeah. I think I...

ADAM

0:55 A good conversation.

KATIE

0:56 I do have to jump a little bit early like halfway through, but.

DAN

1:02 Yeah, I'll just introduce you letting them know that you're going to be probably falling off the call at some point. So, won't be awkward when you disappear.

KATIE

1:15 Two four.

DAN

1:17 Yeah.

DAN

1:24 Had a pretty good day.

KATIE

1:26 Yeah. Gotten contact with a company that had filled out a demo request. So I got that set for.

LISA

1:39 Or Friday. So that should be good.

DAN

1:42 Nice. Inbound is always good.

KATIE

1:46 Yeah, it is. I'm I was a little surprised that nobody had gotten in contact with them. Was there, what's that, what was the company... it's called patent AC, but he filled out a demo request on the ninth.

DAN

2:08 Wow.

KATIE

2:09 Yeah. So, I was like, what do you mean? We haven't gotten that was almost a week ago, like... those are.

LISA

2:16 The best leads.

DAN

2:18 Yeah, real.

KATIE

2:20 So, I was like, I called him and he picked right up and was all about it. So nice.

DAN

2:33 Hey, Adam.

DAN

2:42 Right.

KATIE

2:45 How was it?

DAN

2:46 Going there? Adam?

ADAM

2:48 Good. How are you guys doing?

KATIE

2:50 Good, good. How's your day?

ADAM

2:54 Day going very busy? Busy. Yeah, it's our busy season. So, yeah, not a bad thing.

KATIE

3:03 Yeah, definitely.

DAN

3:07 Yeah, I've been here and I always thought sort of the summer was all just the busy season.

--- *Type of work* ---

DAN

3:12 I'm sure it is. But I hear that for you guys specifically mechanical contractors, they've got sort of quite a bit of deadlines running into when folks are going back to school and...

ADAM

3:23 Definitely. Yeah. One of the big projects we're working on right now, we're doing a school district and this Friday is, the last day for working out there.

--- Type of work ends ---

ADAM

3:34 They go back to school on Monday. So, we got a lot, we got 15 guys over at that job right now trying to get everything up and running. So the kids that are conditioning, so.

DAN

3:45 Exactly.

ADAM

3:47 Yeah. Where are you guys calling in from?

DAN

3:53 So, I am in North Carolina, Raleigh, North Carolina that's where service pages headquartered actually out here, and Katie is in, she's in California. I forget what town?

KATIE

4:03 Yeah, I'm in TAM, I live in temecula?

ADAM

4:06 Okay. From...

KATIE

4:06 California. Yeah. So, not too far from you guys?

ADAM

4:09 No, yeah, no, not at all. I think Lisa and Steve should be joining us here shortly. I think they were just wrapping up a couple of calls right now, so.

DAN

4:19 Okay, cool.

KATIE

4:21 Yeah, no worries. You guys are in mirolama? Is that correct?

ADAM

4:26 Yeah, it's kinda near like east mail corona area.

KATIE

4:29 Yeah, nice. Yeah. I grew up in your Balinda.

ADAM

4:33 Cool. Okay. I'm in area actually. Yeah.

KATIE

4:37 Yeah, cool.

ADAM

4:38 So, yeah, a lot of our guys actually live in that area. One of our other, my other sales reps lives in oral and, too, and so not orange county area.

KATIE

4:47 Yeah, I love it. My parents are still there. I'm still there probably every other week seeing them... and fullerton bra, sentra all over.

ADAM

4:59 So, cool. Cool. So.

DAN

5:04 How many sales reps do you manage?

ADAM

5:06 Four.

DAN

5:08 Okay. Yeah.

ADAM

5:09 So, we have four, like outside sales reps, I guess you'd say account executive.

--- *Type of work* ---

ADAM

5:13 So we do like kind of like sales as far as like new client acquisition, maintenance and service agreements and retrofit projects and things like that. And then we have two inside sales people as well that do all of our like repair quotes and things like that. So.

DAN

5:31 Gotcha. It's all, the pull-through revenue and Susan, and it sounds like you're only managing, the new?

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

STEVE

5:37 Richard?

ADAM

5:38 Yes, correct. Okay. Yup.

DAN

5:42 And does Scott head up, the inside focus?

ADAM

5:45 Yeah. So yeah, I'll give you a little while we're waiting. So, Scott sands is our service manager. He oversees all of our technicians in the field. So we have approximately like 30 service technicians in the field that live and work all over southern California basically. And then Steve nile is our VP of service. So he's kinda like our overall operations manager he oversees. And then Lisa is like our office manager. So she oversees everyone that's in the office, all the administrative positions and office staff. So I forget how many we have in the office.

--- Type of work ---

ADAM

6:25 I think there's maybe nine or so eight or nine people in the office that she manages. And yeah, I just oversee, the sales side of it. So another four people for that, so.

DAN

6:38 Gotcha.

ADAM

6:39 Yeah. And then we have, you know, a retrofit team too that's another 10 technicians basically that's part of our service department.

--- Pricing ---

ADAM

6:48 They're the ones that go out and do all of our projects and things, and that pretty much wraps up our service department. So, you know, Christian brothers, we're a pretty large company. We're like total, we're like 250 plus employees and we do, I think close to 100,000,000 a year, 75 to 100 a year.

--- Type of work ---

ADAM

7:07 Our service department is responsible for about 10,000,000 of that. So just kinda giving you the size of the company and like where we fit in a little bit. So we have a pretty large new Construction side. We have an electrical and controls division that's called CV controls. So how many guys, they have electricians, and controls guys they have on that side, but it's they have a pretty good sized group probably equal to, our service department. So, yeah, that's kinda how.

DAN

7:40 Yeah. I appreciate, the run down there. Yeah, absolutely. Yeah. I saw your website. There's quite a crowd of you all out front of the office. So I assumed you all were also heavy into Construction, had several divisions in touch.

--- *Accounting integrations* ---

ADAM

7:57 Yeah. So the new Construction sites like the biggest side of our company, but, you know, right now, the, as far as, the software upgrade we're looking at is specifically for our service department. So, perfect. Yeah.

DAN

8:11 Well, that is where we specialize so that's music to my ears... are you, so I know that Henry who set the meeting up, with Steve, I know he had spoken to him a little bit about, you know, sort of the service operations and using SSO, an Sage, 100. As far as for your sales team, the specifically for new customer acquisition. How do you manage those processes?

--- *Access to information* ---

ADAM

8:49 Sorry, I think my internet connection is super slow right now. Can you hear me?

DAN

8:53 I can, I, did I cut out on you or?

ADAM

8:55 Yeah, you cut out. Sorry. I think it's me so.

DAN

8:59 Well, it could be me too because I, I'm getting all these iPhone alerts saying there's an emergency flood evacuation in my area.

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

DAN

9:06 Luckily, I'm on the sixth floor. I'll just be sort of looking at the river from up here. But so, the weather could be affecting my connection as well. So apologies.

ADAM

9:16 Okay. No worries. So, sorry, can you repeat your last question?

DAN

9:21 Absolutely. Yeah. So I was just curious. I know Henry had talked a little bit with Steve about, you know, using SSO and sort of some of the goals with the overall operations and delivery of service and they touched on some other things and aspects of sales and such.

--- *Accounting integrations* ---

DAN

9:36 But I'm curious if you use a different or any tools or any software tools outside of those for managing, your team?

ADAM

9:46 Okay. Cool. So that's a really good question because my, one of my goals with the new system is that it fully incorporates everything. So right now, on the sales side, we don't really use any type of CRM based platform. We do have one system we use it's called convec, and it has a CRM platform built into it, but it's more of a prospecting...

LISA

10:13 Tool.

ADAM

10:13 That we use it for. So we're not really actively using it as a CRM right now. So what I'm hoping is whatever new service platform that we bring on is going to have that like sales functionality to it as well.

--- *Accounting integrations ends* ---

ADAM

10:28 So we would love a system that we can, you know, enter new client information and be able to bid directly out of that system and run some type of workflows or something like that to pass, the projects from estimating to propose to, you know, to the next phases, of the work. So that's definitely something we're interested in.

DAN

10:51 Yeah, absolutely. Well, let's see here. So while we're waiting on them.

ADAM

11:00 Text to me, it sounds like they're going to be jumping on here in a minute, so.

DAN

11:05 No, that's great. I was gonna say, I mean, so that falls right into our wheelhouse, right? So we offer proposal management specifically for mechanical contractor. I don't know. Have you ever heard of Northboundary?

--- Type of work ---

ADAM

11:17 No, I haven't...

DAN

11:18 Okay. Let me see here. We'll get into some of it during our demonstration, but, yeah, specifically for maintenance agreements, right? So being able to manage those proposals, make sure you're tracking your, you know, opportunities that are out there. And once they're one, you just move them over to service trade where you can deliver the service.

--- Assets ---

DAN

11:46 So it's essentially a module for your sales team specifically designed for them to help them easily, you know, survey a site, record equipment, information, recommendations, you know, the hour it would take based on the equipment and provide a proposal with the customer, track all of that activity, track your sales people's activity.

--- Customer engagement ---

DAN

12:06 And once you win those proposals, right? Just push it over to service trade where it'll have the recurring services set up based on the pricing that you have. You can manage the contract from there. And then service trade is really more of your tool for capitalizing on that pool through revenue, which will we'll look at today, but streamlining the, you know, repair opportunities from those maintenance calls.

--- Customer engagement ends ---

DAN

12:30 And obviously, it's gonna collect the data and information to track back to the maintenance, how profitable were we and such, but it sounds like that could be right in your wheelhouse, you?

ADAM

12:39 Yeah. That's exactly it. So we would love, the ability to be able to bid and estimate maintenances and projects out of the system and then be able to like you're saying, kinda just push it over to the next person in the queue that has, you know, to open the jobs to order equipment and materials and things like that. So it's definitely what we're looking for. Do you have the guys? Do you have the ability to do like field quoting in the software?

DAN

13:05 We do, we do, are your technicians quoting right now?

ADAM

13:08 They are not, no, but it's something that we're entertaining the idea of, you know, if a new system that we select offers, it might be something we wanna do.

DAN

13:18 Sure. Okay. Yeah. The way that we currently in Steve, welcome?

STEVE

13:25 Hey, how's it going?

DAN

13:27 It is going well. Do you also have Lisa and Scott with you?

STEVE

13:32 Lisa should be hopping on. Scott is out in the field.

DAN

13:37 Okay. Gotcha. Well, I have Katie mallon here with me. She is our field sales manager in California. She also covers Arizona and Nevada, but she's based in temecula. I say that, right? Katie.

KATIE

13:53 Yup.

DAN

13:54 Yeah. So, right. A little bit south of you all. And just for warning, I believe she's got a meeting in about 15 minutes. So she'll fall off, but I'll be here, to carry on with you all. And my name's Dan. I'm the site manager as team mate. We typically came up on these type of things. And so I work from North Carolina at the service trade headquarters and I'll be the one walking through the demonstration for you today.

STEVE

14:21 Okay. Wonderful. We got lots of questions.

DAN

14:27 All right. Well, excellent. Go ahead.

STEVE

14:33 Yeah, we've looked at five different companies so far. I believe you're going to be the last one we look at, so.

DAN

14:41 I believe you're right?

KATIE

14:42 I believe you're right? The grand family. Okay. Yeah. Well, Steve?

DAN

14:51 Henry had pointed out that you all looked at five, you know, or several different options. So, so I would guess that you've got a pretty good idea of your win criteria. At this point. Adam was telling me a little bit about it from the sales perspective and bringing that team in to sort of centralize all of that activity and gain that visibility and streamline those activities as well and processes between the divisions. But from your standpoint, what's your overall goal, in criteria? Is there anything you'd like, to start with?

--- *Accounting integrations* ---

STEVE

15:24 Well, Adam probably mentioned workflow is one of the big important things for him. For my perspective, it's gonna be reports, different types of reports, profitability reports and such that I work on the operations side of the business. And one of the big things that our CFO and being able to talk to Sage 100 that's gonna be a big issue or a big concern, whether you could do that or not.

--- *Accounting integrations ends* ---

STEVE

15:52 And then Lisa's perspective is going to be from the dispatch board, and how well your invoicing is and aging reports, things of that sort that she's gonna be able to see. Okay?

DAN

16:10 Sure. And how about Scott since he's not here today?

STEVE

16:14 So, have you more questions about profitability as well for his technicians?

--- *Paper process* ---

STEVE

16:21 You know, he's accountable, you know, for those vans and how much they produce every month... checking on his technicians, see how well they're producing?

STEVE

16:35 Other that, you know, dispatch board is important to him as well and his guys dispatched out properly. What they see in the field, the reports they'd be able to see. Yeah, things of that sort.

--- *Purchase decision* ---

DAN

16:51 Okay. Got it. Well, Henry jotted down, Henry who set this meeting up for us? Jotted down a few notes as far as, you know, some of the workflow issues, but they're pretty short hand. Are there any, I mean, I guess I'm trying to get an understanding of what's pushing you all, to make the jump.

--- *Accounting integrations* ---

DAN

17:15 Now, you obviously deep into some evaluations. Is there anything specifically? Maybe it's new growth opportunities or certain goals you have for the company in the next year, maybe two years?

STEVE

17:27 Well, the system we have right now is SSO. It's a program that works with Sage, 100. It's their software program and it's not a very good program.

--- *Paper process* ---

STEVE

17:38 We have a lot of problems with things such as... thinking time sheets. You know, it takes Lisa a day and a half to do time sheets all done by hand. You know, the kinds of things, you know, we could speed up the process in the office and cut down on, you know, all the extra work that's being done.

--- *Paper process ends* ---

STEVE

18:03 You know, that necessarily doesn't have to be all these systems offer that... you know, that's going to be how we're gonna sell it to the owner and the CFO. So we are looking for... some different points that's gonna sell. You know, we can save money, you know, what, what's the system gonna do for?

--- *Accounting integrations* ---

STEVE

18:25 So, I think they're pretty much. I know the owner is aware of all the struggles we've had through the years with this SSO program. And, you know, just to do reports, we're gonna do like a separate Crystal report, go into excel and I know it takes the CFO like two days to do one report, you know, to put something together and it's never quite right.

--- Customer engagement ---

STEVE

18:46 You know, it's always just half of what I need instead of everything. So that's pretty frustrating. But, okay, you know, I mean, also, you know, our customers having a customer portal to where they can see the history of everything that's been done on their side. You know, how well the invoicing is being done for them? And, you know, everything that goes along with the customer happy with the way we do business. So.

--- Customer engagement ends ---

DAN

19:19 Absolutely. Well. How, how long have you all been on set?

STEVE

19:24 Gosh... I would say since 2010.

DAN

19:31 Long time.

STEVE

19:32 Gotcha. Yeah.

DAN

19:36 Well, Lisa, and shift gears a little bit here. Lisa. I just wanna acknowledge that you've joined us. Great to have you.

LISA

19:43 Yeah, sorry, I apologize. I was in a little meeting prior to this one.

DAN

19:49 Awesome. Well, we're glad you're here. Quick round of introductions is the third time I'll make it short, I promise Adam, but I've got Katie mallon with me. She's, the field manager here in California. And so she works alongside me. I am the inside sales manager for California. So I am out in the service state headquarters in North Carolina, but we're happy to be meeting with you all today and look forward to getting into it here.

--- Purchase decision ---

LISA

20:17 Cool. Thank you. Happy tomorrow.

DAN

20:22 Yeah. And so... as a whole, my plan for today and we've already sort of started this discussion right here from you all. Here are your goals here here's. Some of the issues you might be having and where service trade may be able to help that's where the demo will come in, right? I'll demonstrate to you how the product can suit your needs. We'll talk about... how to get your hands on it, right? Give you the information you need to be able to determine the next steps, right? And so typically towards the end of our meeting time, if you all seen some value in what our product offers, then we can determine next steps together, plan those out and go from there.

--- Type of work ---

DAN

21:02 But... like I said, we've already gotten sort of into your half of things, but I did wanna touch on a couple of other points here. And Henry had a note, that I liked quite a bit which is it looks like your service division is primarily constructed off of you're essentially selling maintenance agreements and you're not really working for anybody outside of those, right?

--- Recurring maintenance ---

DAN

21:25 I mean, it's customers that are signed on with you. Those are the ones you're servicing. That, is that about right?

STEVE

21:33 Yeah. For the most part, I mean we do get the call INS and then when we do, we Chase them for not get the main contract.

DAN

21:44 Gotcha. So the first thing I think of when I think maintenance contract, is pull through revenue and tracking, you know, the repair opportunities that come from those quarterly monthly semi annual visits. So I'd love to hear a little bit about how you guys are handling that now and whether that's a pain point or not.

STEVE

22:06 No, this one is made, this contracts and how we get them.

DAN

22:10 Well, more so on the delivery of the execution, right? So you're out there for a quarterly visit, to a customer site.

--- Recurring maintenance ends ---

DAN

22:19 You're doing the maintenance that that's agreed upon. But then, you have documenting deficiencies, right? So repair opportunities that from what me and Adam were talking about earlier, those seem to be getting pushed to the service teams, inside sales managers, account managers and quoted out, for repairs and such. But that being the higher margin work, I was just curious how you felt that process is working now and...

--- Paper process ---

STEVE

22:45 That works. I mean, it's not lagging anywhere. We got two guys pretty much inside that's all we do is estimate repair requests from the technicians. So the tech literally have to call in and tell them what's going on. They actually help them find parts that are more difficult to locate. You know, all that information is sent in an e-mail or text or phone call to the estimators and then has to make the work out estimators track all their work, the document, every project that they or every service repair that they've got out there. They keep a list in excel sheet and they also call on those repairs to the customers as well to get approval. There's a follow up process done. Again. It's all done separately on separate sheets, you know, but we have all those processes in place. Okay. Yeah. I mean that's...

DAN

23:52 Gotcha. No, that's very insightful. I appreciate it. So, I mean it sounds like the texts are having to stop what they're doing to and give a phone call to one of those guys, and hopefully they pick up and walk them through that so that they can document it in an excel file or whatever the list they have is for that customer.

--- Quote templates ---

DAN

24:14 And from there, they're just typing up a quote, determining parts, getting a quote out to the customer. Is that typically like a PDF format or are they sending those through? Say?

STEVE

24:25 It's all PDF. Yeah, we have proposals that are all on word are all word documents. Our estimating is done on an excel sheet that we made up.

--- Accounting integrations ---

STEVE

24:40 It's very basic but they're very easy to use, you know? And actually we're thinking about actually transferring those over into the system, right? We still use that excel sheet that we've got set up and the proposal as well. If we can take those documents and move in the system as well as we continue to use the same documents we use now, unless you got a better system, you know?

--- Paper process ---

DAN

25:08 I think you're gonna like, my suggestion here. And, and as far as the, when you say taking the proposal in those documents and putting them in the system, I'm guessing that sort of like templates for different types of proposals you're sending?

STEVE

25:21 Yes.

DAN

25:22 Okay. Gotcha. And the excel sheet is mainly just holding customer information.

--- Quote templates ---

STEVE

25:28 No, it's just the estimating the, they just plug in the numbers and it gives them a price, got all the different things you need for service, you know, which is like for instance, webbing charge trip charge, you know, vacuum charge, recovery charge all those things in there. So they know they have to go down that list and check off whatever it needs to be done.

--- ST app contracts and pricing ---

STEVE

25:57 You know, for instance, if we check EPA, they know what to check off to add to the cost. So once you plug in your number and I'll give you the price for each individual things.

DAN

26:10 Gotcha. Okay.

STEVE

26:12 Yeah. I've been using that. I've been using that for many years and it's always been pretty good. I just increase, I get a little price matrix off to the side and we just change the matrix or the markups as years go by.

DAN

26:28 Gotcha. Yeah. And I mean, it sounds like that's definitely an important revenue stream for you all. I think that Adam mentioned that service responsible for maybe 10,000,000 a year, give or take. And do you know, the breakdown as far as, hey, what's maintenance versus what's repair and special project retrofit type?

--- Type of work ---

STEVE

26:51 Year today, we're about two point five for service repair. Retro fit is around two point two and the rest is maintenance and maintenance are over a 1,000,000 right now. I think... okay on.

DAN

27:13 You...

STEVE

27:13 Got it right here. So the maintenance is one point one.

DAN

27:19 Okay. So yeah, you're I mean, you're hitting a little bit above that two to one ratio.

--- Type of work ends ---

DAN

27:26 It looks like we lost Lisa or we lost Katie that's right? She had to leave though. It looks like, yeah, I mean, you guys are hitting that two to one ratio a little bit above that as far as repair revenue versus the maintenance.

STEVE

27:38 Yeah, yeah.

DAN

27:40 Well, as far as you all decision making process that's another note that I have here from Henry.

--- Purchase decision ---

DAN

27:48 He mentioned that you all were motivated, to make a decision soon and I can only imagine after sitting through talking with guys like me for five different rounds. So do.

STEVE

28:02 Yeah. We gotta sit down at the end of the month with the owner and the CFO to tell them what we have and we got to sell them on the whole idea so that's let them know what the different programs offer. You want the top five reasons why we want to go to this program, you know? So we're working on that right now. So, Zoom meetings with all you guys out there, just trying to find the differences in what's gonna work for us best, you know?

DAN

28:37 Yup. Yeah. So Henry mentioned to me was it sounded like some of, the folks you've met with so far? Steve, haven't necessarily been able to set you up with customer references or I guess earn, your trust that they can handle what you need. I mean, you guys have a big operation going on obviously, does that, is that about accurate or?

STEVE

28:58 Well, there, there is references out there, but I haven't seen any hvac references.

--- Purchase decision ends ---

STEVE

29:03 I see one of this with like southern California, which is a pretty big customer. You know, some places do very big customers, you know... but I haven't seen any hvac customers that they've given us reference to. So I use BuildOps on Texas that's where we got the BuildOps recommendation. Sorry, they are out there. Okay?

DAN

29:35 Do you have, a crowd favorite right now? As far as what you looked at so far?

STEVE

29:39 Ops and one called Omaha or which is go mobile change. Those are two right now that are on top.

DAN

29:53 Mobile change. I don't know that I've ever heard of that.

STEVE

29:58 But we never.

DAN

29:59 I...

STEVE

30:02 Never heard. The prices are very reasonable, which is one of the things I like, you know, my question to them as well. You're so reasonable, we wonder, you know, good you doing? They've met everything that we ask for, you know?

DAN

30:23 Okay. Well, that's a good question. I think that to keep in the back of your mind, well, I definitely want to jump into this, and present some of the product to you here. But Lisa, Steve, Adam, do you all have anything that I missed or that you want to specifically point out to make sure we covered today that's important to you?

LISA

30:48 Well, are you gonna, you're gonna pretty much show us the like what you have for dispatch and, you know, opening work orders, and how your system works with quotes? And do you have dashboards, things like that?

--- Purchase decision ---

DAN

31:05 Yeah. So my plan is to walkthrough a job. I'm gonna give you a little bit of a back drop, right? Talk about, or show a little bit of the structure of ServiceTrade. I think it makes more sense once we get to the job at that point, walkthrough the job, show how information flows through the system from one step to the next, go through a quote, get that approved move, that to the scheduling board, right? Invoice, and send a service report to the customer that's typically, the initial walkthrough. And if we need to do a deeper dive, whether it's you and I one on one diving into dispatching or scheduling a bit more, then I'm happy to do that. But I think, this initial overview should give you a lot of what, you were just referencing.

--- Purchase decision ends ---

LISA

31:49 Okay. All right. Sounds good. Thank you.

DAN

31:52 Absolutely. And feel free to interrupt me. I'm a big coffee drinker and it's currently about six o'clock Eastern Time. So I'm on top four or five have kinda forgotten at this point, but I like to keep it like a conversation. So, feel free to jump in, ask questions as we come up.

LISA

32:09 Okay. Thank you.

DAN

32:11 Absolutely. So great. Well, I'm gonna jump into things here and... I wanna start with a little bit of background on service trade, who we are and I think why we're different than a lot of probably what you've looked at. And so, so service trade is designed specifically for the commercial mechanical and fire contractor. So we don't work with any residential provider and we never will. It's never going to be our market. We're gonna stick with commercial. We've been doing it over 10 years and I think a lot of what you're gonna see today, you'll feel like fits like a glove and that's because we, we've really listened to our customers as far as what they need and help they've really help influence and improve service trade over the years. And so currently we've got over 1,300 actually active customers. It's a little bit of an older slide and they service over 10 percent of the commercial industrial buildings in the United States in 2022 alone, seven point 5,000,000,000 dollars invoiced through our platform. So a lot of commercial contractors utilizing this successfully to the TUNE of seven point 5,000,000,000.

--- Implementation and ongoing support ---

DAN

33:21 So you are, you're in good hands here. As far as us understanding your business, you can know that when you call service trade, whether it's for support or during your implementation, you're going to be speaking with someone who's onboarded, likely many customers very similar to you all. And as far as the support thing, right? Customers that are similar to you all having similar issues and questions that, that's what we're here to talk about.

--- Implementation and ongoing support ends ---

STEVE

33:47 Right.

DAN

33:48 So, the biggest things for our customers and I hadn't asked about this yet. But is, the labor shortage right now, the skilled labor shortage that's really affecting the entire nation? Is that been impacting you all? Have you all seen it trouble to keep text or trouble to hire text?

STEVE

34:08 You know, the answer to that.

LISA

34:10 Yes. Well.

DAN

34:13 Out of 100, I hear somebody say no. So I just, I'm always just curious but, okay. So, yeah. So I think, you know, it's pretty clear that it's actually getting worse year over year right now. And our data shows that we have the decline, and folks going to get trained, and gain the skills that they need as well as folks retiring right there's an eight percent loss each year. So, the issue you're having right now finding text, it's only gonna get worse. So what we wanna help with and really where service trade attacks this is, we wanna make it first a joy to work for your company as far as the technician goes, right? But, and what I mean by that is they have everything that they need to be as successful as possible and they are your most strained resource.

--- Customer engagement ---

DAN

35:02 Without them. You can't get the job done. You can't generate revenue. So it doesn't matter how many sales you make, if you don't have technicians to get it done. So a lot of what we'll see here and talk about, you will notice is designed to make them as efficient and effective as possible and to keep them focused on the work that they're doing that only they can do, right? So instead of having to help with generating quotes, help track down parts, help with different administrative tasks, you wanna keep them working and focused on the equipment for your customers. So service trade, first and foremost, it's really two major categories, right? Control your costs and grow quality revenue.

--- Type of work ---

DAN

35:45 So, so how do we help you do that for us? It's about improving, your service and project operations to begin with. And, my clicker keeps going a little bit fast on me there. But... just put in service work and your retrofit your repairs all into the same platform industry, leading service agreement management, robust, parks management, labor management, accurate job costing, and invoicing... making sure that your team in the back office has everything they need to allocate resources properly and effectively.

--- Customer engagement ---

DAN

36:21 So for the technician, like we mentioned, right? Easy to use interface, keep them focused on the task at hand, allow them to collect all needed information and also see all the needed information that they need, whether it's service history, equipment, information, logging, videos, pictures... detailed asset history issue tracking.

--- Assets ---

DAN

36:42 So equipping the texts with all the information they need and allowing them to collect that easily for the back end.

LISA

36:49 Are they able to do like tests tasks like check off sheets or questionnaires for customers?

DAN

36:58 Absolutely. Thank you. Yes, thank you for the question.

--- Assets ends ---

DAN

37:06 And so selling more, right? And this one's gonna get two slides because I think what Adam and I talked about a little bit before the rest of you joined us was his team, the new sales team, right? Tracking those new customers, acquisitions, managing service proposals for maintenance agreements.

--- Recurring maintenance ---

DAN

37:24 And so service trade does have a service agreement module that does exactly that helps or helps field reps, survey sites, run equipment, record the equipment, right? Record labor, all the things needed for the proposal, manage that proposal, close that proposal, push it to service trade where you can execute the service and all the customer's information automated as far as services, that you, you're gonna deliver over the life span of the agreement, so on and so forth.

--- *Customer engagement* ---

DAN

37:56 And that's where service trade comes in and we are going to, you capitalize on all the pull-through revenue for those agreements, right? Help you quickly. This is what we call a deficiency report in service trade. So this is what a technician would produce when they signal a problem at a customer site.

--- *Deficiencies* ---

DAN

38:15 So on a maintenance call, they say we've got a compressor pictures are gonna come through previous deficiencies, and we'll look at this in more detail as we go through our demo. But all the information necessary for the office to quickly generate a quote, get it in front of the customer looks just like this with a one click approval process.

--- *Customer engagement* ---

STEVE

38:33 Making him... that's pretty cool. I like that.

LISA

38:38 Yeah, that's nice.

DAN

38:40 Okay. Well, I'm glad, that, that's appreciated by you all because this is definitely, what our customers stick around for anything specifically stand out.

LISA

38:52 I like the approval where it goes to the customer and then they can click to approve it.

--- *Quoting* ---

LISA

38:57 And then, so once they click it, I'm assuming that we get something back from them showing that it's approved. And then we move forward with, you know, getting it scheduled and so on.

DAN

39:09 That's right? Yeah. And you're going to get a lot more before they even click it, right? Service trade will give you red receipt. So a customer open the quote, you'll be able to see when they opened it and that they did open it. So you have security and assurance that they are receiving what you're sending them. And, for your inside sales guys, it could be, you know, I've got those set up on my phone where the e-mail comes in and says, hey, Dan just opened the quote.

--- *Quoting ends* ---

DAN

39:34 If they don't approve over the next hour, they're probably thinking about something could be an easy prompt for those inside sales managers to give them a call and say, hey send this out a few days ago. Just just curious if you had questions.

LISA

39:49 Yeah.

STEVE

39:50 I like the workflow that'll be great.

--- *Quoting* ---

LISA

39:53 Yeah, me too.

DAN

39:56 How does that?

STEVE

39:57 Compare to?

DAN

39:58 What you've seen so far as quoting goes.

STEVE

40:02 It's exceptional compared to what I've seen so far.

DAN

40:08 Would you go out on a lemon day? Just with this? We've only seen a little bit, I know, but would you say so far? This looks exceptional being better than what you've seen?

--- Customer engagement ---

KATIE

40:17 Far.

STEVE

40:18 Yes. Okay. Good. Awesome. Well, can you?

DAN

40:24 Excellent. Thank you, Steve. So profitable customer loyalty, you guys have, I'm sure, a large demand for your work. And so we want to help you not only identify your most profitable customers, but be able to service them and keep them forever, right? So, a customer portal right here, this is a quick glimpse at it, but they'll be able to see it's on demand, right? They can sign in 24 seven real time summaries of work with pictures, videos, invoices, deficiencies, outstanding quotes, service schedule of upcoming jobs. This is a quick example of a service report and I'll be sending one of these out to you today, but these are also accessible 24 seven.

--- Assets ---

DAN

41:07 It's a it's a link, that lives online, right? To be updated. So, services pictures, forms, checklists show them the value and the work that you're doing for them and allow them to see it all, on the back end, right? When they need a centralized location to see what their service provider and how their building is looking, they can go asset by asset and understand how their systems are operating.

--- Assets ends ---

LISA

41:32 That's good. So, that right there is what the customer can log into their account, and check on their account.

DAN

41:40 That's correct? Yep.

LISA

41:43 Okay.

KATIE

41:44 So, another...

LISA

41:45 Thing?

DAN

41:45 That, that service trade, does I think more so than and really the first out of a lot of field service software to approach it this way specifically in, the contract or industry, right?

--- Customer engagement ---

DAN

41:58 Is the approach sort of as Amazon is taken, make it really easy to communicate with the customer, really easy to engage with them online, to track your communications with them and for them to track their purchases really and their service, that you're providing for them. So we wanna put that front and center, put your brand out there way more often than just on the invoice or just when there is an issue coming up. And so communication and the ease of access to your company is big for us as far as our research development and overall how we structure the platform.

LISA

42:34 Okay, nice.

DAN

42:37 So service trade customers right now are our top hat performers. So I think that's the top 40 percent average 37 percent year over year growth in our mechanical for our mechanical customers.

--- Pricing ---

DAN

42:52 So 37 percent of 10,000,000. I mean, it's an easy number Adam gave me to do the math on. But three point 7,000,000 could be what you're all looking at not only the first year but every year after that. And obviously, that number grows as you grow... just out of curiosity. Do you think that's a possibility? Do you think that's even achievable with software you all?

--- Pricing ends ---

STEVE

43:19 Yes, I think it is achievable.

DAN

43:23 Excellent.

STEVE

43:23 Excellent. Because I just, I mean, just the idea of being able to do everything all in one place, the time is gonna save in the office. I can see where we can take on more. Unfortunately, you can't give me more technicians.

--- Customer engagement ---

DAN

43:41 I can help them get.

KATIE

43:42 More jobs.

DAN

43:42 Done though, I can guarantee you that.

DAN

43:48 Well, let's break open the application here. And I'm gonna show you how we can help those texts get more done and help those work orders increase, each work order. On average. I believe the number for us right now is service trade, customers increase the work order by 11 percent on average.

--- Customer engagement ends ---

DAN

44:07 So each job that you're doing is worth 11 percent more, same text doing. It takes the same amount of time you guys are delivering 11 percent more. So what I've opened this up on is, our customer top of corporate and they have six locations that we service for them.

--- ST app contracts and pricing ---

DAN

44:26 And this is the contract that we've sold for the customer. Now in service trade, we're looking at this contract and we're able to track our actual margin versus our expected margin, the invoice revenue to date. And obviously, I'm just kinda reading, but you can see you've got a lot of visibility over how this is performing, how this maintenance agreements performing this is where you'll determine rules for their markups, rules for how information goes to them. And this is going to give you visibility on again the contract performance and it's lifetime.

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

STEVE

44:58 Yeah, that's cool. We're everywhere.

DAN

45:05 Well, I'm glad, that is cool. As you said, Steve, I was working with a company similar that had had a lot of similar items to you. All they were using SSO and Sage 300, I believe, but this is really valuable for them. So it made me think, hey, I think I'll start here and do you all have this visibility today?

--- *Recurring maintenance* ---

STEVE

45:25 No.

LISA

45:26 No, no, no, no.

STEVE

45:29 I mean, I can dig it up, you know?

LISA

45:31 Yeah. You have to look in several places, gotcha.

STEVE

45:35 Where you have the calendar to create a report for?

LISA

45:38 Yeah. I do have, I have a question about it for the maintenance contract. Is there a place to put the hours it takes like for scheduling? Like if a maintenance is going to be at, you know, if we do like quarterly maintenances, and each maintenance is an hour long, then we have a place to put where, how many hours it is going to be scheduled, for one for dispatch. And then two, Steve does like to see the projected hours that we're up against for scheduling for making sure we have enough technicians to cover those hours. And, you know, things of that nature. Does that make sense?

DAN

46:20 It makes perfect sense? Yep.

LISA

46:21 That is.

DAN

46:22 Exactly how it would, is designed, right? And, our service agreement module, right? Those hours would be built into those agreements. And whether you were using that or not, you could still accomplish this in service trade. But basically those recurring services they would have, you know, estimated labor and we can just jump right into that. I was gonna show you the dashboard first, but we'll get to that a little bit later. It's it's...

LISA

46:47 Well, I don't wanna throw you off or anything I was.

DAN

46:49 No, it's okay, this.

LISA

46:50 Is this is?

DAN

46:51 Better stuff here. So this is one of our top of off locations and the services that you have for that customer are going to be set up here. Now, whether they're repairs or they're recurring services. Once you've set up the recurring services, for example, like a monthly filter change and my demo accounts a little bit messy. But hopefully this provides a little bit of insight. So you can have different templates, for those quarterly maintenance or annual, semi annual, as many different templates as you'd like to build out. Those templates are also going to include items prices, estimated time, you see two hours here. This one has an estimated price, which can also be as a sign. If you have preferred technicians for those templates, you can set that up as well. So once you've set that up for the custom customer, it's automated where you run a report, say I wanna look at my October maintenance falls under agreement and generate tickets for all of those reports. And we're going to go to that page next. But I do also want to point out on the location page, everything about this customer is gonna live here. So this is the customer, this is the hub. If you need anything for San Jose, top of, you know, that all their asset that's the customer equipment, all the asset information will be there, all of your previous jobs deficiencies, those are the repair opportunities and the status of those, your contacts. This is linked back to the Bill two. So anything you need about this customer on the one page here?

--- Dispatch ---

LISA

48:17 Nice... very nice.

DAN

48:22 So when I generate those, that maintenance report, Lisa, this is what we're gonna land with now. I'm able to generate hundreds of service tickets at once, right? Whether they're scheduled or not. This, this would be now unscheduled jobs that have a date that they need to be scheduled by to make sure that they're not overdue constant reminders throughout the platform to say, hey, this maintenance is coming up.

--- Quote templates ---

DAN

48:44 You need to get on the calendar. But as you can see the different services, so we've got three services for this job and pop up here a little bit, each one has their own checklist of what's needed. Each one has their own parts, labor and items. So let's say you have a boiler and hvac equipment.

--- *Recurring maintenance* ---

DAN

49:00 The boiler only is serviced annually, but you do quarterlies for the hvac. So when those pop up in the same time frame, we want to get them all done on one trip. So, and I'm just doing an example out there, it might be other types of equipment. But if you have different frequencies for equipment, so that's why, the labor right is allocated per service and those can be combined to the work order. Okay?

--- *Assets* ---

LISA

49:24 Okay.

DAN

49:25 Is that, did that answer your?

LISA

49:28 Yes. Okay. I see.

DAN

49:31 Excellent. Does that look satisfactory or anything left to be?

LISA

49:38 No, it looks good. I like where it shows each piece of equipment and what you need to do with it. The tech would be able to see that also, right?

DAN

49:47 100 percent absolutely.

LISA

49:48 Is there a limit of how many, like for instance, we have some large locations, you know, maybe they have 100 plus pieces of equipment. Is there a limit of how many pieces of equipment we can put on per location?

DAN

50:02 There is not, and when it comes to that, there's also different ways that you can simplify that. So, for example, you might have groups of equipment. So you'd be able to say the rooftop hvac units and group all of those. So they'd be individual assets, but they live under that group. So it can be a little bit easier to manage that way, but.

LISA

50:23 Yeah, definitely. I like that. Okay?

--- Forms ---

STEVE

50:28 The testing built in or are we adding?

LISA

50:32 Asking?

DAN

50:33 So there's not tasking necessarily what you're looking at, but we do have tasking and it is built in or you can do tasking through forms really depends on the workflow desired. But tasking is something, that is built into the platform. Yes.

--- Quote templates ---

LISA

50:51 Cool. Okay. And we would give you that information of what we want built in there for the task for each piece of equipment.

DAN

50:59 No, that's something that you would set up. We, we'd show you how to do it, and then you'd be able to do it, and change it and create as many as you'd like over and over again and they'd be saved in the system so that you could apply them as templates. So if you've got a similar service, right? You don't have to rewrite it again from.

LISA

51:19 Right. Okay. Nice.

STEVE

51:22 Right. So they'll have like check off, we could do. So, if we're creating the template, we could do the check off thing, with the template and have to check off everything they did when they were out there and create a form for the customer. So say, hey, everything was checked off. Here you go.

--- Tech On-site ---

DAN

51:39 That's correct. That is correct. And this is also where all the information from the tech as they're completing the tasks, recording attachments, videos, pictures, and comments and showing the customer what a good job they did. Everything's. Gonna come back to you all here at the office under this job.

--- Tech On-site ends ---

DAN

51:58 So, let's jump out to the field and take a look at our job ticket today. It looks like Katie rejoined us. Hey, Katie. Welcome back.

KATIE

52:10 Hey guys.

LISA

52:11 Hi, Katie.

KATIE

52:12 Hi, how's it going?

LISA

52:16 So far? So good.

DAN

52:19 Right. So I'm on our mobile app now and just want to double check.

--- Tech On-site ---

DAN

52:24 I am a clot sometimes when it comes to changing screen. So, can you all see, the mobile app on the orange bar at the bottom? Yeah.

LISA

52:31 Yes.

DAN

52:32 Excellent. So I just clocked in as in route. And this is really just for your internal use. As far as, hey, we know that Dan is now in route to the location that on time and on track where he's scheduled for the day, as far as notifying the customer that's also, like I mentioned, we want to put your brand and communicate with your customer way more than just the invoice, just when you're asking for money or just when you're reporting a problem.

--- Customer engagement ---

DAN

52:57 So this is one of those nice convenient ways to put your brand in front of the customer. So I will just go ahead and send you all a few notifications. We'll send Scott one as well. You might not know what's going on because I put your brand.

STEVE

53:10 In on this.

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

DAN

53:11 For the demo. But so the nice way to get your face in front of the customer, it'll obviously show pictures of the technicians who are on the way as well and when to expect you.

DAN

53:24 So the work order layout for the technician and let's see what let's go to the services because that's what we were just talking about.

--- *Forms* ---

DAN

53:32 So these are the different services that we're here to provide today. These are all quarterlies to take me around two hours on each one. I could check off service completed. I've got kind of a simplified packing here but this can get more granular as needed Steve?

LISA

53:51 Yeah, because we have a handful of customers that have their own questionnaire that they want answered and sent to them.

DAN

53:58 Okay. So you can either apply that here in the service or what you can do is use blank paperwork. So those specific customers, you could assign those... specific reports to the customer to where it's generated or the technician automatically. So there'd be rules where it's like, hey, when we're out at top golf, this form is automatically generated and... they would just fill that out and go through the checklist. This is an example of a refrigerant form for example. And you can see, the nice thing here is that it's pulled the equipment information in. It's. Also pulled the job number, the time the day, who's doing the work. And that's rules that you can set up to happen, you know, the pre fill autofill of redundant information that you already know, you can set it up to fill up as much as you want, or as little. So you have, the power there, the generated a form for each one of the assets today.

--- *Assets* ---

DAN

54:58 And the technician would simply go through, check off the boxes as they were required and save that to the work order.

LISA

55:07 Okay. Now, with that refrigerant tracking, is there, are we able to take that into a report to keep track of it for the track like the bottle number, and how much they use? Absolutely nice. Okay.

DAN

55:26 Absolutely. I know that, that's getting more and more regulated. So that is definitely something you'll be able, to report on per customer per technician, however you'd like to, and the different types of refrigerant as well?

LISA

55:40 Nice.

DAN

55:44 Okay. All right. So that's a little bit about the services we're completing and you noticed on the services we had the assets, right? That we were, each service was assigned to. Now we've got 17, I think different assets at this location. So when I look at assets from the mobile view, I have the access to all of the assets and, their history, their information that I need to on my appointment though. Hey, I know that I'm just working on these three hvac unit. Now, the technician is gonna have a ton of details here, so they can find whatever they need. You'll be if you're getting calls from text right now asking about information, for customer equipment, you won't be any more after the, they've been using service trade and the service history here is gonna be specific to the asset. So let's say you've got a like you mentioned Lisa, right? You've got a location with hundreds of assets. Imagine scrolling through every last job ticket to find when the last person to this specific asset was. I can imagine that would be quite a headache. So this pulls up only the job in service history related to this aspect. So we can see the last service call was just a few days ago. It looks like I can open this right up, see who was on the call. It was plant. Excellent. Looks like plant had one attachment. Any paperwork or forms or services that he provided... can take a look at what happened.

LISA

57:08 So, what if let's say a customer places a service call, but they don't know which piece of equipment it's for. How does it look to the technician at that point?

DAN

57:18 Great question. And so, the customer if they would request service through the portal for instance. And if they didn't know what asset it was, then they would select the default building asset. So it would just say location building. And then their notes based on the request might say, I mean, what might they say typically?

LISA

57:39 Just a unit in the back, the left corner of the roof. You know, something like that.

DAN

57:47 Perfect. Yep. So that those notes will be underneath that service request. And then the tech could assign it to an asset once they arrive.

LISA

57:56 So the tech can assign it absolutely nice. Okay.

DAN

58:02 And so I think I even have one like here we go first floor splits system, right? So maybe, you can assign the assets with a lot of different types of information. So if I do edit here, there's a ton of fields that you can fill out as far as giving details.

--- *Forms* ---

DAN

58:21 Not all of those are going to be required. We don't want the technician to get stuck filling out questions that don't need to be answered and aren't important for you, but you could get very detailed as far as describing the asset and how you want it to appear.

--- *Assets* ---

LISA

58:33 Okay. Thank you.

DAN

58:35 Absolutely. And one other key I wanna point out here on the asset level, so directly on the app that you can have attachments whether it's user manual or this could be a floor plan, right? Hey, this piece of equipment is exactly right here in the building access code notes, videos... and the deficiency section, which is again all of the reported repair needed repairs on this asset in its lifetime, you can see I have 117 overall.

--- *Deficiencies* ---

DAN

59:04 Some of those have been fixed and then open efficiencies which means the customer has not gotten back to us and we have not repaired them or attended to them. We got 38. So a lot of information to understand what I'm walking into on the equipment.

--- *Assets* ---

LISA

59:18 Okay. So.

STEVE

59:19 When you bring in a full build on blueprints, the hvac on mechanical drawings, absolutely here.

DAN

59:37 Something like that, Steve, that might not be as good as the ones you're working up, but.

STEVE

59:42 No, I'm talking about just the blueprint for showing all the equipment, where it's located.

--- Assets ends ---

STEVE

59:48 At the jobs. We do already have the plans, you know, for the guys to be able to open up and be able to see them, you know, if it's on there, they can see where all the equipment at according to the plan.

DAN

1:00:00 Exactly. And that way any time, whether it's an emergency call, all that information is going to be available to the tech, right?

--- Assets ---

DAN

1:00:07 No one has to attach it to the work order to set them up. It's just, it's automatically going to be there... and you can also have specific site comments, right? Whether it's a gate code or information that every time there's a job at this location, this is, some notes, some key notes, intelligence on the location on the customer for them to be aware of.

--- Access to information ---

DAN

1:00:33 So... sounds like so far the mobile app looks pretty good. What, what would your take on it be so far?

STEVE

1:00:42 You're more designed for the trade. You're already set up. It looks like compared to some of these others we've spoken to, they got to build everything... you're set up for this trade.

--- Access to information ends ---

DAN

1:00:57 Well, I appreciate you saying that we are definitely not under Construction. We, we've been doing it for 10 years, so always looking to improve, but yes, it is definitely built for your trade.

STEVE

1:01:12 Contractors, do you have out here in southern California?

DAN

1:01:18 I know that we've got 70 customers around 70 75 customers in California. I'd say hvac specifically, at least 25 plus of those would be primarily hvac, and then, you know, more that handle hvac as well as other mechanical type services.

STEVE

1:01:37 Is in southern Cal?

DAN

1:01:39 Just in California as a whole southern Cal, my geography is a little sketchy. So I'd have to get back to you, on a realistic specific number there but, or read I'm sure you've heard of them but they are.

STEVE

1:01:54 So customers can get.

KATIE

1:01:57 Yeah. I was just going to bring up, are they're one of our long time customers, which we can definitely get you some references as well that are in southern California specifically?

STEVE

1:02:07 That would be great.

DAN

1:02:12 Right. So when it comes to reporting repair opportunities, you mentioned Steve, you did a great job walking me through, what the texts are doing right now, as far as pulling into to the, one of, our two inside sales guys, right?

--- *Deficiencies* ---

DAN

1:02:28 Well, this is how that process is gonna change. They're they're no longer gonna call anyone what they're gonna do is add deficiency... compressor replacement. I'm gonna go ahead and label what my recommendation is gonna be. And the next prompt is going to be attachments. So I'll immediately get into documenting telling the story to the customer as well as it's going to help the office, right? Understand what we're recommending we'll do a video here as well. There's also an option to add an audio memo. So I could just talk through anything like specific parts or recommendations. I have the storms died down a little bit, but... so luckily, I'm still standing.

LISA

1:03:11 Is that what an, looks like?

DAN

1:03:16 As I say that I'm not sure I hear anything anymore, but yeah, you all are still there excellent. And so.

KATIE

1:03:24 Also gonna select, the level.

DAN

1:03:25 Of severity here after they've added attachments and they can add multiple of those many pictures, many videos, many audio notes. We're gonna stick with the two for demo purposes.

--- Customer engagement ---

DAN

1:03:34 But this is what stands out. And one of my customers mentioned it's service trade. You know, they had the process down right of how they were, you know, prioritizing pulled through revenue. But ServiceTrade allows them to not only capture the obvious repair but...

LISA

1:03:50 To easily.

DAN

1:03:51 Capture those lower dollar suggested repairs as well and just quickly combine them all on that next work order for the client and those dollars stack up, right?

--- Customer engagement ends ---

DAN

1:04:02 It's kind of economical probably for the sales guys to focus on a smaller repair recommendation when they've got something else around the corner. But when you make it super easy to do, you can have best of both worlds. So we'll tag our asset now and again, I'm gonna go back to you've.

--- Assets ---

DAN

1:04:19 Got hundreds of assets at the location. So all you need to do is either scan barcode scan or start typing in the serial number and it'll pop you to the exact asset and the status. So this is a new report. And if I need to add any additional notes on top of the attachments and other notes that I have, I might put a proposed solution here.

--- *Assets ends* ---

DAN

1:04:45 So that's it. I'm gonna get onto the next one, next piece of equipment. Next thing that I need to do to service the customer, make sure that their systems are up and running. And what I wanna do is jump back to the office for us, to carry that through the quote, and approval. How does that sound?

STEVE

1:05:06 Sounds good? Excellent.

DAN

1:05:10 And silly me here working on his screen share here we go. So you should see my e-mail now. Is that what everyone's seeing?

LISA

1:05:20 Yes.

DAN

1:05:21 Excellent. So I've set this up. Obviously, you'll get a notification in service trade as well, and we'll see that deficiency is now landed on the job ticket.

--- *Deficiencies* ---

DAN

1:05:29 But we are your sales managers, right? Really easy to set them up to receive notifications via e-mail right to their inbox. We can see a deficiency was reported. And keep in mind, Dan still clocked in on the job. Dan is still getting work done or maybe he's having a smoke break or talking to, the attractive lady at the front desk, right? But he's not having to call back in and he's getting work done. So, all the information needed to produce a quote here is in this report that Dan provided within 90 seconds. You're also gonna see any previous deficiencies related to this asset. So, hey, if this asset has been breaking down every six months, same issue every time with as big as you all are.

--- *Deficiencies ends* ---

DAN

1:06:14 I'm sure it's you probably remember sometimes, hey, I remember what happened last year, but really easy. It's front and center, right? Hey, mister customer. We're going to recommend a, quite a big adjustment to what we've been doing in the past to make sure you don't continue to have this issue.

--- Quote templates ---

DAN

1:06:29 Here are attachments, any additional comments from the technician, the job that it came from. So again, all the information necessary and all I'll do is generate a quote here. Now, if I need to make an adjustment here, I can, I'm not locked in to what Dan provided, but it should pre fill everything that I need as long as the technicians, are filling all those fields out for you. And at this point, I'm gonna apply a quote template. So very similar to what we talked about with a service template. Lisa, the same goes for, your common repairs that you might offer the compressor replacement here. Here's, the list of why we're recommending this, the work to be done, the labor that we expect the type of refrigerant, the parts that are going to be needed. And we'll apply that template. Now, you're not locked in here. You can make adjustments if this is a it's a, you know, it's a special compressor, right? So we might need to add a couple of widgets, and you'll see the pricing has automatically fall down our standard cost and our standard markup.

--- ST app contracts and pricing ---

DAN

1:07:33 And that is based off the contract rule for the customer. So whether you have a standard contract, that, you know, goes across all your customer accounts, that can be one case or you could have specific sets. Of pricing for different customers. Maybe you've got, you know, long time enterprise customers, that do a lot of business with you, and you signed them to a different type of pricing agreement. You'll see when I adjust the pricing here to a different contract, Texas children's hospital contract. The pricing will now change. So as we let me work to another one here and we've gone to one that looks like it's a zero contract. So we don't like that very much.

--- Quote templates ---

DAN

1:08:11 But the point being, your rules and your markups like you mentioned with that excel sheet that's built right into the program. So no more pulling around with excel. You're just going to upload those and adjust those and update them as needed. And that's gonna automatically perform, the markups for you.

--- Parts management (inventory) ---

STEVE

1:08:31 You working off the inventory?

DAN

1:08:35 Of, your items in price list that's correct?

STEVE

1:08:39 Okay. What if we don't have an items in price list?

DAN

1:08:45 Well, I'd be surprised if you didn't do you not have a...

STEVE

1:08:50 We, well, we, like I said, we use a price matrix off the excel sheet and that's where we get our markup from then there calling getting prices from the vendors. So we don't actually have an inventory.

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

ADAM

1:09:04 So, yeah. So we're still able to plug in pricing and all these spots.

DAN

1:09:08 That's correct. And even if it was, even if it was a brand new item, right? Then you could just create it right here right then and there and apply the cost that the vendor has told you and it's gonna apply the markup based on a rule that you've set, but you're not locked in to the markup.

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

DAN

1:09:28 So this is very flexible. But anything as far as that pricing matrix, whatever that's doing for you, that goes away having to use that excel sheet, right? It's just going to be built into the platform.

STEVE

1:09:40 Yeah, that's great. That looks great.

LISA

1:09:42 Yeah, I like that.

DAN

1:09:45 Excellent. All right.

--- *Quote templates* ---

DAN

1:09:49 So another minute detail here, presenting this to the customer. Now, you'd have based on your customers or based on all of your accounts, however you'd like to set it up, you'd set up default of how do we want to show this and present it to the customer? Some folks wanna show or some customers might require you to show all the line, items, prices, type details, others you might want to add a little bit of information from them, right? Where there's mystery there's margin. Somebody told me one time. So maybe you give them, the grand total only, but several options based on how you want to present it. So just keep that in mind. But, but that's it, if you don't need to make any more adjustments or comments, then you're gonna go ahead and send this out.

--- Quote templates ends ---

DAN

1:10:29 The attachments have followed us all the way along through the quote. Didn't even have to think about them. I have all of my contacts here. So, Steve, we've got you. Scott there. You are Lisa and Adam. And of course. So when you've got those commercial accounts, different buildings, different building managers, those are the location contact always linked back to a corporate account.

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

DAN

1:10:52 If you do need to communicate with someone at that level as well. So you can send it to quite a few people here, one to swoop, and we've got a cost quote out to the customer and I'll pull that up on screen here. Just like that quote in front of the customer with the one click approval process and the attachments down here at the bottom?

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

STEVE

1:11:20 Cool.

LISA

1:11:22 Nice. I like that. It looks really nice.

DAN

1:11:29 Excellent. What? Lisa, do you have a free hand or a free screen, to take a look at it, open it up on your end?

LISA

1:11:38 Yeah. I just opened it. Does what I opened it? Yeah.

DAN

1:11:43 It will, when I go back to that screen here.

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

DAN

1:11:53 Yeah. I thought you'd appreciate that. So looks like it hasn't shown me yet, but it will.

LISA

1:12:00 Well, I opened the e-mail now, it says view and respond. So I need to click on that part.

DAN

1:12:06 You, do you do?

LISA

1:12:07 Yeah. Okay. There, now, I'm opening it. Okay. Got it. Okay.

--- *Quoting* ---

DAN

1:12:14 Yeah. So we've got, you have viewed the quote now. I've also got your IP address. So I don't know if you guys deal with folks that legalities at all as far as, hey, you have to report something to a customer, otherwise you could, you know, be penalized or something, but that is a way to track them, make sure, hey, you did open it. And I could legally prove it. So really simple, to see how your customers engage with. It. Can also set those up to be notification straight to your inbox. Lisa prints has viewed the quote.

LISA

1:12:47 Nice.

DAN

1:12:49 And what that's gonna give you is a dashboard to report on, your quoting matrix. So were you, you're quoting metrics, excuse me. So a lot of status is a quote might fall into. And with manual follow up processes, you know, I could work 24 hours in a day, even 25 sometimes and I wouldn't be able to keep track of everything if I was using excel to be quite Frank. So we're using just my inbox, is a zoo. So this is just going to go ahead, and whichever category it's fallen in to submitted and not viewed. For example, these are quotes that have been sent to a customer and haven't even been viewed yet, run that report. I can filter more excessively like maybe inoperable. So the more low hanging fruit, I can select all of these and get them back in front of the customer. With one file swoop, send up to 500 at a time back out to the customer. You can also set that up to automate right where it's like, hey, if a customer doesn't open a quote, 48 hours after us sending it, we want to automatically send it out again at least one time. So follow up visibility. What are your thoughts on the dashboard and reporting here?

LISA

1:14:03 I like that. I like the auto sending reminders.

LISA

1:14:13 I, Steve you like it.

STEVE

1:14:15 You're waiting for my opinion. I like it. I like it a lot. I mean, you know, the visibility is going to be awesome for everybody... be able to see everything and see where we're at status. You run any kind of report you want there to see where we're at on customers, the fact that you can send it out multiple times at any time, as many as you want. I mean, the workflow is great. It's pretty awesome.

LISA

1:14:45 I like it.

DAN

1:14:46 Excellent. Well, Steve help.

--- *Quoting ends* ---

STEVE

1:14:48 I see how good it is.

DAN

1:14:52 Well, I was about to ask you a similar question which is, you know, I think we've been here in quite a bit of positive feedback which is great. And I'm not surprised actually learning about you all company. I think we're a great match for you, but help me quantify what this means in a revenue standpoint. And maybe Adam might want to weigh in as well. But how many more quotes do you feel like you get in front of a customer? How many more do you feel this would help you win?

ADAM

1:15:25 Yeah, I think, you know, for us, one of the big pushes with upgrading the system is increasing our margin and profitability more than anything else. I think of us being able to show clients like giving them a view into the system that we're using, is a useful sales tool. But to be honest, we haven't had an issue with obtaining new clients that. I think the big thing it's going to help us a lot with retention and increasing profits and margins. So client acquisition wise, I think we're doing great with that, but client retention could always be better. And then increasing our margins and profits can always be better. And I think this gives us a lot of good tools for that. So, yeah, I think it's you guys are checking a lot of the boxes that we're looking for right now... and then Dan, not to cut you short because I know like we're all kinda crunch the time. So like...

STEVE

1:16:21 I know one.

ADAM

1:16:22 Big thing that we always spend a lot of time going into is the dispatch part and I'm sorry, I had to jump off on a quick couple of calls there, but we haven't gotten into your dispatch system at all yet, right? Correct we...

DAN

1:16:35 Have not.

--- Purchase decision ---

LISA

1:16:37 Like...

ADAM

1:16:38 Five or 10 minutes to show us that because I know Lisa that, that's a huge part of this system upgrade is we wanna see how this, the dispatch system works on the sales part and everything. I think you guys are checking all the boxes on that end. So if we could kinda see a little bit of your dispatch system, how it looks and how it works. I think, you know, we have a pretty good idea of what you guys offer.

DAN

1:17:03 Excellent. Yeah. And happy to dive into that more. I definitely will give you a brief overview right now though, but like I said, if we need to set up a follow up typically, that, that's common, right? And Katie being close by to you all, I'm sure that I can convince her it probably wouldn't take too much convincing but to drop by and show you all a little bit more of, the application that, that's what we're here for. But hey, Lisa, if you don't mind if you still have the quote open, would you mind putting an approval on it for me? And then we can take this to the dispatch board and.

--- Quoting ---

LISA

1:17:35 Wow. I was gonna mention also too. I like that because sometimes, our customers will have questions and there's that button where it says request changes and they can type something in. I opened, that was nice to see that. So I hit approve. Perfect. Let's see enter by checking this read and approved quote. Okay. And it did a little approval on my end.

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

DAN

1:18:06 It did. Yep. So if you're sending that to multiple folks to it'll show the customer on their end. Hey, it looks like my teammate got to this before me and we're good to go. But we've got approval and Lisa, I like that you pointed out that they make changes, right? Again, making.

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

LISA

1:18:23 Easy for your.

DAN

1:18:24 Customer to ask questions and get what they need from you, right? I know how often I like to call people... about what my car needs done to it or about my AC unit out back. You know, it's not necessarily the most fun thing to the call and ask somebody and also are they even available, right?

--- *Quoting* ---

DAN

1:18:44 So make it really simple to request changes and for, the folks that need, to get back to them. But once this is approved, that's it and you can do this in bulk from some of your dashboards right? As far as hey, all of my approved quotes wanna go ahead and convert those to job tickets.

--- *Quoting ends* ---

DAN

1:19:00 Can also add to an existing job. So if we've got a scheduled project or maintenance going out on out there all week. Easy to pull those up. Just add it right to the ticket. They've got another task at or, the day tomorrow, but we'll create this from a new job. The po from Lisa has come over. We'll say the job due date. Let's get this done by the end of August, bring over all of our attachments and comment all the video, all the information that's been collected along the way. It's just gonna follow us here. So now our customer again similar to where we started with our work order, right?

--- *Dispatch* ---

DAN

1:19:34 We've got a customer job ticket with one service, a repair here. Now, I can quickly assign from here but I know that's not what you all wanna see as far as assigning the technician or scheduling the date. But let's pop out to the dispatch board... and there's a couple of ways to look at scheduling, right? So dispatch is one of them... and this is going to show you. I think kind of what you mentioned earlier as far as, hey, where, which technicians, where are they? What available work do we have? And this unassigned ticket, this is the job just from a minute ago. You can all, so add a brand new job. So if somebody calls in and is requesting service, but different categories that you all want to set up on your end as far as what you wanna see here and how you want to filter your dashboard, you wouldn't have to see all of this. So it'll be a lot less busy. I'd be pointed towards what you all needed, Steve. Okay. But here, we have our assigned unassigned job ticket up here. This is the quote that we just moved through the process and you'll see the job I'm on currently, we estimated it's gonna take. I think it looks like six hours that's why the bar is going that far? You can see Dan on site for that job. We're gonna dispatch this to him seven 30. He's gonna work late tonight, but as soon as I drag and drop that, we're good to go. If I need to assign multiple texts or I want to release or UN release an appointment, which means give the technician visibility or schedule it, but don't let them know it's scheduled yet. So that's always an option.

LISA

1:21:08 Good. You really need that.

DAN

1:21:11 Different, different things you can do here. And I'm gonna add them to this as well. So now we've got two techs that are going to be working on that repair. You can see Jordan's available if I needed to add him as well. But as I drag it as well, it's gonna move for both technicians. So.

--- Dispatch ends ---

LISA

1:21:30 Now, I see the, how you did that where it will move for both technicians. When you're trying to move it around, let's say it's set. But then we need one technician for maybe an hour just for I don't know lifting something. Can you put it on someone for just that hour or will it only match up to what you have everybody else at?

--- Dispatch ---

DAN

1:21:52 Yeah. I mean, so it does, so you'll see like I can put, I can schedule a job right over another job. So you're not going to be blocked. So, for that example, like let's say, hey, this six hour job, I did need to schedule Shelby, but she was only gonna be there an hour.

--- Dispatch ends ---

DAN

1:22:07 That's a great question. I'm not sure if you could get it to show up as only one hour on hers. I believe that the short answer is it would look the same here, but, you could specifically notify Shelby that her task there at that job, we're only gonna take an hour and all that could be documented so that, you know, it was a clear understanding. And as you looked at the details here, that could be notated as well. Chellbie is only there for an hour and a few other ways to point that out so that you could schedule over it as well.

LISA

1:22:38 Okay. But it is possible to put a signer to have her name on it. And okay.

--- Tech On-site ---

DAN

1:22:45 Absolutely.

DAN

1:22:52 So what I wanted to do is complete our job ticket and I know where we're coming up here. If you all, did, you all hang with me for about six or seven more minutes. I think that will give us time to wrap up.

LISA

1:23:03 Yeah.

DAN

1:23:04 Okay. So I wanna just quickly, I'm gonna punch out here in the field and actually I'll let you all follow along. So... I'm done with my service ticket, I might get a sign off from the customer. Is that something you all do get a signature from customers?

LISA

1:23:22 Yes.

DAN

1:23:23 Okay. So there are two options. You can get a pre work authorization or get a signature post work. Say this is what I completed, please sign off that I did indeed complete it. So, Steve, I'm gonna go ahead and forward your signature there. There we go. That's more like Steve, I think.

DAN

1:23:46 And I'm all set for the day and I might have been marking off my tasks and services as I went throughout the day. So they could have been already checked off. If not, I'll make sure that I have ticked all the boxes and I am done with this visit. So we've punched out. Now on the office side, we will see our work order updated.

DAN

1:24:16 Work order is going to be that's my repair job. Gotta go back to the maintenance job. Here we go. Work order is updated. The services have been marked, complete... attachments, added forms, signatures, pictures, deficiencies, recorded. And so I'm moving a little bit faster than I typically do just wanna make sure we make it through this for you all.

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

DAN

1:24:43 But we, we've got everything here documented and we're ready to invoice and create a service report for the customer. So we'll go through our invoice here and make sure everything lines up.

DAN

1:24:59 And I can create an invoice through service trade. So we'll go ahead and send this out similar to how we looked at it with the quote, right? And we've got Scott and Steve and Lisa here we are. And I'm also going to send you individually a service report. Let me pop over here. So that should be hitting your inbox any moment. And I'm gonna also send the service report.

--- *Quote templates* ---

DAN

1:25:32 And again, as far as presenting this to the customer, a lot of different formats, I think there's 12 options for how you want to present it as far as grouping, you know, whether you want to serve the total price for labor, charge, total cost reports, items, fees, or specifically line items for a piece of equipment, however you'd like to show them, you'll have that option?

--- *Customer engagement* ---

LISA

1:25:55 Okay. Nice.

DAN

1:26:00 And, the thing about the service trade invoice that our customers appreciate is that first of all, it's easy to get out quickly and accurately to the customer. But secondly the service report which I did send you separately so you can see what that looks like as well.

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

DAN

1:26:18 But the service details are right here. So I don't know if you all ever have billing disputes or customers, who don't wanna pay?

LISA

1:26:26 Yeah, just a few.

DAN

1:26:33 Well, we, we've got the documentation here for exactly what happened when it happened. Anything that they need to know on their end as far as work performed... this comes in a different format as well, which I believe is attached to everyone that's sent out.

--- *Forms* ---

DAN

1:26:54 And these will be your tasking and checklists right? With check boxes for you. And then the forms that we talked about.

LISA

1:27:03 Okay, nice.

DAN

1:27:07 Pictures, videos signature from Steve giving us the thumbs up.

--- Customer engagement ---

DAN

1:27:20 And that comes together for them. Obviously, you're getting it in the inbox just as your customers would the service report, the invoice service report tied to the invoice. But then it will all come together for the customer when they log into your portal to kinda the Cherry on top, right?

--- Recurring maintenance ---

DAN

1:27:40 So as the customer logs into the portal, whether they wanna look at a specific location, let's say our top golf in San Jose. Here are the services. Looks like we had two jobs today. Those are the ones we were just looking at our service maintenance job and our repair that we did the compressor template for.

--- Dispatch ---

DAN

1:28:01 We followed through the quote and dispatch together. You can see those on today's. Jobs, upcoming jobs in the future, recently completed jobs. So as they click in to these service reports here, it'll pull up those previous a service history... and they have full visibility also their invoices. Hey, do I need to pay?

--- Assets ---

DAN

1:28:24 Looks like we haven't paid yet. Take a look here. If they want to break it down, I wanna look at specific assets or specific deficiencies, quotes. Very easy to do that as well. And to finally request service, which is the big ticket. So we'll look at top golf specifically here are our assets... request service. And this kinda gets back to what you mentioned earlier. Lisa, what would they say if they don't know what piece of equipment it would be building that's a default one? Otherwise, they could label it.

--- Dispatch ---

DAN

1:29:16 And send in their requests and the date needed by that's going to help prioritize it on your end. If they put today, obviously, that will pop up right on the dashboard is essentially telling you it's overdue but you'll understand that it's just, it just came in.

LISA

1:29:31 Yeah. Okay.

--- Invoicing ---

LISA

1:29:37 No, I have a quick question. I was looking at the invoice and there's an option pay. Now, pay with credit card to pay with AC. H. When they pay with credit card, there's a three percent service charge the bank charges. Is that something that can be implemented at that time where they would know, like, how would that work?

DAN

1:29:59 I got you. So to charge the customer that.

LISA

1:30:02 Yes.

DAN

1:30:04 So, a couple of options that I recommend for that, which is, hey, if you're sending out an invoice link... with the credit card option, just include that percentage on there, right? So it can already be on there. If they don't pay with credit card, they can send you a check without that line item. If they pay by AC. H, I believe that you're able to type in a specific amount and they can just leave out that line item, okay?

STEVE

1:30:31 So...

LISA

1:30:31 We can just add the line items and say, okay, pay this amount for this, pay this amount for that. And so on.

DAN

1:30:38 That's right? And, you know, I know that can get to sound a little complex sometimes. So if that's not a preferred method, you can also set limits to credit cards. So just work that three percent into your invoice, you know, don't necessarily show it as a line item. And essentially, you're handling that, right? But hey, you wanna say we're not taking anything more than a 5,000 dollar payment on credit cards, everything else needs to be a CH or check, then you can set that restriction.

LISA

1:31:07 Okay. Nice.

LISA

1:31:15 Okay. Now, I have a question about the dispatch board.

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

LISA

1:31:19 If let's say the technician didn't finish the job, they need to return. Is there a way to market where it'll show they need to read? Like the dispatcher can see, hey, we need a follow up. We need to return to this one just by a view or do they have to open it and read notes and all of that?

--- Dispatch ---

DAN

1:31:36 That's right? So it'll the job will fall into a complete. So you can have multiple appointments on a job. So it sounds like the scenario you're talking about is maybe it wasn't planned to be, maybe they're on day three of a three day job and it looks like it's gonna take four.

--- Tech On-site ---

DAN

1:31:53 So what they would do is complete job and they wouldn't mark all the services complete, or they could say not done with this visit. So that would leave the job technically open and they can make notes about what needed to be finished. But if they leave a service open, any task open on the job, then a report that you all will have visibility on.

--- Dispatch ---

DAN

1:32:11 And it'll also give you reminders on the jobs that are completed. Is that still have open services. So all appointments complete but not the work wasn't completed. I don't know if I'm saying that, right? But.

LISA

1:32:24 Okay. Yeah, we're, the dispatcher maybe, yeah, maybe he ran out of time or, you know... yeah, I just, he thought they would be there two hours but it's gonna take another day or something like that. And that way the dispatch will know by looking at the dispatch board. Okay? I got to reschedule this for tomorrow. Does that make sense kind of showing it as a, yeah, like, you know, follow up or return, know something like, does it change a difference?

DAN

1:32:58 Yeah. So it does. And, and, you get more visibility on this than a couple of other views as well like jobs for the day that were incomplete but have no more appointments. That would be an easy report to pull up. But you'll see here the check mark and you see, the little up, you know, what to call it. A little increase there that's o'clock activity, right? So we have the darker blue that's not on site is the royal blue and every little mark up there is. So I clocked out, you can see it's marked complete. Now, if I hadn't marked all the services complete, but I clocked out, I'd be able to see as a dispatcher. Okay? Dan's, moved on. He's left, but this is not a complete job.

LISA

1:33:40 Gotcha. Okay. And then they would be able to go and view his notes and see what needs to be done why we need a return.

DAN

1:33:47 Exactly.

LISA

1:33:49 Okay. Now, is there a place for dispatch note like in house notes that only the technician can view, not the customer, things like that.

--- *Assets* ---

DAN

1:34:02 There are, yeah. So those are going to be location comments and comments can be left on assets and other things as well. But you can see here like tech comments, billing notes, scheduling note. So you might have notes for internal reasons, but technician might not need all of them. Scheduler might not need all of them vice.

--- *Assets ends* ---

LISA

1:34:19 Person.

DAN

1:34:20 So, for different staff members, and it looks like I don't have one that's assigned to everyone, but you can obviously set a here's one, right? So this looks like it's just viewed by everyone.

LISA

1:34:30 So you just add when you set it for the technician, like it's for the technician to read. Okay, here we go that's right?

DAN

1:34:38 So we check all three. And then if it's internal, only your company, if you want the customer to be able to see it, you can set it that way and that's when the lot appears.

LISA

1:34:47 Okay. Now, once you set notes, can anybody?

STEVE

1:34:51 Meet...

KATIE

1:34:51 Them?

LISA

1:34:52 Or is it set?

--- Tech time tracking ---

LISA

1:34:54 And is it timestamped who put the note? Like, can you tell who wrote the note? Maybe they forgot to put their initials or something it is?

DAN

1:35:03 Everything about the location is going to be timestamped here and the history dialogue. So anything that's added or changed will always be logged that's the same for the jobs that we have. So our maintenance job, right? So you guys are looking at the service report or Lisa is at least.

--- Tech time tracking ends ---

LISA

1:35:25 But...

DAN

1:35:25 But everything that Dan added and if Katie had done anything today should help me out a lot on the job. But if the other tech had helped me out, it would show them as well. Whoever changed anything modified deleted updated. Those are always going to be logged that's correct. And I believe that you can set restrictions on whether text can do things like delete notes or delete comments. So I believe that is a restriction you could set as well.

LISA

1:35:50 Okay. And maybe we, maybe the technician wrote it, you know, and maybe his notes weren't real, you know, pleasant or something.

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

LISA

1:36:01 I don't know, maybe he wrote something that we really don't want going to the customer. Is there a way to edit that before they get it?

DAN

1:36:09 Absolutely. And yeah. So that is like, so when we're sending this service report, you'd have your default setup on how you wanted, like what visibility, everything that toggled on is going to be visible to the customer.

--- Assets ---

DAN

1:36:24 But let's see here. Let's look at comment, for example. If these were like these are internal comment, what you do, probably most likely what the recommendation would be is set up your tech so that when they add any job comment, no matter what it is... there's an option for them to market visible to tech.

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

DAN

1:36:40 But typically, the default is for it not to be visible. But then you get over site again before that service report goes out, you're able to toggle off anything that you want to keep in house.

LISA

1:36:51 Okay.

--- Implementation and ongoing support ---

LISA

1:37:03 Okay.

DAN

1:37:08 So the, what I started to build out this during our call today and a little bit previous as well. And, and so, what I typically do for clients that I work with is great because I'm sure that you all will want to reflect on this together, discuss internally. And I know that you've got upcoming meetings as well when you get to the point of taking this to your leadership. But this is essentially a workspace and I've created different sections over here that talk about different aspects of service trade and they provide resources and information that is typically useful for folks to take a look at.

--- Purchase decision ---

DAN

1:37:47 This will also allow us to, I mean, you can drop comments in here for me, communicate with me this way and track, our Progress as far as our conversation goes. Would it make sense, for us to utilize this? Would this be helpful for you all or?

LISA

1:38:06 Yeah. So it's something you would send us and then we can go in there and look at here.

DAN

1:38:13 The idea is to help, you know, share information across your company internally?

LISA

1:38:18 Okay. So.

DAN

1:38:19 Whether it's you know, you and Steve wanna sit down or Adam wants to sit down with some of his sales guys, right? And take a look at some of the things that we talked about.

--- *Purchase decision ends* ---

DAN

1:38:27 It's going to be all right here for you and we can sort of centralize our communications and efforts as we continue the conversation. Assuming, do you all want to continue, the conversation that?

LISA

1:38:40 I think that would be definitely helpful. Helpful. Absolutely.

STEVE

1:38:44 Agreed. Okay. That's a good idea.

DAN

1:38:48 Okay. And specifically, well, go ahead.

--- *Dispatch* ---

LISA

1:38:53 I apologize. I know, I got on a little bit late again. I apologize. Are you able to, there was a question asked about your system being able to talk to Sage? Did we ask that?

STEVE

1:39:09 Steve?

DAN

1:39:09 Did yep, and they talk, they do talk?

LISA

1:39:13 Awesome.

STEVE

1:39:15 Is that import export or constant?

--- Accounting integrations ---

DAN

1:39:19 It is an integration for Sage, see?

STEVE

1:39:23 Is that something you guys do or do you have to help source it?

DAN

1:39:28 So, that is something that we have customers up and running with the integration live hvac contractors that are using a Sage 100 integration or Sage integration. I think we've got out of our 1,200 customers guess what all of them do accounting. And I think it's 78 different accounting systems or more than that. Probably, my sales manager actually told me the other day and, it was a very large number. So everybody's using a lot of different systems search. It has an open API. And so we've built a lot of different integrations over the year. And I believe this specifically for Sage, we do work with a partner for that integration. So we essentially contracted them to build it for us. And so that's who we work with on that.

LISA

1:40:16 Okay. Do you do?

DAN

1:40:18 It's already built?

ADAM

1:40:20 Sorry, Dan, you're saying, the open API call is already built. Is that what you're saying?

DAN

1:40:27 Absolutely. Yeah. And so, is, the integration is already built as well, and other contractors are using the integration and they are successfully using it, they've implemented it. It's running. So it's nothing that we would have to think about, or make up. We've got a successful integration that we can sell you today.

--- Invoicing ---

ADAM

1:40:47 Perfect.

LISA

1:40:50 Is your, I know we went over the invoices, what about statements? Are you able to run statements from service trade or do we have to use Sage for that?

DAN

1:41:03 Statements, profit and loss statements. So, what kinds of statements we're looking?

LISA

1:41:06 I'm sorry, customer statements, like monthly statements, if they're you know, like to, you know, send out to them. It shows them, you know, if they're behind? They're late, you know, we send out like monthly statements. Is that?

--- Quoting ---

DAN

1:41:23 Similar to, the quote dashboard, you can send out reminders on invoices that are overdue. You can add notifications to those as well. I think that the invoicing is a little bit different obviously than quoting. So I understand that. So there might be a little bit of a different workflow that is more pointed towards collecting if you will. So I can, yeah, I can find out a little bit more for you on that if you'd like, but they're definitely capabilities on saying, hey, I want to run a report on all overdue invoices and bulk send out reminders or anyone that's do within a week of their net 30 net 20, whatever you guys are running?

--- Tech time tracking ---

LISA

1:42:01 Okay. All right. Nice. Thank you.

DAN

1:42:04 Absolutely.

STEVE

1:42:05 So, do time sheets as well on the system Jerry?

DAN

1:42:12 That's correct. Cut down on, that two days or a day and a half that it takes?

LISA

1:42:18 That would be amazing.

STEVE

1:42:23 And your GPS technology, what do you have for GPS?

DAN

1:42:27 So...

LISA

1:42:27 Service?

--- Tech On-site ---

DAN

1:42:28 Trade the mobile app when the technicians are making, the clock activities. So it's either job prep in route or on site and that's gonna give a time stamp of where they are at that point in time. So, GPS coordinate of exactly where they are. So, hey, if they're clocking in as on site for their work and for a job site and looks like they're you know, down the street at a friend's house, then you'll know, but it's not going to follow them along like Uber or like the dominos delivery tracker, right?

--- Tech On-site ends ---

DAN

1:43:00 It's not gonna show them ticking along the road. And so, the app, the reason for that is, that causes a huge strain on the battery and drains the battery. So, we do partner with companies that offer fleet tracking, and they have, some great capabilities. So, if that's something you're interested in... absolutely.

--- Parts management (inventory) ---

STEVE

1:43:21 Well, we use one step, one step. Yeah... it's the program we use right now. So you're tracking cell phones is what you're doing, right?

DAN

1:43:34 Yeah. And is one step, is that something you install on per Van basis per truck basic?

STEVE

1:43:38 Yes, yes.

DAN

1:43:40 Okay. Sure. Gotcha.

STEVE

1:43:47 All right. Well, I think that'll do it for right now. It's...

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

LISA

1:43:54 You gonna send us a link for the screen?

DAN

1:43:57 I am, and a matter of fact, I'll do it right now. Let's see here. And if there might be a few adjustments based on our conversation, right? That, that I need to make. So this might change over the next couple of hours, but you all should just have received an invite.

--- Purchase decision ---

DAN

1:44:17 And in terms of next steps... I know that it sounds like a customer reference would be helpful for you as you all, are determining your decision here. So should I get working on that Steve?

STEVE

1:44:33 Yes, yes.

DAN

1:44:35 Okay. And I'm sure that you all want to have an internal discussion. Typically, I like to talk to folks follow up within about a week to, you know, answer some of that initial feedback talk questions and then there is pricing at some point by the way. Do you all have a budget?

STEVE

1:44:57 No, there's only. Okay.

DAN

1:45:00 Unlimited budget.

STEVE

1:45:07 We're gonna have to have an idea what your cost are gonna be, yeah.

LISA

1:45:12 And...

ADAM

1:45:13 Essentially, just to put you on a time line, like we need to put together a presentation for ownership by next month. So sometime within the next week or so, we wanna get your pricing, and get some things put together so that we have something to submit to start the conversation. We might want to implement as soon as at the end of the year. So like the winter months this year, so it could be something that gets rolling in the next couple of months. So.

STEVE

1:45:43 Okay.

ADAM

1:45:44 The owners motivated, to make the upgrade. I think we're at that point now with our business. So yeah, as far as budget concerns, this is why we've kinda, you know, interviewed six different companies at this point to try to nail down what our top picks are, and then to kinda take it to that next level so we can get the ball rolling in time for the implementation by the end.

DAN

1:46:07 So, okay. Well, we can definitely make that happen. And, to give you an idea kind of working backwards from that, the winter months probably are an ideal time for you to implement. Well, like many of our customers that, that's the same way that they're thinking. So this is kind of our busy season as well.

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

DAN

1:46:26 Flowing into the fall. A lot of folks are wanting to sign on and answer their final questions and get signed up, a. So that being said, we have basically availability spot. And as they fill up, they're on the first and fifteenth of each month. And as they fill up that pushes out the next available date to get started. I think right now it's September fifteenth. So it's typically four to six weeks. It can get a little bit longer as we get into our busy for thanksgiving. But that's typically what you're looking at. So let's say you signed up middle September or at the end of August here, you could expect the middle of October or November first even if that's better for you start date.

--- *Purchase decision* ---

DAN

1:47:04 And as far as us getting back together, and going over a proposal that I can prepare for you... who would need to be involved on the call. Would everyone that was here today like to be on the call for that conversation?

LISA

1:47:19 I...

ADAM

1:47:19 Think it really just needs to be Steve at that point. You agree, right? Steve, you're collecting all the pricing, and getting all that part together. Yeah.

--- Purchase decision ends ---

STEVE

1:47:28 Yes. One thing I was hoping maybe Dan can help you guys out messing that report for. And Jeff is the top five reasons why, you know, increase margins, reduce overhead, that kind of stuff. Maybe we can help you out with putting that together.

ADAM

1:47:50 Together like an internal report for ownership with some of the comparisons based on our own assessments.

--- Purchase decision ---

ADAM

1:47:56 So we might reach out to you for some additional, you know, literature and support and things just for that initial meeting before like you on board. I'm sure we'll have a next, you know, stage of this where you're meeting with the owner and CFO and all that kind of stuff.

--- Purchase decision ends ---

ADAM

1:48:12 But for the initial round, we need to maybe just ask we'll submit a request to you for some additional info so you can provide some for the meeting.

DAN

1:48:24 Got it. Well, that's what I'm here to do and that's also where this comes into play, right? I'm happy to tailor a PDF to report for you all. And I've got a couple of... metric reports based on service trade, customers data that I think would be valuable information for them, but happy, to write something up with you all and hopefully support you, with some of the information here. Top five reasons document, top five that's what we'll call it for now.

KATIE

1:48:56 Actually have one of our reports pulled up the boost revenue dashboard. I don't know if you want me, to share that with them or if you guys have a minute to look at it, but I think that might be something of interest.

DAN

1:49:12 Sure. Yeah, I think you're talking about like a metrics report.

KATIE

1:49:16 Yeah. So are you guys seeing my screen here? Yes, Adam, I know you were asking about this. So this is one of the reports that comes with service trade at our enterprise level. But basically what you're looking at right here is a breakdown of your customers. So I know you guys were talking about like tracking profitability.

--- Quoting ---

KATIE

1:49:37 So this is gonna break down where all of your revenue is coming from, whether it's service calls, repairs, emergency services. It's also going to show you things like your biggest open deals, so you can keep an eye on what your quote approval rate is. Obviously, if it's super high, maybe you should be sending out more quotes and then it's actually down here gonna show you, your revenue distribution by customer.

--- Quoting ends ---

KATIE

1:50:04 So, this kind of was ringing some bells that you were talking about, you know, figuring out who your best customers are. And, and if you guys have any customers that maybe you should fire or not to not put kind of as much emphasis on it's. Gonna show you your margin per customer and you can actually click into a customer and all of this data up here would update specific to that customer.

--- Quoting ---

KATIE

1:50:29 So you can see, the numbers here changed a little bit, but just wanted to quickly run through that as a.

ADAM

1:50:38 Yeah, that's perfect. Is this a PowerBI? Is that what this is operating?

KATIE

1:50:44 We use, quick site, yeah.

STEVE

1:50:48 Yeah.

ADAM

1:50:48 Look super familiar. So.

KATIE

1:50:50 Yeah, yeah.

ADAM

1:50:51 Looks good.

KATIE

1:50:52 There's there's a bunch of different point points that we can report on if there's like a specific report that you want added to this, but this is something that we, this is actually anonymized actual customer data. So this is exactly what it would, what it would look like.

--- Purchase decision ---

ADAM

1:51:09 Yeah, that's great.

KATIE

1:51:10 So, yeah, I know, you asked about it earlier, so I just wanted to make sure that we quickly touched on that and we can obviously dive into it a little bit deeper but wanted to give you at least a high level view of it.

ADAM

1:51:20 Perfect.

DAN

1:51:21 Thank you. Yeah, yeah, thanks, Katie. And, and Adam, I put in here to the workspace actually a page with some of that for you all as well, the reporting and metrics page. So you look into that a little bit more if you'd like to. And we can also walkthrough, you know, the live present, Katie is really good at that side of things, the data and such, so we can crunch some more stuff down but this is what I've got so far for next steps. Can you let me know if this seems about right? So basically we'll communicate from here as far as putting together a document, that you need to present Steve and I will get together on pricing possible follow up demo and the upcoming couple of weeks with the owner and CFO, probably a conversation between us before that. But, and also, I will be providing you all with a customer reference.

--- Invoicing ---

LISA

1:52:17 I do have a question. I'm sorry, I had actually two other quick questions. One with the invoicing, we have a couple of customers that they prefer there's mailed. So, is there like a friendly print type work order and invoice that can be printed up and mailed out?

DAN

1:52:37 Yeah, absolutely.

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

DAN

1:52:38 If you look at the service report that I sent you or any of the documents actually that I sent you, there will be a little button that I think it's a printer button is what it looks like on that live link. And honestly, the invoice might come with a PDF in the first place, but those can all be printed. And so that's the customer view of it. But, if you wanted to do it on your end internally, there would be a print button as well. So you are able to print those.

LISA

1:53:04 Nice. And then what, how does it work for? Maybe, you know, we choose you and go with, you know, how would it work for maybe future support?

--- Implementation and ongoing support ---

LISA

1:53:13 If we had questions, maybe, you know, after training, we came across something or do you have tutorials for us to do, you know, maybe look at real quick to help us through something? How does that work?

DAN

1:53:26 Absolutely. Great question. So the onboarding overview, let's take a look at it together. So, so for us, when you all signed up, I would give you, I hand you off to the project team and... what was that? Sorry?

STEVE

1:53:44 Sorry.

DAN

1:53:46 Okay. Audio goes in and out for me sometimes so I just wanted to make sure but you'd have a project manager assigned to your implementation. They would be your point of contact on our team to guide your understanding of service trade and keep you on task on track. They've got several people working behind them as well as far as to help you with data import, data migration. So, for example, data gathering here, customer services, items, prices, PDF, forms, customer equipment, to name a few learning service trade. We do have a certification program. If you feel like sitting down as a team, for example, having a tech day and then a office day of training. I think adding the remote session or even the onsite train training days could be very useful for a team. Your side. We understand that you've still got a business to run as well though, which is where the certification program should be able to get you up running quickly. And as far as, hey, once you're trained, once you're using you've, plugged in your integration, you've approved, and your ongoing support help center, e-mail support, phone support, and the in app chat.

--- Implementation and ongoing support ends ---

DAN

1:54:56 We've got a world class support team. I think they really enable our sales team to sell. Because hey, if we can't support you after making the sale, who's to say I'm ever going to be able to provide your reference, right? So ask them definitely. When I, when I set you up with the references, ask them about our support team.

--- Implementation and ongoing support ---

DAN

1:55:14 I think our average tickets response and solution time response time, I believe is under seven minutes. And this resolution on average, is under an hour that's the number they always bring up on our quarterly business reviews. So... take pride in our support. And we're always going to be there to assist you on that. You can also add additional support items like a TAM, for example, a technical account manager who you'd basically pay in an hourly rate to say, let's say we want four hours within each month to review different metrics in your account, talk about workflows and goals that you have that you're working on. So that could be someone that you specifically, you know, hiring essentially as your service trade expert to help point you in the right direction on different goals that you have. So a lot of options on support there.

LISA

1:56:09 Okay. Nice. Thank you. I appreciate that.

DAN

1:56:13 Yeah, absolutely. And you'll see that is also an article or a section of our workspace here.

--- Implementation and ongoing support ends ---

DAN

1:56:20 So definitely utilize, you know, this information. I also added in a customer story, which is quite a few of them that we have online, but I believe that a SSC migrated with Sage as well. So, reading up on there, you know, it's about a five or six minute read, but that could be useful to take a look at as well talking about implementing.

LISA

1:56:44 Okay.

DAN

1:56:47 And you said you had two questions? Was that both of them or?

LISA

1:56:50 Yeah, that was the two questions.

DAN

1:56:52 Okay. So, Steve, why don't, would it work for you and I, to think about some time maybe on Friday or Thursday to get together, and punch out some pricing, make sure we've got, some numbers in your hands.

STEVE

1:57:10 Let me see. Yeah, that would work Friday. What time works for you? I am?

DAN

1:57:20 You said nine am?

STEVE

1:57:22 Yeah.

DAN

1:57:23 That's noon for me. I can put down my lunch for you, Steve. I got it. Yeah, noon. That works. I am wide.

STEVE

1:57:31 We can do 10 if that works better for you?

DAN

1:57:35 No, I was just messing. I'm sorry. Yeah, noon is great. So, I will do, you wanna get on a call like this or is it better if I just reach out to you like directly?

STEVE

1:57:47 You just reach out to me directly? I?

DAN

1:57:50 Okay. And I think Henry's got your cell phone. Was that your cell, that he and you talked on?

STEVE

1:57:56 Yes.

DAN

1:57:57 Okay. Is that the best?

ADAM

1:57:58 Number to call you on?

STEVE

1:58:00 Yes.

DAN

1:58:02 Sounds good. So, I'll reach out to you at noon, my time, nine am your time on Friday and we get to the bottom of that... Lisa, Adam, do you want to set a time for us to, you know, plan on talking again as far as addressing any questions as they potentially come up.

LISA

1:58:24 Yeah, I'm hoping for another day, Adam. What about you?

ADAM

1:58:27 Yeah, yeah, I'm open. Maybe what do you think maybe this following week sometime or?

LISA

1:58:38 Yeah, I'm good. Whatever day I'll make it happen to?

ADAM

1:58:42 Dan, what's your schedule look like next week?

DAN

1:58:46 Next week, Monday is a no go for me. Tuesday afternoon is fine. Wednesday afternoon, Thursday, only the afternoon, Friday, I'm flexible morning or afternoon.

ADAM

1:59:00 Let's go Wednesday afternoon? Is that good? Lisa?

LISA

1:59:03 Yeah, I'm good that day.

ADAM

1:59:04 Okay. Wednesday afternoon to.

STEVE

1:59:07 You wanna say?

KATIE

1:59:07 One o'clock two o'clock...

ADAM

1:59:10 Yeah, one o'clock our time. Yeah, Pacific Time.

DAN

1:59:13 Perfect. And I'll put everyone that was on the call today for Scott, Lisa... Steve and Adam. I'll put you all on the invite there.

--- Purchase decision ---

DAN

1:59:26 Feel free to add additional folks if need be. But if Scott's free to jump in then maybe he's got some items since he wasn't here for the first one. And yeah, happy, to dig into a little bit more.

ADAM

1:59:37 Sounds good.

STEVE

1:59:38 Dan, like your sister and you check all the boxes, like I mentioned, this is so we could come up with some good pricing here.

DAN

1:59:47 That's what I'm here to do. Steve. So really glad to hear that this checked a lot of boxes and that, it was a useful session for everybody so excited, to learn more and to continue the conversation. Feel free to reach out to me or Katie. I'll send you over an e-mail here shortly, but you should have access to the workspace so you can also comment and ask for things there.

--- Purchase decision ends ---

STEVE

2:00:08 Right. I'll look for those references from me as well.

DAN

2:00:12 I'll start working on those right now, and be in touch with those as well shortly there, Steve.

STEVE

2:00:16 All right. Thank you.

KATIE

2:00:18 Very much.

LISA

2:00:18 You have a...

The End