



Control Systems 21 & ServiceTrade Consultation

Chris Kidwell with Control Systems 21
Recorded on 12/19/23 via Zoom, 1 hour 0 min.

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CONTROL SYSTEMS 21

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Transcript

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

CHRIS

0:00 Hey, Mike.

MIKE

0:00 Can you hear me? Yep. Hey, Chris?

CHRIS

0:02 I'm doing good. How are you?

MIKE

0:04 All right.

CHRIS

0:07 Good deal. Is it just you today? Anybody else coming along?

MIKE

0:10 Just me to start.

CHRIS

0:12 Awesome. Hey, I, first of all, I want to thank you. Appreciate you taking the time to kinda write that punch sheet out.

--- Purchase decision ---

CHRIS

0:19 Helps me a lot in terms of showing you things that actually pertain to what you guys are trying to look for.

MIKE

0:24 Yeah, absolutely.

CHRIS

0:26 Let me share my screen and we'll kinda get started since... we're not waiting for everybody else and we'll try to not waste anybody's time. Sounds good?

CHRIS

0:43 So, I do have a couple of questions. Can you kind of describe specifically some of, your business model, your workflows? What it is you guys actually work on? I got some of the notes from the other Chris that booked this call, but one fully understanding what it is that you guys do.

MIKE

1:00 Sure. Yeah. So you could think of us... kind of heavier on the industrial side... but it's yeah, we've been lots in looking at it based on the residential commercial and it's just kind of putting an industrial twist on it. So we understand there's probably not a software completely suited for the industrial side. So we're open to that idea. But yeah, we do a lot with, you know, like pump station motors... you know, electrical install. So you're running wire running, conduit, okay, servicing or, you know, tuning and calibrating equipment, like flow meters, okay, pressure meters or centers, things like that?

CHRIS

2:00 And are these, are these in like building complexes, water towers?

MIKE

2:05 A lot of municipalities? So, do you know, water wastewater plants, okay? Landfills, okay. Trying to think some other ones. Okay. Yeah, this is a big one. So.

CHRIS

2:24 Okay, perfect. That makes sense. Okay? And doing a lot of like inspections on those things. And do you guys do a lot of preventative maintenance, on those pieces of equipment?

MIKE

2:40 So, we've got, yeah, at least some preventative maintenance, let's, I was telling the other Chris as part of what we're looking to get out of a software too, is to kind of see what opportunities we have for maybe more of that.

CHRIS

2:53 Okay.

MIKE

2:54 A lot of the stuff we do now, it's what we call calibration. So we'll give it a customer where they have a requirement to get their equipment like I said, tuned up at some period at times that's the extent of most of our preventative maintenance. But I think there's probably opportunity to get in with some of these other things. Special.

MIKE

3:15 We have some repeat customers or repeat issues at the same customer of hey haven't. We just come check that out every so often so you don't have to call us when it goes down instead.

CHRIS

3:26 Okay. And then the calibration side of the pieces of equipment, is that standardized with government regulations or is that just making sure, the equipment is in TUNE per manufacturer spec?

--- Assets ends ---

MIKE

3:43 It's more per manufacturer spec?

CHRIS

3:45 Okay. And is there a rhythm to that workflow? Meaning we do that on a monthly basis, we do that on a quarterly basis or is that a, they pick up the phone call us and we show up and make sure everything's in spec?

MIKE

4:01 That one's usually got a rhythm to it. So depending on what the equipment is and how strict the control need to be from the customer standpoint, it could be, you know, 30 day, 90 day or some just annual.

CHRIS

4:17 Okay. And you guys managing that in a spreadsheet now?

MIKE

4:21 More or less? Yep. Okay.

CHRIS

4:29 Yeah. All right. Well, let me get into to the kind of dog and pony show, and I'll let you help drive this with some questions on what you wanna see... gonna have to, and when we get to this specific point, I'll show you what I'm talking about.

--- Assets ---

CHRIS

4:43 But, but I did not put a right piece of equipment for today's, example, but we'll use a chiller or something, but you'll be able.

MIKE

4:48 Yeah.

CHRIS

4:49 Looks like.

MIKE

4:50 That's perfectly fine.

CHRIS

4:52 But, you can see I just picked the wrong location to screw around today on... but we'll go through that and we'll see.

--- Access to information ---

CHRIS

5:00 So I plan on going through service trade. We'll kinda go through the core office side of it real quickly. We'll schedule out a call. I'll show you how we can schedule out a call, go through the technician workflow, so you can see what the technicians will do out in the field, how they will enter their time based off of, the different labors.

--- Deficiencies ---

CHRIS

5:20 We will do what we can your deficiency. So we, you know, whether you're quoting out TAM jobs or if it's a repair opportunity, we'll go through a deficiency loop. It's the same for TAM job. And I'll show you what that looks like. And then we'll get to an invoice status too, right?

--- Deficiencies ends ---

CHRIS

5:36 So we'll close out that work order and go all the way through to an invoice and kinda show you where we start to pull our hands out of the equation. That should cover everything on your punch list. Anything else specifically there you wanna talk about?

MIKE

5:52 I don't think so. No, I mean, I think a workflow can cover a lot of those things. And if some of this specific. So just like, hey, you know, we can cover this with a configuration or a setting. I can't you know, show you the way my system is set up today. That's understandable too. Just based on what I've heard from some of these others. I looked at.

--- Type of work ---

CHRIS

6:10 Yeah. So I will tell, you know, we are focused and I'll kind of start my dog and pony show. We are focused in strictly in the commercial industrial space. So we don't do any residential work. We don't do any test management, turf management companies. They don't use our platform.

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

CHRIS

6:30 Our, our bread and butter is in the fire life safety business. So the folks that are, you know, making sure, the fire pump is up to code, making sure that, the building is up to code and whether that be a weekly monthly quarterly inspection as well as the, we do very well in the commercial hvac side.

--- *Type of work* ---

CHRIS

6:47 So the guys that are doing a lot of preventative maintenance work, finding those repair opportunities and then obviously the TAM stuff. So it's strictly on the commercial and industrial space. We've got over 1,300 people using our platform in North America. We've been doing this for about 10 years. So some of the things that we are going to help you do is control your costs, right? So improve your service and project operations. Obviously, we're going to give the technicians the tool out in the field to do everything that it is that they need to do. And then to your point, we are going to help you guys grow more of your preventative maintenance side of the business, selling more service agreements of which we think kind of cascades down into winning more projects. So selling more service agreements is going to ultimately lead to more of that repair opportunity for you guys. So here's what we kinda call our profit wheel. This is everything that service trade is gonna handle. So we're going to handle all of your office coordination, right? So tracking all of your service agreements, work orders, projects, all of your time, the office is going to handle, right?

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

CHRIS

7:58 All of the scheduling and dispatching, obviously tracking all of that based off of their due date. However you guys are going to set that up in the system, phone everything up on a map and drop scheduling text around. And we'll go through this workflow too. So you can kinda see it live.

--- *Customer engagement* ---

CHRIS

8:15 But this is what the technicians are going to see out in the field with everything that they're supposed to do, repair this, check, this, do that. They'll take all their pictures, videos, audio, everything for the office as well as the customer. We have what we call a customer portal if you will, where your customers then would go to your guys website. We'd have to build a Wordpress website for you guys or have a Wordpress plugin, but they would go there. They would log in and they'd be able to see everything that they manage. So everything that you guys are touching, whether

it's a service call, preventative maintenance, etcetera on a specific location. Your customers then would be able to log in and see past jobs, upcoming jobs, all my service links, inspection reports, preventative maintenance reports, tasking sheets, whatever that is.

MIKE

9:07 Okay.

CHRIS

9:10 We're also going to help you guys with, your projects, right? So being able to quote out a project out of service trade, right?

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

CHRIS

9:17 We'll be able to break that out whether it be parts labor materials. However you guys want to set that up, be able to give you guys a web Progress billing as well, too, right? So if you build out that specific project and stages as well as be able to report on it all in the back end of things.

--- *Type of work* ---

CHRIS

9:35 So you had mentioned, you know, trying to figure out the preventative maintenance and what that looks like and trying to grow that business. So we're going to track all of that and be able to tell you profitability based off of each preventative maintenance contract. And is it worth renewing as well as all of the repair opportunity, revenue off of each contract, right?

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

CHRIS

9:52 Meaning you guys might sell a contract to make zero dollars, but you're getting a 1,000,000 dollars and pull through revenue, right? It's worth renewing type things.

CHRIS

10:05 We, we need to dive down into this one a little bit further. On the front end of things. We have a product called a sales manager tool, which is the CRM platform. Not going to get into this today. I'm gonna go more of, the execution side, which is our service trade core product. But just so you are aware, we have, a quoting proposal tool which kinda handles how you would quote your PMS, how you would quote, you know, whatever it is, some bigger projects type stuff. And it's going to handle the CRM side for your sales guys if you have sales guys... right? So who's quoting, what, how close are we to go? Where does each, what is each stage of each quote, you know, whether it's close, loss, close one, etcetera. Any questions on that before we kinda get into the thick of it?

--- Type of work ---

MIKE

10:56 Nope. I'll let you keep rolling.

CHRIS

10:58 Did all that make sense? And, and was that what you kinda are hoping to see?

MIKE

11:03 I think it makes sense? Yeah, I said we'll so we'll get in the flow. It definitely seems like you guys are heavy on the preventive maintenance side. Like seems like that's a real focus with it.

CHRIS

11:12 Yeah. So, so, we basically, hey, there's no lie. We believe that, there's, a surplus, a preventative of private equity money coming into this space where we live and that's the commercial industrial space. And one of the big things they want to see is your preventative maintenance schedules. What do you guys have reoccurring revenue?

--- Recurring maintenance ---

CHRIS

11:34 And we do a fantastic job of handling that. So kind of on that on a location. So, so we are now in the office view of service trade on a location page. We have the concept of a Bill to, right? So Maryland management is my Bill to Maryland. Management can manage 50 locations, 100 locations, whatever it is yep capital, an area on a location. This is where we will handle those reoccurring services whether they'd be annually, quarterly monthly services. We're going to give you when they're due, right? We'll know the piece of equipment that service is tied to the service line, the contract that, this reoccurring service is tied to, right? So we know that we have this person under this specific contract and that's going to help handle your reporting at the end of the year or however it is, you guys can run reports based off of contracts description. These are all the things we have to do. We can put a preferred tech. So if, you know, you have certain guys that handle certain customers and then obviously, you can build out these things whether however long you think this specific task would be. We can also say we're expecting it to be 650 bucks. And here's the items that are going to be associated every time we have to run this quarterly inspection or preventative maintenance.

CHRIS

13:03 Concept of recurrent invoices as well inside of service trade, we can talk some more about that if that makes sense. But that's basically if you guys Bill independently of any work being rendered at a location, each location is obviously going to have all of our jobs, right? And all of these are going to be hyperlinks to the specific job.

--- Assets ---

CHRIS

13:23 We're also going to track all of the assets at a specific location... right? So I can see and this is where I picked a bad location. I was talking about earlier where I'm not going to have, a pump station, but.

MIKE

13:36 Yeah, it's no problem.

CHRIS

13:39 You can see, I just grab this boiler. We'll track all the pertinent information, right? Model, number, serial numbers, bar code, Installation, date, warranty date, when it was manufactured, et cetera... right? And each piece of equipment will be tied back to all the services. So whether they'd be quoted, work, TAM, work, repair work, all that will be tied back to the piece of equipment, every job. You can also associate all of those jobs and invoices with each piece of equipment, yep deficiencies, right? So that's basically all of the repair opportunities. We're going to go through that process here. In a second. You can also see quotes. We have the concept of sub assets. So basically, what that means is parent child assets. If you will see a lot of the refrigeration side of the business, a lot in the alarm side of the business as well. But for example, you might have, a pump station, and then sub assets might be a pressure switch, one of them might be a flow meter, et cetera.

MIKE

14:36 Gotcha.

CHRIS

14:38 And then attachments, you can associate attachments with the piece of equipment as well. So whether it be whatever that is.

MIKE

14:46 Yeah, yeah. It's type agnostics, you could have like, you know, photos and, you know, maybe the user manual or something like that.

CHRIS

14:54 Yep. Exactly. So back on location page, as I continue to go down, we're going to track deficiencies at a specific location, right?

--- Quoting ---

CHRIS

15:03 So every deficiency ever captured every quote at a specific location, we'll track the status as well whether they'd be approved, submitted, draft status, etcetera, the contract, right? So we obviously know we have these people under contract. It's going to expire the 20 fourth. So we'll let you guys know if you need to renew that contract or not.

--- Tech On-site ---

CHRIS

15:23 Comments again, self explanatory, and then attachments again can also be set at a location page. Okay. Let's just go ahead and grab one of these real quick while we're here... two or three of them up there. So multiple ways we can schedule this out just because I'm on a location page, I'm just gonna go ahead and say, Chris get there today.

--- Tech On-site ends ---

CHRIS

15:48 We'll say like 11 30... job type. These were our preventative maintenance. I'm gonna go over another way to schedule out a job in a second here, but that's just grabbing a job from a location page... right? We're going to come back to this in a second. But other ways we can schedule out some jobs. You can already see that capital one job is now on Chris kid, well schedule. But this is our dispatch board. So over here on the right side, I'm going to track available jobs, right? And we're going to have filters on it. So I can see, hey, I only wanna see the different types of jobs that we have, where they'd be startups, hookups, designed, build outs, replacements, warranties, et cetera, right? So I can also filter out, however I need to see... the different jobs. We can also break everything out by regions too. So if you guys wanted to filter this out by regions, we can also do it by different offices. So we can, you can filter out if you had a, you know, a hydronics office versus an alarms office versus a pump station office. Et... this is where you can also come in here and add a job, right? So I can come in here and say homewood field is calling us... okay. And so we'll pre fill all of this information basically based off of data from Google, we can require customer po, et cetera. But I can schedule this today. So right now, I can immediately associated tech. So if I just know Chris kid, well, handles all of stuff for Johns Hopkins, right? And Chris are gonna get there the nineteenth... get there. 145. What's going on?

MIKE

17:41 So, if you said that, and if he already had something booked, would it alert you from that side of it or would you see it once you got back to the dispatch view?

--- Pricing ---

CHRIS

17:49 Once you got back to the dispatch view, you would see it... you know, so we could put it on the... excuse me, sorry about that. We can put it on a, you know, alarm valve... not to exceed 750 dollars. Let me, I will double schedule myself just so we can see what that looks like. What did I say? That first one was going to be 11 30?

--- Pricing ends ---

MIKE

18:17 Yeah, I think so.

CHRIS

18:24 Okay. So you'll see that Chris kidwellas now got two jobs here that he's double booked for, and then you would just slide this out and say, Chris get there at one?

MIKE

18:34 Okay, pretty simple.

CHRIS

18:36 Yeah, very simple. And again, all this is drag and drop as well. Up here. We're going to track basically a queue of jobs, right? So, this, if you think of this as a priority bucket, if you will of where a lot of our folks are just taking some phone calls and they're throwing this into a priority bucket and then they're gonna come down here and see who is available when, and then I can just kinda say, hey, it looks like Adam can get to that advanced technology center.

MIKE

19:05 Okay. Yep. Makes sense.

CHRIS

19:08 And that's just a big queue bucket if you will. As, as those things are kinda getting scheduled.

CHRIS

19:16 You can view this in different ways. We have a weekly view and I'm on a very small laptop. So obviously, the folks that are scheduling, we're going to have a bigger view of this. So if you guys are more of a... we schedule in four or eight hour blocks, you can look at it a weekly view. You can also look at it a monthly view as well.

MIKE

19:37 Okay.

CHRIS

19:39 Right. So multiple ways, you can kinda see that. And again, this is all kind a drag and drop.

CHRIS

19:49 Brett is probably going to be going to look for that job for his demo and not going to be able to find it... but you can kinda see how it's intuitive. Yep. So that's kind of what, our reactive scheduling looks like. Any questions?

MIKE

20:05 No, that makes sense.

CHRIS

20:08 Does that work for you guys?

MIKE

20:10 I think so. Yeah. Especially the queue idea is we'll usually try to plan something out for the week coming up. So, you know, Friday we'll plan out for the coming Monday's week. And then usually first thing Monday morning, you got a whole list of people that called over the weekend with issues. So it's trying to fit them in and rearrange stuff.

CHRIS

20:30 Yup. And we're actually also adding a whole bunch of AI behind the scenes around some scheduling stuff. So a lot of those things will be able to be using some artificial intelligence to help schedule that for you guys based on technician capabilities, who's the closest, what's required, who's capable of handling whatever calls are coming in.

--- Recurring maintenance ---

CHRIS

20:51 Okay? So on more of the predictable scheduling, right? So this is how you guys would handle your preventative maintenance as you start to grow that side of the business out underneath the service opportunities. This is just another report that we can run that says, hey show me all stuff due next month.

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

CHRIS

21:12 I want to see all of my reoccurring services. What most of our customers will do is click that button right there, but I'll just go ahead and grab a couple of these. Clicking that button is going to check all of them. I don't want to kill all of them... but I'm just gonna say, hey, because this is, our predictable, this is our preventative maintenance, right?

--- Recurring maintenance ---

CHRIS

21:31 So now we can start to get into some labor forecasting. We know what we actually have on the books for next month. However you guys are gonna start to set that up.

--- Recurring maintenance ends ---

CHRIS

21:39 Essentially. Now I've turned those eight or nine work orders into jobs. And I had mentioned how we can break out the different offices, right? So if you guys want to break out different offices, however you guys want to manage the business. So you don't have to see everything. We also have the concept of service lines. This is just

another filter to run reports on. Obviously, you guys wouldn't have all of these filters but again, we can do it by regions. We can limit it by area. We could do by price. Essentially, what that's gonna do is throw all of those jobs up on a map, right? So now, I can kinda have an idea and let's just go down to Texas, right? Some things that we now need to get done. And then again, this is all drag and drop, right? So I can say, hey, let's send Chris to Houston, Chris get there. Wednesday. All right. Well, Chris is in Houston. Let's go ahead and send them to Dallas as well... right? And then I can also add multiple technicians on a specific work order, so I could drag and drop that Sean on that one as well, right? And I can also say, hey, you guys are going to be there for two days?

CHRIS

22:51 And that's more of the predictable scheduling kind of things. Do you guys think that would be utilized with you? Or does that not matter?

MIKE

23:03 It could be. Yeah. So what we, at least the way we go about things now is we'll kind of create the jobs or work orders on a call it for the predictive stuff kind of beginning of each month. Let's say kind have them in the queue. We'll pencil them in and then see if we're able to keep doing or not.

CHRIS

23:27 Yeah. So you can also live that way here based off of, you know, available jobs as well... right? So, I can run reports based off of my available jobs and that would be part of that to you. And you guys would kinda have that in this side as well. Gotcha. So just depending on where or how you guys want that to live.

CHRIS

23:52 Gonna jump out into the field.

MIKE

23:54 Now.

CHRIS

23:57 Any questions before we migrate out to the field and show you the technician side?

MIKE

24:05 The other thing might be interesting to see just kind of how a quote would work as usual be building this from the office side?

--- *Deficiencies* ---

CHRIS

24:11 Yeah. Almost all of our customers quote from the office. Okay? And so I'm gonna kinda migrate that next. I was going to hit, the field side and capture repair

opportunity and then show you what that quote looks like.

MIKE

24:24 Okay. Yeah, that's cool. So.

CHRIS

24:26 We have, this job in the background... and let me try that.

--- Access to information ---

CHRIS

24:32 Yep, there we go. So here's what the technician mobile app sees. So compatible with any android or iOS device, you're looking at my iPhone here. So from a technician side, I can see I got to go through this capital one arena. And then I got to go to homewood field, but I'm gonna take capital one first.

--- Tech On-site ---

CHRIS

24:52 At the bottom of my screen, I have three clock features, right? Job prep in route. We can notify the customer too, right? So if I wanted to let you know that, hey, I'm going to be there at 11 30... right? You're going to get a notification that Chris kid well, is going to be there at 11 30. We're just gonna actually say that we're on site. You do not have to use these clock features.

--- Tech On-site ends ---

MIKE

25:17 Okay.

CHRIS

25:18 So, the guys don't have to clock in to come in here and get their work order and do what they're supposed to do. Okay? We, we chose a preventative maintenance, but you can imagine if this was, a service call, it would be... actually, I can show you because I think I did that homewood field that services will be going fits not to exceed 750 dollars, right?

--- Assets ---

CHRIS

25:42 So service call would look like that. We're just going to hang out in capital one arena for right now... three, three preventative maintenance things to do, right? We're on a generator, rooftop unit... comments this again, this can be self explanatory. I'm all done with this job, customers, happy look for the deficiency report.

CHRIS

26:12 Attachments. This is where I can start to build out that before and after pictures of everything that we're doing, right? Yep, you know, we won't go through all of that, but we can also associate the attachment to a specific service or job. So, for some of your bigger Construction projects that you guys might have multiple phases for, you can upload specific pictures for the different phases.

--- Tech On-site ---

MIKE

26:34 Gotcha.

CHRIS

26:36 Contact self explanatory paperwork that's where all of your PM checklist tasking lists, install checklist, start up, checklists, et cetera, would live. Okay. The next tile down is going to be handle all of your job items. So, because this was a PM, all of these things will pre load, but this is where I'm just gonna come in here and tell you, hey, we, yep, we used our three hours of our crane.

--- Tech time tracking ---

CHRIS

27:04 We got eight hours of operator. I'm gonna come in here and I'm gonna go ahead and edit these things because, hey, I got 24 hours of labor here. The important part here is I'm gonna go ahead and source this. I'm sourcing that to Chris kid. Well, because that is start me starting to build out my time sheet for the week.

MIKE

27:25 Gotcha. Yep.

CHRIS

27:28 So, as I go through these things, right? I'm not gonna go through all of them. I'll just add one more, right? We're going to go ahead and say, hey, yep. This is Chris kid. Well... because that builds out my time card for the week... let's just say that this was a TAM call and I want to show you how Chris kidwell would add some double time labor. I can come in here and say, hey, I got 10 hours of double time and that one will automatically source to Chris kid. Well.

MIKE

28:03 Gotcha.

CHRIS

28:07 Right. So that's me on a team job, just telling you got 10 hours of stuff there. Yep. This is also where I can come in here and tell you that I use the widget, right? So

this would be your database of your items.

--- Tech time tracking ends ---

MIKE

28:21 Huh.

CHRIS

28:22 With all of your costs associated with them, right? And there's me adding four widgets.

CHRIS

28:32 So that's kind of the technicians, whether it be a Tim project, preventative maintenance, et cetera, that's them kind of telling you what we're using out in the field, that's essentially gonna start to build out the invoice.

--- Assets ---

MIKE

28:42 Yep.

CHRIS

28:46 Next tile over is going to be our assets. I can see related. I can see all assets, right? I can come in here to see a rooftop unit. I can see a past history, right? So, whether it be PMS or service calls, I can see everything that was ever done on a specific piece of equipment.

--- Deficiencies ---

CHRIS

29:02 I can see every deficiency tied to this piece of equipment, whether it be fixed, open... attachments. Again, we talked about that back in the office, but to take a picture of that, right? Hey, this is a picture of the rating plate, what, whatever, right? So you can associate those pictures with that piece of equipment.

--- Assets ---

CHRIS

29:22 And again, you can see all the model serial numbers, all the pertinent information. And technicians can also edit this out in the field. Okay? So technicians need to change something, they need to create an asset, whatever they can do, all of that out in the field. Next tile over is going to be deficiencies.

--- Deficiencies ---

CHRIS

29:40 This is where I can come in here and create a deficiency, right? So, new repair opportunity and this is the starting process of a quote.

CHRIS

29:52 Right. And this is where I'm gonna go ahead and add some pictures... blah, blah, blah, right? You can put as many pictures as you want. I can do audio. I can do video, hey, for me to change out this pressure switch. We're going to have to shut the system down. And then it's gonna take eight hours and I'm gonna need a helper.

CHRIS

30:16 The next line down, we're going to go ahead and select the severity. We're gonna say that it's in operable. We're gonna put it on our piece of equipment... right? What we can just say a cooling tower... the status, right? I'm gonna say it's new because even if it was just something quick and I was able to fix it, I can, that's me creating a repair opportunity out in the field. Gotcha. So somebody from the office now, we're just gonna get an e-mail notification, something's broke. You guys gotta go quote this thing out.

MIKE

30:52 And...

CHRIS

30:52 I'm gonna jump to that as soon as we get back to the office and show you how coding that out from the office looks like. Are you guys capturing signatures in the field?

--- Tech On-site ---

MIKE

31:02 Not currently, but we've seen that as an opportunity with some of the things we've looked at as well. So it seems like a good idea.

CHRIS

31:10 So if you want to capture signatures out in the field, you're gonna go ahead and create a work acknowledgment, right? This is where you're gonna come in here and Mike, I'll select you. Hey, Mike here's, all my services items, right? And this is where you flip the tablet around to the customer and say, hey, Mike, pretending you are the customer. These are the three things that I did here's. All the parts and stuff that we had to use, blah blah blah, by the way we found a deficiency. You're going to go ahead and confirm and sign this thing. We typically turn this, send me a copy off. I'm gonna go ahead and send it to you just so you can see... and that's caption signature out in the field.

MIKE

31:51 Nice.

CHRIS

31:53 So, from there, essentially, we're going to go ahead and clock out. I'm gonna tell you that I finish my three things. If I, if I didn't I can leave one blank. We're gonna put some guardrails up for the technician, right? Hey, make sure you take a photo, make sure you double check to see if there's any deficiencies out there. But I'm gonna go ahead and finish clocking out from the technician standpoint. I am now done, I'm gonna go to my next job, which is the homewood field. I'm clicking directions.

CHRIS

32:27 And I'm driving up to Baltimore.

CHRIS

32:34 Any questions on the technician side?

MIKE

32:38 I think the only question I have just as we go through some of those when you're adding some of those TAM materials or even if there's things that we're already there from the job preloaded, is it showing that kind of costing and sale price info? Or is that configurable?

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

CHRIS

32:55 Configurable?

MIKE

32:56 Okay.

CHRIS

32:58 Majority of our customers do not allow the technicians to see the cost.

MIKE

33:02 That's where we want to be too.

CHRIS

33:04 Yup. So, most of those will be zero dollar items.

MIKE

33:07 Gotcha.

MIKE

33:13 And...

CHRIS

33:13 Do you guys track inventory?

MIKE

33:16 Not well, but we, something we want to be able to pull from these, you know, different softwares we're looking at. So the guys all have some set equipment on each of their service vans or trucks. And then we also have some parts that we stock, you know, back at the home base where they can, you know, stop in and grab things. And right now they're filling out, you know, little cut pieces of paper and handed it to their office staff.

CHRIS

33:45 Okay. So we can source parts too. And so, as a technician, as I'm filling this out, I can come down here item source, right? This came off of Danny's truck right here. I could say came off of, you know, the different trucks. Hey, I'm actually trucked too, so I can tell you how many parts we have at a specific truck and I can tell you... who's taking what?

MIKE

34:14 Gotcha. Yep. Perfect.

CHRIS

34:17 So, I'm assuming you guys want inventory capabilities as well at the truck level then?

MIKE

34:23 Yeah, that'd be great.

CHRIS

34:30 Do you allow your text to cut POS out in the field?

MIKE

34:33 Not POS per SE, but we do allow them to kind of make purchases. So it's either they'll call into, the office will cut the po and let them pick it up right on the spot or if it's something small, they might buy it themselves and then issue a reimbursement request. Okay?

CHRIS

34:52 Okay. Yeah. Okay. So you guys will need parts ledger which is a whole inventory system built underneath the service trade with the ledger system as well. Technicians can go in and say, you know, hey, I and a box of stuff, they would essentially create a po box of stuff.

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

CHRIS

35:10 Where am I trying to go? Right? I can say I got a box of stuff. I'm just gonna call another item box of stuff... right? We would add one. I don't have this specific, but they would take a picture. A box stuff cost a Penny because we want the office to actually fix that, right service line, whatever not sick time.

--- Tech On-site ---

CHRIS

35:40 That's just adding a box of stuff. Now, the office then would go in and they would take a picture of the receipt to make sure that they get compensated.

MIKE

35:46 Perfect. Okay.

CHRIS

35:52 Awesome. So back in the office here's, this specific work order. You can see technically, we're still in Progress because the office has to review it before it becomes customer facing.

--- Tech On-site ends ---

MIKE

36:01 Good.

CHRIS

36:02 You can see my three things here. I've completed all three tasks. Remember if I said I left one blank, that obviously wouldn't be completed and we would know we need to reschedule that one specific service. But as I grow down, you can see that, hey, you remember, Chris kid, well entered that widget.

MIKE

36:18 Yep.

CHRIS

36:18 Right here's, all of the parts. You can see that he's actually starting to do all of those things. You can edit this to Chris, you use six, not four, right? I can change that. Chris, you were there for six hours, not 10 by the way.

MIKE

36:32 Okay.

CHRIS

36:32 Right?

--- Tech On-site ---

CHRIS

36:33 So you can button up that work order before it actually becomes customer facing. And as I scroll down, right? We're gonna do, if you do clock in, clock out that's there here are the pieces of equipment Chris was supposed to be out there working on... but I know you want to see our quoting process.

--- Deficiencies ---

CHRIS

36:49 So here's a deficiency, right? So I'm gonna go to the deficiency page and I'm just quoting from a deficiency. If you were to quote from the location page, it's a very similar workflow.

MIKE

36:58 Yeah.

CHRIS

37:00 Right. So, hey, cool. It looks like Chris found the repair opportunity out in the field.

--- Quote templates ---

CHRIS

37:03 I'm gonna go ahead and create a new quote expiration date, end of the month. Let's go ahead and create this quote. And so now we are in a draft status of a quote based off of a repair opportunity, that Chris found out in the field. So the next things that we do is we typically throw a quote template up here where I got a 50 horse power motor replacement, right? And I consider those boiler templates, right? They're just kind of quick hitters so that you guys would build those out. This is typically what we need for this, but you can come in here and edit this as well, right? So we got a box of stuff... that we need... put it on some hvac and this box of stuff is gonna cost 5,000 bucks.

--- ST app contracts and pricing ---

CHRIS

37:51 You see my markup rules will automatically apply that based off of our contract rules.

MIKE

37:56 Gotcha. Okay.

CHRIS

37:58 Right. If, for whatever reason, that isn't good enough because there's customers being a pain in the ass. I can change it to 7,500 bucks. I'll flag it that the contract price should have been 5,500, but we can manipulate those quotes as well. I can also choose how I want to show this to the customer.

MIKE

38:15 Yeah, awesome.

CHRIS

38:17 Right. So, I'm not gonna go through the process of a TAM, but let's just say it was a TAM quote, right? I just want time and materials only or I just want to grand total it... we can group it out by services, right? So if it's a bigger project, we call them services phases. So if you had four phases on a project, you can group them out by the different services.

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

CHRIS

38:41 Can go ahead and click save. This all looks good. I'm gonna turn the audio off because that was meant for... the office, not, the customer... and I can send that to you, Mike, do you have access to your e-mail you can kinda see what the customers would see?

--- Tech On-site ---

MIKE

39:00 Yep. Yeah. I got the alert when you're traveling right away, the work acknowledgement one just came in now. So seems like a bit of a time delay. But yeah, I'm getting so.

CHRIS

39:11 It's gonna be a little lack. You might want to refresh your inbox and you should see it then. And if I turn my video off, sometimes it'll move faster.

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

MIKE

39:22 Yeah. Sometimes it's on our end too.

CHRIS

39:27 But, yeah, you'll if you refresh your inbox, you'll see a quote and you'll see a dark services sent you a quote or something like that, right? Or services is our dummy contracting company. And then you'll scroll down to the bottom and you'll see a view and respond to quote and it's going to bring you up to this page, right?

MIKE

39:45 Yeah. There we go. Cool.

CHRIS

39:48 So scroll down at the bottom. You'll see view and respond to quote.

MIKE

39:53 Yeah, show me material, other parts, photo, the terms and conditions, and then I see the approve or request change.

CHRIS

40:05 You know, go ahead and approve it.

--- Quoting ---

MIKE

40:14 Okay. It should be approved now.

CHRIS

40:17 So that quote status now has changed to approved. We're going to track a full history of that quote, right? So I can see that we added some pictures, this technician out of these pictures. We got to that draft. You remember the draft status. Now, we actually submitted it. I can see you viewed that quote. I can see you approve that quote with po, one, two, three four, five, six. So full history from that quote, we can also, we can then go ahead and add that to an existing job where I can immediately create a job from that specific quote and I can just say, hey, it's got to be done by the end of the month.

--- ST app contracts and pricing ---

CHRIS

40:49 It's all of these attachments, right? And if this was a bigger project, this is where I could go ahead and create a project and build out the budget et cetera. But that's now done, this job is now going to be in the queue of, hey, you need to go schedule this thing and get this repair opportunity done.

CHRIS

41:10 Any questions on that quoting process?

MIKE

41:15 The, on the high level, no.

CHRIS

41:17 Is that kinda what you were looking for?

MIKE

41:21 More or less, yeah. Yeah. I mean, the, especially the configuration with the viewable, that was great. Yeah, I think the parts labor items. Yeah, that's all. There is a little different view than I'm used to, but that's not a problem. Just taking me a second to wrap my head around it. Yeah, for follow things are tracking.

--- Quoting ---

CHRIS

41:50 Awesome. So, the, yeah, let's go ahead and leave the other two tabs that I want to show you real quick is where you can come in and run a report of all of your quotes. So just right here under quotes, we have quotes and deficiencies, but I can come in here and show me all quotes, right? So here's every single quote that we have, show me only quotes that have been submitted and viewed but not approved. You know, that expire before whatever date... right? So here's everything customers taking the time to look at and open but not approved. We can also bulk send those back out to the customer too. So end of the month, you guys wanna get those quote approval rates up, you just click that button and all of those quotes go straight back to the top of your customers inbox, gotcha. Right? Who they're assigned to sales people, etcetera. We can also run that by deficiencies, right?

--- Deficiencies ---

CHRIS

42:43 So you can run reports of all, show me all deficiencies. So whoever job it is to make sure all of the deficiencies are being quoted out here that they would live here. So they would come in here, grab this deficiency and go ahead and get that thing quoted out. You can say, hey, where does each deficiency stand quoted out for repair, fix, et cetera. So all sorts of reports that you can run from, the back office side of things.

CHRIS

43:10 Gonna rewind a little bit because I want to finish closing this work order out and then get into a time card and show you what that looks like.

--- Assets ---

CHRIS

43:18 Yep... we got distracted at deficiencies. The next tab down is going to be invoices, which is blank comments. Again, these can be scheduling notes. These can be technician notes. These can be internal or external contact comments.

MIKE

43:33 This could be for again the job itself or for the overall customer.

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

CHRIS

43:38 Yes. If you have comments where you don't want the customer to see, right? Don't send Chris, they don't like him, right? You would leave that as an internal comment if you wanted to make it external, right? You can say, nope, let's make it visible to everybody.

MIKE

43:52 Okay. Cool.

--- Tech On-site ---

CHRIS

43:56 Here's our pictures, right? So that on this specific job, this would be the pictures here's. My work acknowledgement if we, if you guys had to require a tasking sheet or PM checklist, that would be their startup checklist, etcetera. So, from that standpoint, I'm essentially going to go ahead and complete this job... and then we can immediately create an invoice.

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

CHRIS

44:16 But what a lot of our customers like to do is go ahead and send what we call a service link and this is kind of the customer engagement in a digital way, right? I just threw that into your inbox, but a service link... it's just going to be the summary of everything that's going to be happening out there, right?

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

CHRIS

44:33 Chris kid was out there to do this preventative maintenance, right? If this was TAM, it's say, TAM, obviously, he was out there at 11 30 here's. The three things that he did, blah blah blah here's, all the parts and labor and everything that he used here's.

--- Deficiencies ---

CHRIS

44:48 The comments. You can see. I remember, I turned that one comment on... the customers would have access to all of those pictures videos. And again, you can pick and choose what you want to show to them and know by the way that deficiency that was found.

CHRIS

45:04 And then the next status is we're going to go ahead and actually invoice this job.

--- ST app contracts and pricing ---

CHRIS

45:10 Again, we can move things around based off of how we want to build this invoice out of this was a project and we had to do some Progress billing and I don't want to Bill out these phases, right? I would just turn them off. And now that invoice isn't going to carry those phases.

CHRIS

45:28 But I'm gonna go ahead and generate an invoice. Our margins are pretty bad because I turned one of those one of those services off. But the point there being, is we're going to track all of your margins, for all of your jobs. So you guys would have that visibility.

--- Invoicing ---

CHRIS

45:44 You can see the invoice again, we can pick and choose how we want to show this to the customer. Yep... right? So we can show high cost et cetera. I won't actually send you an invoice. If, because most people will have let me rewind a little bit. I'm sorry, jumping the gun at this standpoint, there will be a button here that says send the Quickbooks.

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

MIKE

46:05 Gotcha. Okay.

CHRIS

46:06 And you can invoice out of Quickbooks. If you choose to invoice out a service trade, you would click send that invoice link very similar to that quote workflow customer. Your customers would get an invoice link, right? Obviously, this would be your guys logo. Again, we can pick and choose how we wanted to show all this out. I just line item it all out. But the cool thing about that is the customers can click this blue arrow and I take them back that service link. So they know what that invoice is tied to.

MIKE

46:34 Gotcha. Yep.

CHRIS

46:36 So, that's kinda the one of the cool things about invoicing on a service trade.

--- Invoicing ---

CHRIS

46:39 And then if you're in the state, you can also click pay now and your customers can go ahead and pay with a credit card or pay with AC. H. Okay. That's if you

invoice out of service trade, if not, there'd be a button here that says, send a Quickbooks?

--- Tech time tracking ---

MIKE

46:54 All right.

CHRIS

46:59 Everything is looking good. So.

MIKE

47:00 Are...

CHRIS

47:01 Questions?

MIKE

47:02 Making sense?

CHRIS

47:07 So, the next thing that we have... is going to be, our time card. So, this is where the technicians are gonna, you know, at the end of the week or whatever it is. They're going to take a look at their time card and you can see we can do double time over time, sick time as these technicians are entering all of those jobs, right? I was in homewood field. I entered 10 hours of labor there. I entered six hours of labor here, right? The technicians are gonna come in here and take a look and see and I'm assuming you guys are gonna want to do this by labor items, not clock events, can clock events, but I'm assuming you guys are by labor items, right? And you can see this and they'll come down here and say, hey, basically all these will all of some and populate for grand total, 32 hours this week. Technicians are going to go ahead and say, yep, this is all good. They're going to go to submit that's now going to be in their managers inbox essentially. And then the manager would go ahead and they can view it as well to make sure that it's good current status is submitted. But the manager would then go ahead and click, you know, let's just say that they had five guys that they manage. They would hit export to selected. And then we can bump that out into an excel or CSV file.

MIKE

48:27 Perfect. Yeah.

CHRIS

48:29 And that's how, the time card works?

MIKE

48:32 Okay. So.

CHRIS

48:36 Thought process of what you've kind of seen today, does it make sense if it makes sense? You know, we kinda want to flip the microphone over to you?

MIKE

48:47 Yep. Yeah. I mean, I think if you have captured a lot of the things we looked at or hit on the, a lot of stuff from that punch sheet... yeah, I mean, the idea of the kind of the deficiencies is probably kind of new to us or is that terminology?

--- Tech time tracking ends ---

MIKE

49:04 So that's the biggest piece I'm chewing on us. This all goes is I can see it especially like you said, the main business you've been working with the hvac and, you know, the fire thing for it's very routine preventative, yup. And you showed me the scheduling it, I can do the ad hoc stuff too. So I'm just at this point trying to wrap my mind around and make sure... the flow and just the, it would still be good with how we're trying to do it because I mean, a lot of the pieces, it looks like we're all still there.

CHRIS

49:38 A maintenance flow because that's typically a little bit of a more complex workflow, where TAM is very similar. Where, you know, for this specific service call, right? We just, I just fired off a service call at this capital one arena, and then the technicians gonna go build out that specific work order and I start to add all the parts and labor and everything else like that.

--- Access to information ---

CHRIS

50:07 Right? I'm just doing this from the office view, but the technician would do that from the mobile side that we kinda went through. So you're right? You're right? I tried to show you kind of two workflows wrapped up into one, which can be kind of confusing.

MIKE

50:23 Yeah. So it's not a problem though.

--- Type of work ---

CHRIS

50:26 Yeah, it's not a problem in most of our business. Most of our customers have that, you know, they do the preventative maintenance. Obviously, they do the service calls and then they do, the project work too. The, the retro fits the swap outs and everything else.

MIKE

50:40 Yep. Alright, perfect.

--- Tech time tracking ---

MIKE

50:41 Yeah. One quick thing on the time. I guess from the time card view, is that where you would enter the non billable stuff too?

CHRIS

50:52 Yeah. What do you mean? Non billable stuff though?

MIKE

50:57 Let's the Bill to the customer. So if you had sick time or holidays like us as it all in one... yeah.

CHRIS

51:05 So stuff that you just need to pay the guys for, but you don't want to capture cost against the customer?

MIKE

51:11 Correct.

CHRIS

51:12 Yeah, this would live right here. They would come in here and say, you know, hey, I got eight hours a sick time... and then it would update from 32 to 40.

--- Tech time tracking ends ---

MIKE

51:23 Perfect. Okay. What I was gonna say?

CHRIS

51:33 How does I think you guys were looking at service box and BuildOps?

MIKE

51:39 Right. How does that?

CHRIS

51:41 How do we compare? What does that stack up look like between the two?

MIKE

51:45 You seem... pretty similar to BuildOps? Even just some kind of the look and flow of things. Service box is kind of a much simpler one. So, it's really just deciding kind of which approach we take is, do we go kind of all in out the gate or do we kinda ease into something simple just to get the guys used to using something? And then maybe in a couple of years up our game to something more complex.

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

MIKE

52:18 Sure that's part of the discussion here that's what I wanted to check on. So, I know when you were asking about the inventory like that might be like a different module or system? Like is it still accessible from the same area or do you have kind of different packages or pieces?

--- *Accounting integrations* ---

CHRIS

52:36 So, so we do sell service trade as a modular software platform. So we have different modules, but they're all accessible under one platform.

MIKE

52:45 Okay. So you can kind of all a cart to the extent what you need and.

CHRIS

52:52 Yeah, because we have, yeah, yeah. So we have some customers that have very robust inventory management problems that partsledger solves that solution for where we have some folks that are like, hey, I don't care. Just allow the technician that he put a box of stuff in there and it costs them 500 bucks.

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

MIKE

53:11 Yep. Okay.

CHRIS

53:13 We also have some people that are like, no, I manage my inventory on a truck level down to the Penny and I know every single part. And I need to have a system that can handle that on a ledger system, which is why, which is why we do it that way.

--- *Purchase decision* ---

MIKE

53:27 Okay. Understood. Yeah... yes, I think we're running close on time here.

CHRIS

53:35 Yeah. What, what is this? I mean, are you guys trying to do this year? What does the timeline look like when, you know, when do I follow up?

MIKE

53:44 Yeah. I mean, we're looking to make the decision this year. Like I said, you guys, I stumbled on you guys on really the back end of our process just because, yeah, we, some of the things with BuildOps, they were a front runner and some things fell apart. So, we've been kind of taking a quick pivot to see what else is out there.

--- Purchase decision ends ---

CHRIS

54:02 Okay. What, what fell apart with them?

MIKE

54:06 Part of it was the time entry, which is, you know, why I was asking about that. And part of it was just the kind of... I'll say sales cycles are almost, you can get into the personality like we want to have like a closing discussion. And it got forceful were like, all right, that's not the type of people we want to do business with.

CHRIS

54:29 They're very aggressive.

MIKE

54:31 Yeah. And, their terms, it was that's what the breaking point where it was... annual contract, pay everything upfront. And then they kind implement stuff for like, well, what if when we go through implementation, which everything you're selling us is banking on? It doesn't work out like we're stuck and we're not committed.

--- Purchase decision ---

CHRIS

54:53 Yeah.

MIKE

54:54 Like give us some type of out for the first year or six months and then we'll talk and it was the terms of the terms... a contract. We expected you're signing it tonight. I was like, it's like that.

CHRIS

55:11 That sounds very stereotypical then. So, so on that note without me being that guy is, you know, hey, how can you help me lay out my next steps?

MIKE

55:27 Yeah. I mean, honestly, if you could send me this recording afterwards, I think that would help me to, I know we went through a lot quickly so I might need to take a watch or two to make sure I absorb everything. And then... I mean, yeah, I mean, I'll follow up with you if you don't hear from me and you want to ping me in a week or two that's fair as well. Okay.

CHRIS

55:51 Yeah. So... do you did today go well enough to send you pricing?

MIKE

55:58 It wouldn't hurt because like I said, at the very least, I would certainly keep in the running if we decide to go the like I said, the simple service box approach, we know that is not a five year solution.

--- *Purchase decision ends* ---

MIKE

56:14 So even if this, we decide we need to go that route to get something going, you know? But if I keep service trade in the background and we revisit it in a year or two, like that is very much a possibility.

CHRIS

56:30 Okay. How many field users would you have in the platform?

MIKE

56:35 Let me see. I was just looking at that.

MIKE

56:44 I get you the exact number. So we probably have some hybrid personnel as well. So we would have kind of our managers would do office and field. I don't know if that matters to you or just talking straight up field.

--- *Pricing* ---

CHRIS

57:02 Yeah, that's good to know. I can kind of if they're going to need field access, they'll need a license, but I can because they're not using it like 100 percent. We can kinda get creative with pricing on it.

MIKE

57:13 I mean, they'd probably be like... 60 70 percent though them in that way.

CHRIS

57:21 Yeah, that's basically what it is 50 percent license discount if you will.

MIKE

57:25 Okay. So, we got... a 21, just full on text.

MIKE

57:36 Then our manager group would be... another seven.

CHRIS

57:45 Okay. Yeah. So the managers will be considered when you see the quote just so you're aware the managers will be considered helpers.

--- Access to information ---

MIKE

57:55 Okay. And then, does it matter for straight up office staff?

CHRIS

58:00 They're free.

MIKE

58:01 Okay, cool.

CHRIS

58:03 Staff, admin staff, HR type folks. They're free. It's the guys that are out in the field using the app, punching their ticket. It's telling you how many pictures, you know, putting all the pictures, telling you how many parts they use. They're, the licenses.

--- Access to information ends ---

MIKE

58:17 Gotcha. Okay. All right.

CHRIS

58:23 I will send you this quote. So what I will do is, I know we're coming up on the holidays. So this is gonna take maybe an hour or two for the recording to process. I will send you that recording with like a recap space. I'll probably ping your inbox Thursday or Friday to kinda be annoying.

MIKE

58:39 Yeah, that's certainly fair.

CHRIS

58:42 Just to bring it up to the top and then probably try to touch base with you on Wednesday of next week.

MIKE

58:49 That...

CHRIS

58:49 Works that would put us at the 20 seventh.

MIKE

58:52 Yep. I'll be around and...

CHRIS

58:55 Fingers crossed. You were able to kinda listen to that recording. You'll have a bunch of questions for me and we'll see if we can't get a deal done by the end of the year.

MIKE

59:04 Okay.

CHRIS

59:05 All right. Mike. Well, hey, I appreciate you taking the time.

MIKE

59:08 Likewise. I appreciate you jumping on short notice. I was just yesterday, I reached out and be a jump through all this stuff is a lot of info and take me a little time just to digest it.

CHRIS

59:20 Yeah, I open up the fire hose. I apologize, but I'll get that recording over to you and let you try to digest that.

MIKE

59:27 No, that's awesome. Good.

CHRIS

59:29 All right, Mike, we'll be in touch. Thank you.

MIKE

59:31 Thank you very much.

CHRIS

59:32 **Bye.**

MIKE

59:32 **Bye bye.**

The End