ServiceTrade Review

Juanita Guzman with Anderson Mechanical Services and Vertical Mechanical Group
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Participants

ServiceTrade

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Account Manager

Andrew Rettig

Anderson Mechanical Services

Jonathan Moury
Service Operations Manager

Carlos Perez

Other

David Suciu

Mary Sanabria

Mary Sanabria

Topics

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Transcript

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--- Call Setup ---

JUANITA

0:00 Hi, Carlos. Can you hear me?

CARLOS

0:03 Hi, yes. Hi. How's it going?

JUANITA

0:06 Okay, wonderful. I'm great. How's your Friday going?

CARLOS

0:09 Good, good. So, yeah, so far? So good.

JUANITA

0:12 We, I'm sure.

CARLOS

0:14 Yeah, yeah.

JUANITA

0:17 Awesome. So, it looks like we're waiting on a couple of others. Unless everyone's perhaps within the same conference room.

CARLOS

0:24 No, I'm in a different office and then he should be joining soon.

JUANITA

0:29 Okay. Yeah, no sweat. We can give everyone else just a couple more minutes.

CARLOS

0:35 Great. Sounds good.

JONATHAN

1:54 Or?

JUANITA

3:08 See, I'll shoot Jonathan just a quick email there he is. He knew I was talking about them. So... me, let him in.

JONATHAN

3:25 Hello?

JUANITA

3:26 Hi, Jonathan. You must have known I was talking about you because I was telling Carlos, I'm gonna send him a quick email, you know, maybe he just got busy side track doing something. And there you were in the waiting room.

JONATHAN

3:39 I was responding to Braxton's email.

JUANITA

3:41 Yeah, I saw that. No, that, that's good because we definitely wanna make sure that gets taken care of. So, we've got Carlos and then we're still waiting on David and Mary perhaps. Is that correct?

JONATHAN

3:52 David is not gonna make it get pulled into an operation or into a job specific meeting. No worries. Carlos, do you know?

CARLOS

4:06 I'm not exactly sure I'm variable today, so.

JONATHAN

4:11 Gotcha. She's filling in for a CFO. Well, he's on vacation, so she's probably busy too. We, it's fine. We just the three of us, we can at least get started. And now we got a busy full agenda.

JUANITA

4:24 Yeah, we do. Okay. Awesome. No sweat if anything. You know, I can share the recording with any others that missed today's, meeting. But yeah, let's go ahead and get started. So on the agenda for today's, call, I've got introductions, Northboundary project management, and then cost tracking, slash data reporting, and then the issues. Of course, brakton is taking a look at now but my name is Juanita. I am your new account manager here at service trade. So very new to the Anderson mechanical services account. Not new to service trade. A little bit about myself. I've actually been with service trade for coming up on three years now and a little bit of context to, you know, like the account management switch that happened recently. You know, we service trade, we just had so much growth over the last year 2022. So we've increased headcount to our account management team just to better serve our customer base and have more face time with everyone. So everyone kind of shifted territories a little bit, but it's my understanding that you all were working with Dorothy previously. I don't know if you recall, because I think she mentioned also that you all have also gone through some changes as well. So, you know, I think we've got some new faces as well as myself. So it's going to kinda start fresh so to speak. So if you all don't mind just, you know, brief introductions kind of what you do, Anderson mechanical services, that would be awesome.

--- Call Setup ends ---

JONATHAN

5:55 Sure. I'll get started. So, Jonathan, Mary, I am the service operations manager. So I run the entire service department and I supervise the controls department. So... anybody who uses service trade on our end, kind of reports to me, I handle all the administrative tasks. And I have been in this position since September of the of last year. So still relatively new to it to my predecessor left with no notice. I kinda just stepped in. And then Carlos, what is your official title now?

CARLOS

6:39 I don't know, I think officially it's project accountant, but yeah, working in accounting. And I'm like Mary has been helping me. I'm like slowly learning to helping her with the service accounting side. So transitioning to learning that. And yeah, okay.

JUANITA

7:00 Awesome. So just to provide a little bit more context account management, what that means here at service trade. So essentially, I am your point of contact for, you know, anything account related, anything service trade related, you know, I'm your advocate. I'm your guide. I'm your mentor. Perhaps you all have questions about, you know, how to use certain features or have questions about specific workflows, best practices within service trade that's something you can absolutely come to me for. So yeah. Is there anybody else I would maybe be in contact with regularly? But for the most part, Jonathan, it sounds like it be yourself?

JONATHAN

7:48 Yeah, usually, I'm sorry.

JUANITA

7:51 No worries. Carlos, are you also new to Anderson? Mean?

CARLOS

7:58 Well, but I've been here for about a year in class February, but yeah, no, I've been all over like working multiple departments now, like I'm helping slowly learning with the service department because I usually use to help her with just the Construction. So now she's... okay.

JUANITA

8:22 Yeah. So it sounds like you've worn many hats in the past.

JONATHAN

8:27 So hopefully Carlos will be taking over all of the accounting for our service department. So he'll be our financial half. And then the only other person who you may talk to on a regular basis will be the person who Dave who is taking over our controls department and it's still up in the air on whether that would be run out of service trade or we'll be switching them over to our other platform which is pro core. Most of their jobs are large Construction which are already run out of pro core so that we may end up switching them. So. Okay. And then... I have people, the people who report to me are regular users as far as the office staff. You've been corresponding with Catherine. Good enough. A little bit. She's our inside sales. I think you had her email, not sure how you got to her?

JUANITA

9:25 Honestly? So me being so new to the account, I wasn't really sure where to start in talking with Dorothy who was a previous account manager. She had let me know that there had been a shift and, you know, staff. So what I did was actually go to your service sheet account and just pull up like who's in at the most? And Catherine is actually number one. So I felt that was good to just start with her and kinda see which direction she'd point me in.

JONATHAN

9:56 Gotcha. Yeah, she definitely uses it at the most. She kinda quotes all of our efficiencies and runs our preventative maintenances, but... she's not a decision maker. So if you do email her on something, she won't be able to have the authority or she may make a decision. I won't have any authority.

JUANITA

10:17 Gotcha. Okay. No, that, that's very good to know. All right. So, Northboundary... you wanted to learn a little bit more about that, Jonathan. So currently, we account managers are not yet authorized to really like demo Northboundary or touch it at this point in time. But at the very least I can definitely provide you with kind of like a high level overview as well as you had asked about the current integration between service trade and Northboundary. So I will share that with you as well as the projected integration that we're currently working on, which is a little bit more robust than what exists today, which that's anticipated to be completed, you know, sometime this year towards the second half... have you by chance attended any of those recurring webinars that we have every Tuesday or Thursday?

JONATHAN

11:13 No. I saw the email... the Northboundary notification email that went out earlier this week and I watched the video and my boss company president flagged, it is something of interest for us to look at. So I was just curious because in the video, you know, they focused entirely on Northboundary as a separate software service. And I'm just curious how it's gonna integrate... and when that would be offered as an integrated because... some history... I've done like pro core recently purchased a, an application called labor chart which they're working on integrating. And so I've been part of these, you know, our primary platform just purchased an offshoot in order to enhance their capabilities. And sometimes they go well. Sometimes they don't right?

So I'm just curious where you guys are at in that process and what it's gonna look. Is it going to be a standard edition or would be additional cost contract like those details?

JUANITA

12:24 Yeah, it would be an add on. Let me share my screen here. What's the easiest way to do this?

JUANITA

12:44 Let's go screen too.

JUANITA

12:50 Let's see. Are we seeing a flow map?

JONATHAN

12:53 Yes.

JUANITA

12:54 Okay, perfect. So let me make this bigger. All right. Okay. So this is the current integration between Northboundary and service trade. So, pretty standard things such as, you know, companies locations, you know, those new companies and locations that get created within Northboundary when creating these service contract proposals, those get pushed and fed into service trade and created as companies and locations as well as assets attachments and contacts. The projected integration later this year, it's gonna include a little bit more such as these things here. Okay? Which I can also share this with you via email. But really ultimately, I think you get the most value in attending one of those recurring demos every Tuesday at 11 a M eastern and then Thursdays are at 12 PM eastern. I can also send you those links via email.

JONATHAN

14:10 That'll be great. I don't know why I don't I haven't seen any emails for those. I don't know why I haven't...

JUANITA

14:20 I'm thinking that perhaps the point of contacts for Anderson mechanical haven't been updated in our CRM, which is what our marketing team uses to, you know, send out those email blasts on these sorts of things that are happening. So I'll definitely make sure that gets updated that you're in the no, you know, everything. New upcoming things of that nature.

JONATHAN

14:47 Okay. Sounds good.

JUANITA

14:48 Out of curiosity, what are you guys using today to kinda manage those? You know, pricing service contracts or projects?

JONATHAN

14:57 We are working directly at a service trade for 90 percent of it. We use smart sheets as a supplemental.

JUANITA

15:05 Gotcha. Yeah, most of the customers you know, that are coming onto Northboundary, you're usually doing it, you know, at a service trade or excel spreadsheets with like some really complex... you know, formulas and such.

JONATHAN

15:21 Yeah. Yeah. Smart sheets. Is it's pretty big file?

JUANITA

15:25 Yeah, I'm sure. Okay. So yeah, I definitely think you, you'll benefit from attending one of those demos which are actually conducted by the founder himself, Vince. So you'll be able to ask, you know, one on one questions and things like that. But yeah, that's definitely a great starting point for you all to learn a little bit more about that and I'll be sure to share those links with you all.

JONATHAN

15:54 Okay, perfect.

JUANITA

15:55 So, awesome. Project management. Let me take a quick peek in your account. So we are currently in the process of rolling out the two remaining features within our project management suite which are whip work in Progress as well as Progress billing. And I actually do have access to whip. I do not have access to project billing, but I can at the very least show you what that looks like today and those are currently available to you within your subscription at no additional cost. Okay? So I'll share my screen here and we can walkthrough... kind of the process of creating a jet. So first and foremost, typically you see service trade, correct? Yes. Awesome. All right. So I'm gonna start with a quote. Let's do... install this expires tomorrow. All right. Let's add a service in here. And I'm gonna use one of my service templates... that I've created for a project. Let's do a phase one. So using that template, you know, just provides me with all information which I can later, you know, manipulate as well if needed. But I'm gonna go ahead and say that let's go ahead and add another service phase two.

JUANITA

17:39 And look out of phase three as well.

JUANITA

17:52 All right. On this template, whoever created it, they have really bad margins. So we're just gonna disregard that. However, okay we've got our quote. I'm gonna go ahead and approve it, assuming, you know, I've sent it to a customer. I'm gonna manually approve it, create a job from quote. And this is where I can toggle on manage this job as a project due date? Let's say end of month... and create project from quotes.

JUANITA

18:30 Have you all taken a look at any of those like support articles that give you an overview of project management? Or are you just very, you know, fresh don't really know anything about the features that we've released so far?

JONATHAN

18:48 I glanced at something a couple of months ago, but I assume I know nothing.

JUANITA

18:53 Okay. Then my apologies, you should have cut me off much sooner and just, you know, to tell me to slow down. I'm also heavily cathonated today. So feel free to like to stop me and crime in and ask questions. Okay? All right. So with that said... you're very familiar with this view here. We've got our different phases, job items. So essentially our quote is our budget. So I'm gonna click this view budget so we can view it in a different tab and it will give us a lot more information, our estimated margin and so forth. Currently this budget as in draft mode. But once I lock the budget, it's locked and any changes that are to be made after the fact must be done via a change order. Okay? So you can have different types of change orders whether they're internal and you eat the cost, right? Perhaps you just underestimated something or perhaps it's gonna be customer facing. So I'm gonna go ahead and create a change order here. For example, let's say the crane, you know, we estimated eight hours, however it's actually gonna cost us 10. I can add a comment if needed. We've got this little check box here to determine whether it's you know, a change order to the customer or if it's internal, if it's internal, you know, I uncheck this box. But this one I do want to send to my customer for approval. So I'm gonna scroll down and hit save. And very similarly to how quotes are used in service trade is how this will appear for the customer. So for example, we can review change order over here on the left hand side include any attachments if necessary. But for now, I'm gonna go ahead and send it to myself. Somebody spell my name wrong on purpose. Just trying to be funny, perhaps one of my colleagues, but we're going to go ahead and send it. So we have this little icon here that lets me know, you know, I've submitted a change order and I can also view change order history. So this is the one I've just done.

JUANITA

21:42 So here's the customer facing document for the change order. I'm gonna go ahead and approve it.

JUANITA

22:08 Quick refresh. All right. There's my green checkmark letting me know the change order has been approved.

JUANITA

22:20 All right. I'm gonna go back to the budget. I'm sorry, back to the job itself. So now, you know, as technicians are out performing the work and actually using these job items... that's what will feed into my performance tab here. So you'll notice right now, we've got nothing going. However once I start entering used on dates that's what will feed into that data up top. So, for example, let's say phase one, yep, technician went out there. Yep, they used all these items on the seventeenth.

JUANITA

23:15 I'll do it for a couple of others as well. The technician name isn't required. Really. The main driver is the used on dates?

JONATHAN

23:26 Okay. So.

JUANITA

23:29 So, I'll say, yep, that was used and let's go ahead and hit save.

JUANITA

23:36 So let's rendering here. And we should see some action happening here shortly.

JONATHAN

23:44 If we need to split a phase, can you alter the line items within that phase to get a different type of calculation?

JUANITA

23:56 Yep. Yep. I just used a template, but yes, you can still manipulate any items after the fact.

JONATHAN

24:04 Okay. Because like you've got 24 hours on those lines and obviously, that's not going to happen in one day if you've only got one person out there. So.

--- *Pricing* ---

JUANITA

24:13 Correct. Cool. So we've got some action going now based on those items that I sourced with a date that's pulling into the total incurred cost so far. So we can see, you know, how we're projecting for example, you know, for this project, I estimated 230 hours so far. I used 32... and I'll scroll down a little bit further so you can see more information. And this is what's currently in beta. We've actually got several customers testing it now and it's expected to be released sometime next month. So very soon.

JONATHAN

24:54 Okay, awesome. So that's your working Progress report... nice.

JUANITA

25:02 Go down a little bit. Yup.

JUANITA

25:08 So if, you know, I can switch between service or item type dollars or quantities.

JUANITA

25:21 And the last feature is that Progress billing. So, for example, you know, I don't know perhaps you invoice 25 percent at a certain milestone, things like that, that's the last thing to be released, have access.

JONATHAN

25:40 Gotcha. Well, that's definitely something that we will need along with our projects because we're doing it currently, but manually calculated. So... yeah, awesome. Now, that looks great.

JUANITA

25:54 Super, you know, intuitive really user friendly because it's very similar to how services work in general. So, yeah, all pretty straightforward. Was there anything else you wanted me to hop back into?

JONATHAN

26:11 No, I just, I had no idea that this functionality has been rolled out live.

JUANITA

26:15 Okay.

JONATHAN

26:17 That's how behind we've kinda been. So we'll have to, we'll play around with it. We've got several projects that are ongoing right now, which we're doing through service trade, which can we convert an existing job into... we may play around with that. One of our biggest projects that's currently ongoing is we're... we've had to create multiple jobs in order to break up the phasing?

JUANITA

26:48 Goodness. Yeah. So the key indicator is this little PE that the job is a project, but for any existing job, you can also go into the job, go to manage job and then manage the job as a project... flip that switch on. Assuming the existing job perhaps, you know, came from a quote or, you know, what does that look like for you guys?

JONATHAN

27:20 Usually, we'll build it in as a quote. And then... once it's proved we'll convert it and then we've been doing brand new quotes for change orders.

JUANITA

27:34 Gosh. Yeah. Okay. Yeah. Well, this is, yeah, this will definitely absolutely make your lives a lot easier.

JONATHAN

27:42 Yeah. So I'll... have to learn about it, figure it out and then conduct the internal training so that we stop doing it the hard way.

JUANITA

27:52 Do you guys do any, like a, I think it's a I, a billing or are you do?

JONATHAN

28:00 Yes, yes, for you guys? Yeah.

JUANITA

28:05 No.

JONATHAN

28:08 I know right now what we're doing is for service projects that require Aia billing, we do the project out of service trade and then we have it duplicated in pro core so we can create the Aia bills.

JUANITA

28:27 Okay. How many are all projects? Aia billing? Or you mentioned just a certain percentage?

JONATHAN

28:36 Just a handful, maybe 12?

JUANITA

28:38 Okay. So, me just like 10 percent.

JONATHAN

28:44 Yeah, maybe 25 percent of our projects, but we are not running that very many of them.

JUANITA

28:52 Okay.

JONATHAN

28:54 Background on our company, Anderson mechanical services has two different arms. The new Construction which runs about 150,000,000 dollars with work works out of pro core. So they have 150 Ish employees. And then the service side, my division, we run about between eight and 10,000,000 dollars with the work, any our projects or anything under usually under 100,000 dollars or around there. So we do the small stuff retrofit and... small commercial buildings and things like that.

--- Pricing ends ---

JONATHAN

29:38 So only, I would say only about 25 percent of those projects require all.

JUANITA

29:46 Okay. Because service trades, project management suite. We don't have Aia billing capabilities. It's more. So, you know, billing directly to the customer. So it sounds like with 25 percent of it being Aia, you, you'd still get use out of these features here and just do the Aia via, you know, through pro core. Is that what I'm understanding?

JONATHAN

30:13 Yes. Yeah. Well, even for the Aia projects, this would help better keep track of cost and completion, all of that in order to fill out the forms under pro for. So... this is still a move in the right direction.

JUANITA

30:31 Gotcha. Okay. Wonderful. Good to know. I'm glad I asked that question because I would hate for you to get really excited and then later find out that, you know, does not work with Aia billing.

JONATHAN

30:44 No, we knew that was a limitation of the project management suite before it was rolled out. So we discussed that in November or December.

JUANITA

30:54 Okay.

--- Call Setup ---

JUANITA

31:07 Let's see a colleague of mine is actually gonna join our call as well because he is going to be speaking to the reporting capabilities there. He is. Okay. Perfect. That was perfect timing because he was actually running from a different meeting, invited him to this one. Hi, Andrew.

ANDREW

31:28 Hello. How are you all doing today?

JUANITA

31:30 Good. You were literally right on time, perfect timing.

ANDREW

31:35 Love to.

JUANITA

31:36 Yes, thank you so much for joining. So on next on our agenda talking with Jonathan and Carlos is reporting within service trade and Jonathan, you might not know this, but Anderson mechanical currently has what we call a technical account manager so that would be Andrew himself and Andrew, do you mind speaking to, you know, some of the things that we can work with re, quick site.

--- Call Setup ends ---

ANDREW

32:10 Yeah, sure.

JUANITA

32:11 Like reporting capabilities?

JONATHAN

32:13 Right. I know Dorothy was trying to connect us with Andrew before, but we were trying to close out the end of the year. So it never got never worked.

ANDREW

32:24 So, yeah, just on the reporting front, you guys already have a data warehouse setup as part of your enterprise subscription. So you basically have access to a siloed off version of all of your service trade data. I can share this article with you just so you have a kind a gist of all the information that's available to you. We have all these different tables that basically have all the relevant data. Like this is the job one. So this says basically every relevant data point off of jobs from service trade in. It can then take these data sets and either join them together, grab them on themselves. Like for example, we could join jobs to tags and just look at jobs specific tags for example, but we can join those together and throw those in Amazon quick site, a business intelligence platform. And then this is what we call the boost revenue. So this is kind of our off the shelf. This is what you get when you sign up dashboard. This is some of these are pretty self explanatory, but invoice revenue by job type. And then you have the ability to kinda slice and dice the data by any of those data points. So we can filter by specific date. So like when jobs were due, when jobs are created, you can pick what data point you want to filter off of and we can add in any sort of slicers you want up here, such as job type, customer location, things such as that.

JONATHAN

33:49 Yeah. Where this existed?

ANDREW

33:51 Yeah, it's pretty cool. And we can do like flashy visuals as I call them like this that are good for, at a glance. And then also just create dynamic tables. So let's say you wanna see your unquote deficiencies, for example, we can have a dynamic table that shows you deficiencies reported last week, that were unquoted in certain circumstances or something like that. And then that report can get sent out on a schedule to like an email for example.

JONATHAN

34:19 Okay. It's handy. Yeah, I mentioned to Anita my predecessor quick with no notice. So I did not get any onboarding into service trade. I've kinda learned it as I go.

ANDREW

34:30 Gotcha. Gotcha. Yeah, yeah, I hear. Yeah, it's tough to, you know, I eat the whole elephant I want. So I got you. But yeah, you got quote pipeline. These are all just kinda more generic suggested visuals that we give to everybody. Like I said, because we see that these have a direct impact on bottom line using service trade functions. I see deficiencies reported by reporter invoice revenue. I can pull up another example here of some stuff that we typically build for TAM customers that's just one that we give to basically all of our enterprise customers.

ANDREW

35:12 Any questions on that so far?

JONATHAN

35:15 I don't think so. Other than how do I access that data just?

ANDREW

35:22 Yeah. So we'll probably need to get you set up with a new quick site account. I can send you. We have a guide for getting that set up so I can send you that. And it's pretty straightforward, happy to hop on a call with you if you have any questions going through that process. But then after that, you basically just send me a confirmation that you went through the steps. And then I'll go on my end and connect the data warehouse to your quick site through a back end a.

JONATHAN

35:50 Okay.

JUANITA

35:51 And Andrew to confirm a new quick set account means 18 dollars per month, correct? For.

--- Pricing ---

ANDREW

36:00 I believe so, I think it's 18 dollars per month. And then I can show you the pricing here as well. I actually can't on one second.

JUANITA

36:08 So, I believe Kevin ended up perhaps cancelling your previous quick site subscription. So this is why we need a new one for Andrew to reconnect everything again. So you're only looking at 18 dollars per month, which annually is what 228, 224. I'm bad at math, Carlos, help me out. You're the math guy?

JONATHAN

36:30 When did Kevin cancel that?

ANDREW

36:33 See, I'm not sure exactly when, but I know that something happened because when I try and log into the existing credentials that I have, it says that this account doesn't exist, and I know that Amazon does that after I think between three and six months of nonpayment, they'll just go ahead and wipe your account. Gotcha. So I would say between three and six months at least.

--- *Pricing ends* ---

JONATHAN

36:54 Yeah. Well, Kevin left in September, so.

JUANITA

36:58 That, that would make sense.

JONATHAN

37:02 Okay. All right. That is what?

ANDREW

37:04 But yeah, he, I think the only thing that we had built out in your account besides that boost revenue and the off the shelf stuff was just kind of like a custom whip report that he had sent over. I can probably find that email and send that over to you. If that's something that would be useful to you. We could, I probably still have the notes and everything that I need to rebuild.

JONATHAN

37:24 Sure. I'd be curious what existed?

ANDREW

37:27 Okay. Yeah. It was just, it was like a... two part two part with visual.

JONATHAN

37:32 Sure.

JUANITA

37:33 Yeah. And to that note too, Jonathan, if you have any other like metrics KPI'S that your note you really wanna see, send it over to Andrew and he can, you know, pick that back up, Andrew, what are the recurring meetings that you typically have with your TAM customers? Is it weekly biweekly?

--- *Next Steps* ---

ANDREW

37:55 We typically meet once every two weeks for either half an hour or an hour depending on how much new stuff we have to discuss or updates that I have for you guys. So, would you guys wanna maybe set that up right now into the future?

JONATHAN

38:11 Sure. Okay.

ANDREW

38:13 What day of the week works best for you?

JONATHAN

38:17 Let me see. Carlos. Do you have a particular day or do you think you need to be?

CARLOS

38:29 Anything after Wednesday would probably be better best.

JONATHAN

38:32 Okay.

ANDREW

38:33 Next one. So, let me see.

JONATHAN

38:35 We do Thursday afternoons, maybe one 30 or two.

JUANITA

38:40 A...

ANDREW

38:40 Yeah, one 30 works for me. Okay? Eastern Time?

--- Next Steps ends ---

JUANITA

38:43 Correct. Yes.

ANDREW

38:45 Okay. Just making sure.

ANDREW

38:57 Grab this email. One second. Just send this out right now. So I don't forget.

ANDREW

39:28 Okay. You should get that in just a moment. Okay, great. Let's see here. Share my screen again.

ANDREW

39:40 Show you just some other, we're building these kinds of as just conglomerations of the most common requests we get from our customers, and then we're kinda just showing this to new newer existing TAM customers to show them what's possible. And then you can kinda just pick and choose what's relevant or what'd be useful to you. And then I'll jot that down, just add it to the deliverable list.

JONATHAN

40:03 Okay.

ANDREW

40:04 But some of these are pretty similar to the boost revenue. It's just, they all live in contextual spots like this one for service manager. We have an element for sales manager, year to date, revenue, month over month.

JONATHAN

40:17 Yeah, I think I need to play around with the stock features before I can conceptualize on what additional information we may want to see. So.

ANDREW

40:28 Okay. Sure. Yeah, we'll start with the boost revenue and just go from there.

JONATHAN

40:32 Yeah, I appreciate it.

ANDREW

40:33 Yep. Sounds good. Just on that. No outside of reporting, this is some of the other stuff that TAM can do for you. So best practice review. If you have any sort of question on ServiceTrade processes, we can sit there and get down in the nitty gritty and basically go through your workflow and suggest anything. If you have any sort of pain points or questions like that, bulk data management. If there's any sort of manual or tedious data point that you're going in and have to change all the time or have a question about that, we have access to a whole bunch of bulk tools as well as just the back end database too. So if there's anything that seems tedious or something like that, go ahead and shoot me a question and I can let you know if there's a better way to do it.

JONATHAN

41:15 Okay.

ANDREW

41:17 Service portal. Are you guys at all familiar with that?

JUANITA

41:22 Probably not.

JONATHAN

41:24 Probably not.

ANDREW

41:25 Show that off real quick here.

JUANITA

41:28 And this is every like everything Andrew is mentioning is what you have available to already Jonathan.

ANDREW

41:34 Just...

JUANITA

41:35 Catching you up on, you know, everything you have access to in service trade that can help you?

JONATHAN

41:41 Yeah. Yeah. I had one meeting with Dorothy before the end of the year last year and one meeting with a roaming sales guy came to the office in person, but other than that, we haven't been in much communication with anybody... else.

JUANITA

42:02 Well, that's gonna change because I'm very talkative and I wanna know what's going on.

ANDREW

42:07 Yup. Let's just pretend that this is your guy's website here. Pretend this is Anderson max website. We would put a module that looks just like this on your website. And then I obviously wouldn't have these credentials over here, but your customer would come in, request an account with the email address that they use in service trade that's the security layer there. They can only access what their email account is in service trade. We'll pretend to log in as if we're a customer. This is what they see when they first log in. They see today's, jobs for, and how this works is customer contacts can see all of their locations information, but location contacts can only see the location information that they're contact on if that makes sense.

JONATHAN

42:50 Think so.

ANDREW

42:51 But then they'd see all of today's, jobs. Let's say we're a customer contact. They'd see all of today's, jobs at all of that customers locations. For example, if their location contact, they just see it at those locations, they can click on the job and pull up the job summary, any attachments, any alerts, they can also print this service link. They can see recently completed jobs in the last 90 days. And if they want to see more than 90 days worth history, they just have to click on the specific location. It will give them the full history both for deficiencies, assets and jobs...

JONATHAN

43:25 Okay. So... interesting.

JUANITA

43:30 Have to, you know, have this on your website, but it's something that's already available to you that Andrew can help set up if that's something you would like to give your customers access to.

JONATHAN

43:43 Right. I like the idea of giving them additional transparency. The problem is that our contacts are a mess. So... because we've been operating haphazard Ly for the longest time. So... so my only concern would be some customers would have access to a lot more data that they probably entitled to because they're listed as a contact and things that they shouldn't be listed anymore. So, because the unique thing about our service department here is we have two main objectives. One is to service external customers like any service department does. But then another, the other half of our business is supporting our new Construction on. So a lot of our projects or a lot of things that we work on will change hands three or four or five times over the course of, you know, six months, you know, because a project will go from general from internal to general contractor warranty period to, you know, building management handling it. And then building management may allow an owner to step in. And if it's a multifamily, then you've got the, you know, if it's condo building, let's say, so you've got building management and then the condo building owner, and then the condo unit owners. It gets complicated pretty quickly.

ANDREW

45:15 I see that's something that is a project that you're taking on any time soon or when is worth taking on. We can, I can help you with that. We have the ability to just merge like duplicated contacts very easily as well as reassign and deactivate them. So that is something that you're looking to tackle. Just let me know and I'm happy to help. But this is what the admin or the, yeah, this is what the admin page of the portal looks like. So I don't know if you guys have a Wordpress website. If not, we would.

JUANITA

45:44 I just checked.

ANDREW

45:44 Perfect. So this is what is you still get individualized requests that you have to approve. So it wouldn't just be like we turn this.

JUANITA

45:52 On.

ANDREW

45:53 Everyone has access to everything. You could still vet each individual request that comes in and then also turn off their ability to view any of these three specific things on a per user basis. Okay?

ANDREW

46:09 So you don't necessarily need to do a full clean up beforehand. You could just vet it as they come in. Just let you know, gotcha.

JONATHAN

46:17 That, that's helpful actually thinking.

ANDREW

46:19 Yeah. Let's see here. We also host... zap automations that's basically like low code or no code automation. So essentially, we can use events inside or outside a service trade as triggers to perform actions inside of service trade or outside of service trade show a quick example here.

ANDREW

46:50 Here's, one we got for a new inoperable deficiency gets reported and that's just, it uses new deficiency in search straits to trigger. And then it filters off of only inoperable deficiencies. And then what it does is it runs code to grab the primary contact off of that location, and then it immediately sends them an email from their email address even with the body today, while conducting an inspection in our services to your location. We can auto fill this email with information from the job. So we auto fill the actual job information on there, our technician auto, fill the technicians name, it's hopefully they maybe met them or new that they were there at least reported in operable deficiency. And this just gives them a notification that they're going to get a call pretty soon. And this is just one example of a notification that we can use or that we can create off of actions in server.

JONATHAN

47:38 Gotcha. Now, I do know that Kevin was using zap beer, but never got access to his account. So I don't know what he had established, okay?

ANDREW

47:48 I don't think we're hosting any, your apps. So that is good at the very late. I think, yeah, we're not hosting them. So anyone that you have would be on your end.

JONATHAN

47:58 Okay. Well, they're pro, I kinda hope they're broken at this point, cause I have no idea what's the.

ANDREW

48:04 Yeah. Yeah. So you have no access to your ap here whatsoever?

JONATHAN

48:12 I'm telling you this guy quick, no notice. We've not heard from him since the day he walked out the door.

ANDREW

48:17 Gotcha. Yeah, you'll probably unfortunately have to prove ownership of that account or something like that to zap here. If there is even worth keeping in there.

JONATHAN

48:30 Cool.

ANDREW

48:36 Let's see here. Yeah, I just showed you an example of a notification... and you guys are not eight tiers. So, yeah, any questions I guess on any of the TAM offerings or reporting or anything like that? So far? I know it's a ton of information. So...

JONATHAN

48:54 I don't think so. Yeah, it's a lot.

--- *Wrap-up* ---

ANDREW

48:58 Let you see on it a bit. Okay?

JUANITA

49:03 And also to Jonathan, I'll send an email to, you know, recap everything we've discussed. Yeah, ton of information, but, you know, you seem like you're handling it very well.

JONATHAN

49:19 Well, just because the information is there, I don't mean I have to do anything with it, right this instance.

JUANITA

49:23 Right. So, just a recap on action items for myself. So I will send you the links to our recurring Northboundary demos every Tuesdays and Thursdays. I will send you... a recap of project management, the features that we reviewed today. I will send you a recap of TAM, what you already have available to you today with Andrew has sent the calendar invite. So, is there anything else that I missed by chance? You?

--- Wrap-up ends ---

JONATHAN

50:06 Not on my agenda. You wanted to discuss our account status and number of users?

JUANITA

50:12 Yes, thank you very much. So we do quarterly audits and it's really our accounting team, that kind of flags those. So let's see we currently see.

JUANITA

50:42 Had initially asked Catherine and she was like, nope, I don't have authority to do this here's. The.

--- Pricing ---

JUANITA

50:59 Okay. So we're showing 40 active technician users. It may just be that you have to do maybe a little bit of clean up. I'm not quite sure. But if you could look into that and just let me know that'd be very appreciated.

JONATHAN

51:17 How money are we currently paying for?

JUANITA

51:30 You are currently paying for?

CARLOS

51:35 I'm just saying.

JUANITA

51:38 32 technicians and one helper.

JONATHAN

51:48 Okay. So I can differentiate between technicians and helpers. And there's a price cost difference on the.

JUANITA

51:55 There is helpers are a flat rate... of... seven eight per year. So 708 dollars. Okay? And helpers only have the ability to view their appointments within the mobile app. They can clock in and clock out and upload attachments. So just those three actions. So for example, they cannot do things like create efficiencies, add job items... upload paperwork.

JONATHAN

52:41 So log in and log out attachments and notes, you said?

JUANITA

52:45 Clock in, clock out.

JONATHAN

52:47 Okay.

JONATHAN

52:55 Okay. That's why we don't have very many helpers, because we, we've been liking to have everybody have access to do everything associated. So that way the helper can fill out the deficiency. Well, the tech themselves is talking to the customer, so on and so forth. Okay. We'll have to look at.

JUANITA

53:14 Okay. Yeah. And typically, the reason we rolled out helpers is, you know, perhaps somebody in training, they're not quite yet certified to do all of the actions that technicians can. So that's kind of a way in which most of our customers can just, you know, pay less and not give them access to everything. But I understand in some scenarios, you know, and may, you may want them to have access to everything if it doesn't require like certifications or anything like that.

JONATHAN

53:43 Right, right. Okay. Yeah, we'll take a look at it as we, as I mentioned, we're probably gonna roll our controls guys over to pro core since they're on new Construction jobs, 90 99 percent of the time, which will pull seven folks out. And then we could probably bump our drivers down to help or status since all they do is clock in, clock out. So we'll do a full review on that and get back to you. So, are there any major pricing changes coming up? Our account renews in April, right?

JUANITA

54:16 Yep. It is coming up in may first, actually.

JONATHAN

54:22 Okay.

JONATHAN

54:28 Are there any manager pricing changes coming?

JUANITA

54:31 Let's see you are currently paying?

JONATHAN

54:39 This is Carlos.

JUANITA

54:41 Yeah. So we had a price increase in October of 2022 however, any customers that were on a rate lower prior to the increase, we're only increasing you by seven percent year over year until you hit the capped rate of the new price. So I can actually go ahead and send you a renewal notice so you can see what to expect on may one. Okay? Which is only a seven percent increase from what you paid last year.

JONATHAN

55:21 Okay. Okay. So... we'll have to compare it against our full disclosure. We've been researching and have several quotes in hand from competitors namely BuildOps. So, which is why I really haven't bothered running service trade. We were planning on replacing the software. We're now we're on the fence. So we'll compare it against what we've been quoted from others. So.

JUANITA

55:54 Okay. Yup. I'm familiar with boldops. Yeah. But I mean, if there's anything else that, you know, we can do to help bring you over this side of the fence, just let me know. I'm sure leadership would be happy to approve something. You know, I definitely do not have the authority, but right if they hear boldops, it's highly likely full transparency. You know, there's always something we can do.

JONATHAN

56:21 Yeah. Well, I'm curious to compare numbers since I don't know where you guys are at numbers wise. I know what we've paid historically. So for me... seven percent.

JONATHAN

56:39 Okay. So, okay. I'll take a look at what you sent over and we'll talk more definitely don't make any decisions before we talk again.

JUANITA

56:47 Sounds good. What I will send you is based on everything that was on the renewal last year, you mentioned doing a little bit of clean up, you know, removing your controls guys, which will be about seven, maybe switching some over to helpers, which would change the number significantly in your favor. So whatever I send you is just what spent on the account, not taking into consideration some of those changes that you mentioned, you might have to make.

JONATHAN

57:12 Great. Yeah, if the invoice you send over is itemized enough that I can calculate an individual rate play with it. I can provide final cost projections to executive management so that'll be great.

--- *Pricing ends* ---

JUANITA

57:25 Okay. Yep. I can do that. I'll get working on that right away. So awesome. Yeah, we're right on time. Anything else?

JONATHAN

57:34 No, got a lot to digest, but thank you for taking the time to talk to me. I appreciate.

JUANITA

57:39 Likewise. Thank you both so much. You know, have a great weekend and we'll be in touch soon.

JONATHAN

57:45 Okay, great. Thank you.

JUANITA

57:46 Thank you. Bye bye.

ANDREW

57:47 Thank you.

The End