Thermal Concepts Follow Up Deep Dive

Katie Mullen with Thermal Concepts, Inc
Recorded on 11/27/23 via Zoom, 1 hour 34 min.

Participants

ServiceTrade

Katie Mullen
Field Manager

Lauren Rice
Director of Enterprise Sales

Thermal Concepts, Inc

Chris Parra
Operations Manager

Other

Topics

Transcript

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

KATIE

0:00 Actually, if I make you cohost, can you accept admit people? I have to run to the restroom.

LAUREN

0:07 Yeah, sure.

KATIE

0:08 Okay. I'm gonna go ahead and do that then... and I will be right back.

LAUREN

0:14 Okay.

CHRIS

1:16 Let's see. Hello?

KATIE

1:17 Can you hear me?

LAUREN

1:18 Yeah. Hi, Chris. You sound like here in the conference room?

CHRIS

1:26 I, yeah, let me... adjust this. I'm here with Joe. I'm trying to get my screen displayed. I can see you?

LAUREN

1:46 Onto the big screen, you mean?

CHRIS

1:49 Yes. Hi. So let me see if I... hi, Katie.

KATIE

1:58 Hello?

LAUREN

1:58 There, how are you?

CHRIS

2:02 Doing good, doing good with Joe, trying to get this up on the it's none of those segments. Are you on? Yeah, it's not, has nothing to do with that just in case you're wondering... go to connection guy... that's where I... go down to.

CHRIS

2:32 Sure.

CHRIS

2:40 That's not sure.

CHRIS

2:47 Right here... but it keeps... trying to connect that's fine. Okay. Well, I got you on the laptop right here with Joey. He can see you guys. So, if you want to get started... okay? Are we waiting?

KATIE

3:07 In for anybody? Else? Is Lewis or anyone joining us? Just?

--- Purchase decision ---

CHRIS

3:14 Right now, we're good. Okay, perfect.

KATIE

3:19 Well... has anything come up since the last time that we met, any additional?

LAUREN

3:27 Questions? Any?

KATIE

3:30 Insights any, anything?

CHRIS

3:34 No, actually we're just looking forward to seeing the rest of you know, what you're gonna show us with today for today? Did you have anything in?

KATIE

3:46 Mind, so.

KATIE

3:57 No, no.

CHRIS

3:59 No, we're good. Okay. Thank you.

KATIE

4:02 Perfect. So, this is the agenda that I laid out just based on kind of what you had said, you guys wanted to cover oops, cover again after last meeting. So we'll go through... service trade and I'll just show you this.

--- Recurring maintenance ---

KATIE

4:22 This is going to be in no particular order of the creating the maintenance, but we'll go over how you can set up some different frequencies of, you know, recurring quarterly, annually, whatever it may be... how to set up a job with different services and how to set up new services.

--- Purchase decision ---

KATIE

4:41 And then also setting up a job that has multiple visits. You know, we talked about last time that's something that is pretty important for you guys as workflow. So we'll go over that, and then we'll kind of revisit the quoting both from the field and from the office, and then we'll go over some initial pricing and, some next steps. Does that sound pretty good? And what you?

--- Recurring maintenance ---

CHRIS

5:11 Guys were hoping to cover today. Yeah.

KATIE

5:15 Okay, perfect. If you have any questions, feel free to stop me... but I'm gonna go ahead and jump into service trade. You guys can see this. Yeah. Okay. So what we're looking at here is a location page, so you can see that the company is here but, this is a specific location. So what you're gonna have on this page is you're going to have services that you perform for this location in... here, you can see if they're quarterly or if they were just one time things. So you can see the frequency in which you perform each of these services.

--- Assets ---

KATIE

6:05 You can set up recurring invoices, if that's something that you guys need. You can also see all of the past jobs or you can add a new job straight from here. You can also see the assets, the deficiencies quotes, different things like that. So... any question with just like the location page here?

CHRIS

6:31 No, looks good.

KATIE

6:33 Okay. So I'm gonna walk you through adding a new service. So this is going to be a service that is specific to this location. You're just gonna go ahead and click the add new service. You can tie it to an asset. If you, if you know the assets that they have.

--- Quote templates ---

KATIE

6:51 Otherwise, you can tie it to, the building or just put no asset. If you select the asset, it's automatically gonna fill in the service line. You can also add a contract if you want to. Again, you don't have to. And then this is where you guys would set up your different descriptions.

--- Recurring maintenance ---

KATIE

7:10 So here you can see that it says preventative maintenance, you know, gives kind of an outline for your technicians to know exactly what they're going gonna perform. So I'm just gonna copy and paste that so that we have something in there. If you do have a preferred technician to perform this, you can go ahead and assign it here, but you again, don't have to, and then you can put in estimated prices, estimated duration so that, you know, when they're scheduling, they have an idea of how long this is gonna take. And this is where you're gonna set up the frequency. So within service trade, you can get as granular or as generalized as you want. So you can say, hey, this service has to be performed every third Wednesday of each month or, you know, whatever it may be or you can say it just has to be done in the month of June or, you know, whatever it may be. So we'll just go ahead and put a whole month. So then you can select when the next due day is. If you're scheduling it now in November, but it's not due until January, whatever it may be. And then here's where you can set up how frequently it occurs. So if it's a monthly and annually, all of that good stuff. So if it's every two months, six months, whatever it may be, you can set it up in here and then you just go ahead and save it and you're going to have a new service. So any questions with that? Does that make sense?

CHRIS

8:49 Yeah. That makes sense. Monthly, quarterly, the time right there? Okay?

KATIE

8:55 Yeah. So this is gonna.

CHRIS

8:56 Show.

KATIE

8:57 Minutes do.

CHRIS

8:59 Okay. Is there... as it's coming new? Is there an alert, that goes out to the dispatcher?

LAUREN

9:12 There's not an alert, but there's a report that you can pull that kinda shows all the upcoming work.

--- Recurring maintenance ends ---

LAUREN

9:18 What we've seen in practice is made like weeks before the dispatchers and coordinators or like pulling that report work orders, and then it will show up in like a bucket. If it's coming close to date, it'll show up on the main dashboard as well as all over.

KATIE

9:39 Yeah. And, and on the scheduling and dispatch board, you can actually filter by due soonest. So it'll show you.

--- Recurring maintenance ---

CHRIS

9:47 And these automatically, once you select the date, I'm assuming these automatically show up on the scheduled.

CHRIS

9:53 Or...

CHRIS

9:55 Dispatch... as long as...

LAUREN

9:58 A nuance, there's some nuance to it. So you can create these services like tell me how much of your business is like with what percentage of your service revenue comes from like planned maintenance. Do you know?

CHRIS

10:10 Percentage of service work are planned maintenance?

LAUREN

10:13 Yeah.

CHRIS

10:16 Yeah. Joe was saying it's probably about 45 percent right now.

LAUREN

10:20 25 or five. Okay. I thought I heard you wrong. Okay, good. If you were saying five percent. I was like, well, maybe this isn't the right workflow. But, but this is a, this is a good workflow for, so your question was about... sorry, I lost my train of thought. This is.

--- Recurring maintenance ---

CHRIS

10:41 My customer is being, that is showing... the date right there and I know it says some time, right? You're not giving us specific date, how would that show up on a dispatch board or does it?

LAUREN

11:01 So, that just gives you like a whole window, usually what we, what we've seen is like if you're going out quarterly, it has to be some time within that time frame. And then like Katie said, it would show like juice units and what the services do, like you set up the service. And because it varies like when you might perform that work within that window, right? You can basically pull that report and bulk create these work orders when they're coming up to be due, and then you can filter your dispatch board or like, the scheduling view to show you like how to like when it's...

--- Recurring maintenance ends ---

CHRIS

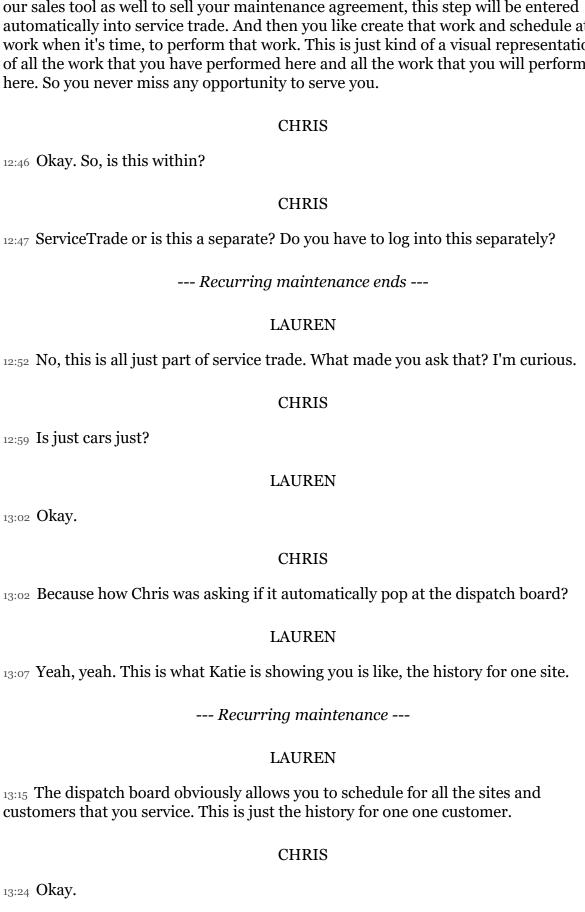11:39 So, so let me ask you once, let's say this month, we figure out a date, what's best for us to schedule within November and we walk in like let's just say tomorrow, right? They can go in there the way you pick that date, they would go back in there and select tomorrow's date. So it shows up on the board, or is that a little different? They go somewhere else to do that?

--- Recurring maintenance ---

LAUREN

12:09 They would go like to the actual like scheduling views, to do that. This is just showing you like contractually, what work form for your customers, if you're using our sales tool as well to sell your maintenance agreement, this step will be entered automatically into service trade. And then you like create that work and schedule at work when it's time, to perform that work. This is just kind of a visual representation of all the work that you have performed here and all the work that you will perform here. So you never miss any opportunity to serve you.

CHRIS

12:46 Okay. So, is this within?

CHRIS

12:47 ServiceTrade or is this a separate? Do you have to log into this separately?

--- Recurring maintenance ends ---

LAUREN

12:52 No, this is all just part of service trade. What made you ask that? I'm curious.

CHRIS

12:59 Is just cars just?

LAUREN

13:02 Okay.

CHRIS

13:02 Because how Chris was asking if it automatically pop at the dispatch board?

LAUREN

13:07 Yeah, yeah. This is what Katie is showing you is like, the history for one site.

--- Recurring maintenance ---

LAUREN

13:15 The dispatch board obviously allows you to schedule for all the sites and customers that you service. This is just the history for one one customer.

CHRIS

13:24 Okay.

KATIE

13:26 Yeah. So once you have these services setup, you can also create jobs with those services. So if I wanna add a job here, I can just do it this way, add job. Again, it's gonna say when it's due, you can select the job type. So maybe it's preventive

maintenance, you can tie it to a contract. If you want. Again, you don't have to, and then you can go through and select which services you want to tie to this job or this appointment. So if we pick, let's say we just pick a couple of these that we're gonna.

CHRIS

14:08 Those are all the assets tied to the contract, correct? Okay?

KATIE

14:15 And then you can also create new services this way. But we're just gonna do this for now and then I'm gonna say I would like to schedule this job and then I can go ahead and schedule it this.

--- *Quote templates* ---

CHRIS

14:26 Okay. Got you.

KATIE

14:29 Yeah. So if I wanted to put it for the 20 eighth... you know, at whatever time, then I can, then I can create it this way... and then I will have a job within service trade. So this is what the job page looks like.

KATIE

14:52 So again, it's gonna show exactly what we're doing on this appointment and it's gonna have the parts labor an item tied to it based on which services I selected.

--- *Assets* ---

KATIE

15:07 So this automatically pulls all of this information. I can see, the assets that are tied to this specific job or job within service trade is like a work order. So we're going to have all of that. And then any comments that are from the location are gonna transfer over onto this job as well.

--- *Assets ends* ---

KATIE

15:30 So all of that automatically populates. Okay. Does that make sense? Yeah. And then if I need to add a technician, I can go ahead and add it easily here.

KATIE

15:49 So that is the workflow for scheduling out different jobs. Any questions with that?

CHRIS

16:07 Not for me. Are, you good on that on? Good? Okay. We're good here.

KATIE

16:13 Another thing that I wanted to show you because it came up was the idea of scheduling a job for multiple days. So let me see if this one... is scheduled yet. Lauren, do you know if I can unschedule this?

LAUREN

16:36 I know that you can, I don't know how to do it.

KATIE

16:41 Okay. Let me see.

LAUREN

16:44 I would have to defer to someone smarter than me.

KATIE

16:48 I'm just gonna create a new job and not schedule it so that I can show you what it looks like to schedule it for multiple days.

KATIE

16:59 Let's see.

KATIE

17:13 Okay. So this is another job that doesn't have an actual appointment assigned to it, so I can go here and schedule this appointment. And when I click on this, there is a button right here that says, choose multiple days. So if this was a situation where I knew that they were going to have to go out on the 20 seventh, 20 eighth, 20 ninth and thirtieth, I can select those dates, press done, and it should be creating, those different appointments, for each of those days. So it's gonna have all of these, but it's gonna be split between four different visits which is, you know, something that came up last time that we were, we met. So it's pretty simple to schedule those out. This is the 20 eighth, the 20 ninth, the thirtieth, and it's all right here.

--- Assets ---

KATIE

18:17 Does that make sense?

CHRIS

18:19 Yeah. So this view right now, you said this is connected to the site or what's this view your em, where you can see it's tied to the site or?

KATIE

18:31 Right now is a?

CHRIS

18:32 Job to the job?

KATIE

18:33 Yeah. And it's all hyperlinked so, I can click into these and go back to, the company page or the location page pretty easily.

--- Assets ends ---

KATIE

18:45 But, yeah, this specifically that we're looking at right now is a job previously. We were looking at a location. Yeah, good question. Yeah. So... is that a workflow that you guys could see yourselves using the scheduling multiple days?

CHRIS

19:11 Yeah. I mean... the service trade probably has different ways of doing that. This is probably not only one, right?

KATIE

19:20 Yeah, definitely. There's...

CHRIS

19:22 There's quite a few...

KATIE

19:23 Different options.

CHRIS

19:24 Yeah. So, you know, I guess it just depends on, you know, navigating the dispatcher. We have a job open and they have the board open. They can drag and drop jobs in off the board and off the board, right? And assign it to. Yeah, just, this is just another way of doing some scheduling that's fine. Go ahead.

--- Paper process ---

LAUREN

19:45 It, does it seem like more complicated than using a scheduling word? Is that sort of what I'm hearing?

CHRIS

19:54 Not complicated. I don't think it's complicated. I thought, you know, this is just another way of doing it. So, it seemed pretty simple to me.

LAUREN

20:00 Okay. I was just checking because he brought up like a scheduling board a couple of times and that's not exactly what we were looking at. Maybe it would be helpful to show that again as well.

--- Paper process ends ---

CHRIS

20:09 No, yeah, I was just saying this is just another way to get job scheduled cool.

LAUREN

20:15 That's right? As they say, there's more than one way to skin a cat. So it's just showing you all those ways.

KATIE

20:22 Yeah.

CHRIS

20:26 Okay. Is looking at the act on this job?

CHRIS

20:30 Were over there?

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

CHRIS

20:31 I see send service link. What is that send service link?

KATIE

20:37 This button here. So after they've gone out and they've collected, you know, photos, and attachments and added their notes and you can send them. It's basically like an after visit report denoting, what services were performed, who went out, different things like that?

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

KATIE

21:00 And then those are all details that they would be able to see through, the customer portal that Lauren showed you guys last time we were there, so they would be able to see their upcoming jobs and then the recently completed jobs. So if I like, if I click into one of these, I'm going to be able to see all of the details, of that visit, the service over.

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

LAUREN

21:27 Can you pull up a service link Katie?

KATIE

21:30 Yeah. In fact, I might be able to just see this one.

LAUREN

21:37 Go to the preview at the top left, right there. It's basically the customer view of the work order.

KATIE

21:46 Yeah. So they can see, the appointment and who was there, what was performed?

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

KATIE

21:58 Okay. Yeah.

KATIE

22:04 Any other questions with any of that information of just how to set different services, up, different appointments, different visits, different jobs, any of that?

CHRIS

22:19 No, no, no, it looks fine. Looks pretty easy to set that up.

KATIE

22:24 Okay. The other thing that you guys wanted to go through was quoting... based on our last conversation, what were still some of, the question marks around quoting that we can help address?

CHRIS

22:43 Just wanting to see, how, from a technician, how they would on their side build the quote to send into the office? Okay?

KATIE

22:54 Let me pull that up then.

CHRIS

23:01 In a process.

LAUREN

23:08 I heard part of that Joey, but was there a question about how text we'll see the markup?

CHRIS

23:13 Yeah, concern that I have was the having more information than they really need. All they need to do to be able to tell us the better pricing as well as ours. It seems to me the way you guys quote is set up is for them to sell it on the spot to the customer, which I get, but... I mean, that might work for five percent, five to 10 percent of what our text deal with to me that's more geared toward residential type of standpoint, because you're dealing with customer directly... but the bulk of what our guys are dealing with is not really, we need them getting involved with pricing things.

--- Deficiencies ---

LAUREN

24:01 Got it. So then in that case, probably use the deficiency workflow to, for the technicians to share what needs to be quoted and then have, who does the quote in the office generally?

CHRIS

24:21 Our, our estimator?

LAUREN

24:23 Okay. I would, Katie, I would show them the deficiency process again and then we can set up those deficiencies to notify the estimator. Hey, here's something that needs to be quoted. And when the technician identifies the deficiencies, they can, you know, add... a picture of the pricing from the park house or a note of what the pricing is and how many hours. So, I'll let Katie kinda show you what that efficiency process looks like again.

KATIE

24:55 Yeah, pull up. This is the temecula valley hospital that we were working in. So, like she was saying, just have them put together deficiencies. So coming in here, add deficiency here in the description is where they can, you know, put some of those details.

KATIE

25:20 Just gonna put something in there. And then with the attachments, you can add photos and videos and whatnot, so there you guys are... and you can add as many, you know, attachments as you want to this. I'm just gonna go ahead and add that one. You're gonna select the severity, whether it's inoperable, or just efficient. You can tie it to the asset and then select, the status of new and that's gonna go into the office. And like she was saying, you can set it up for specific people to get notified when a deficiency is found, and then they would be able to quote it out that way.

CHRIS

26:11 Can we upload a form for them to fill out for quotes or?

LAUREN

26:16 Sure.

CHRIS

26:18 Okay.

LAUREN

26:18 What would, what would you have on that form that's not included in that efficiency workflow? That would show you?

CHRIS

26:25 The deficiency workflow look like, looked like it was just a notes tab, correct?

LAUREN

26:32 Kind of, I mean, you got like the pictures, a lot of people like we'll utilize the video or for the comment section to denote like what they want the estimator to know before quoting it?

--- Deficiencies ends ---

CHRIS

26:45 So, the other way besides going down the deficiency route, I believe you guys did show us, what the tech you showed us, what a tech would fill out to generate a quote that's what, our form does that right? Where they can lose quantities, this, the actual material, but it doesn't get, but it doesn't provide the sell price.

--- Quote templates ---

CHRIS

27:12 The...

CHRIS

27:13 Margins?

LAUREN

27:14 And...

CHRIS

27:15 That, I know that's why this was the other option because the way you guys what you showed us, when you utilize the quote from the file side, it is gonna also throw out our selling prices, okay?

CHRIS

27:31 What I do like about your guys quote rather than the deficiencies is because the deficiencies to pull over for the estimator, right? So the estimator needs a reference at and then type everything again.

--- *Deficiencies* ---

LAUREN

27:44 No, I absolutely will be visible to the user. In fact, when Katie documented that efficiency, I got an e-mail with a link to that efficiency. And if I click that link, it'll show me the pictures that she took, any of the other files, videos, whatnot, and then I can create a quote directly from that and include any other deficiencies that may have been found to it's.

--- *Deficiencies ends* ---

LAUREN

28:10 It's absolutely high to the quote and they don't have to re, key anything unless they need to clean up the test writing or whatever.

CHRIS

28:17 So it automatically populates on the quote... that information.

LAUREN

28:23 Yep.

CHRIS

28:25 Can you show us that?

LAUREN

28:28 Any?

KATIE

28:30 Yeah, from the office view?

CHRIS

28:32 Huh. Yeah.

KATIE

28:35 Let me... hop back to the office view.

--- *Deficiencies* ---

KATIE

28:41 All right. So, we were at temecula valley hospital, so we'll click into that and find that deficiency and then we can go ahead and quote it.

KATIE

28:53 So I would come down to deficiencies now, like she said, I can get it set up so that I get notifications, but there's also this way you can run reports on deficiencies.

--- Quote templates ---

KATIE

29:06 There's a bunch of different ways, to find it. So this is the deficiency that was found broken, please fix. And then I can just go ahead and add to quote here... put an expiration date on it just because and then create the quote.

KATIE

29:30 And then something that we talked about last time was applying the quote templates... so you can have different templates in here, pre populated for you guys, that you can just quickly add it's. Gonna pull over items that are typically associated with this type of repair. And then it's automatically gonna put that information in here for you.

CHRIS

30:02 Okay.

KATIE

30:03 So, yeah, all of this is pre populated and then you can see, the photo that I took... automatically pulled over as well.

--- ST app contracts and pricing ---

KATIE

30:16 And then you can always add edit, you know, if this ends up being 120 dollars, it's automatically gonna change that. If this is 170.

LAUREN

30:30 You need it, you need a different contract, whoever made that, the default contract on this account, I want to murder them because there's no pricing in that, pick a standard, pick a standard contract. Yeah, pick that one. There you go. So you have like your scaling mark ups and things like that.

--- Quote templates ---

KATIE

30:55 Yeah. And showing, the gross margins here and then here's where you can select the level of detail that you wanna share on the quote.

CHRIS

31:13 The way that let me understand this, the way that the quantity, the quantities and the hours pulled in was because you had a... preexisting information that you can pull from for that type of work... correct?

LAUREN

31:33 Like do you, do your estimators have like templates and things now?

CHRIS

31:37 No, no, because.

CHRIS

31:39 We work on way too many different types of equipment that, and the pricing changes all the time.

LAUREN

31:47 Sure. Yeah.

CHRIS

31:49 All right now these days, so now...

LAUREN

31:52 Yeah, we hear that a lot.

CHRIS

31:54 We get pricing from the vendors and we upload the vendor quote.

LAUREN

32:00 Yeah, that makes sense. So, since that's more common scenario for you for your estimated, like they would just kinda, they wouldn't start from a template, they would just kinda type in at the very top like the description or scope of work and they would have the information from the type documentation of the deficiency to include on this, including how long they think it'll take, you know, any other information that's relevant. And then the estimators can go in and build out, the parts and labor that would be needed to do the, do this work, whether it's a repair retrofit or a ti or whatever.

CHRIS

32:40 Yeah. The, the field tech would provide all that. They provide the quantity of all the material, the cost description, the scope of work, as well as the hours an estimator would utilize that information to the quote.

LAUREN

32:57 So, the text are the ones that input all the parts, the estimators just make it pretty and send it.

CHRIS

33:04 Yeah, yeah. Yeah.

LAUREN

33:06 Got it.

CHRIS

33:08 The text will contact the vendors e-mail their quote in with the vendor quote.

LAUREN

33:17 Yeah.

CHRIS

33:19 Function would be great because all basically our tech just under the hours, the quantity, all the information. The only part I don't like about it is if they upload the... well, that wouldn't be a mission, but, you know, the fact that they're able to see the soft pricing bars and how they don't see that. But that is.

LAUREN

33:43 Yeah... yeah. I understand that hesitation and give them that power fully. And like we talked about last week, I don't believe there's a way for them to have the ability to draft the quote without seeing the pricing. I guess with that in mind, this is such an important piece of your workflow. You know, do you think that might be a deal breaker for you or do you think there may be some kind of way around that between like how our deficiencies work?

--- Quote templates ---

CHRIS

34:18 The work around?

CHRIS

34:19 The description going through the description. But now, and that's what I'm saying. It's almost double entry because the tests are going to have to type all that information in which does pull over the quote, then the estimator will have to type all that in as well, right? From the description and type it into here. The nice thing about utilizing just the quote function for the text is they're entering all that information right over and they're dictating the just looking at a quick clean up for

the estimator and then down, you know. So, so yeah, I mean that is what we're looking for.

--- Quote templates ends ---

CHRIS

35:01 I mean, I can see where the utilizing the description as a workaround, I can see using both though because when our tech get busy, there are going to be times where, our estimator will have to do that.

LAUREN

35:18 Yeah. I mean based on what I'm seeing in the market, I don't see a world in which your text are going to get less busy, only more busy. So, what we've seen, I actually was talking with someone this morning who's, my rep down in Texas. He's saying he's got a customer there lining out the door to work for him because he prioritizes making it as easy as possible for the text and just doing admin to do all this stuff because the text are sort of like most rare resource right now, with the labor shortage. The more I see Chris your face use and like what I'm saying, but, we actually did a study about this that shows like, you know, if you add more admin to support your type, it actually kinda reduces the cost overall because the text are more productive in the field. And I know that's a hot issue, for a lot of people, but we actually have some data that supports that. Is, is actually a pretty strategic move to combat the labor shortage.

CHRIS

36:26 I agree. 100 percent agree with that, but you still got to pull that information out of the text because the admin person is not gonna know what's gonna be needed.

LAUREN

36:37 Yeah. That's why a lot of people are kind of trying to templatize more things, but, you know, there's like a training element of it too for the text like here's where you put it in. I like your suggestion of like a quote form. Like if you can get them to put in the exact information you need into a form that attend like attached to the work order, then the estimator can access that pretty easily. That might be another choice.

--- ST app contracts and pricing ---

CHRIS

37:03 Your, your quote is perfect. Just eliminate, the unit price, the tax and the amount, you know, basically they're...

CHRIS

37:14 The...

CHRIS

37:14 Quantities, the unit cost, and...

CHRIS

37:16 Yeah.

CHRIS

37:17 And done deal. And then when it gets to the office, then all that, you know, depending, I think if you guys, I mean, if the system has the capability for... upgrades, then eliminating that from the field. And based on the permissions, right? And the estimator has permission to see everything else. But basically from the field... the service line, the quantity and unit cost really that's all they need.

LAUREN

37:50 Yeah. Well, let's assume that is possible because I mean, there's some custom roles and permissions that we can ask about.

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

LAUREN

38:01 I don't know if it's exactly, you know, if it works like that exactly today, but it may be something, we can accommodate. Is there anything else the service trade team kind of aligned with what you're looking for?

CHRIS

38:15 Yeah. Like I said, there, I mean, this week work with this as well, so.

--- Customer engagement ---

LAUREN

38:20 Yeah.

CHRIS

38:21 You know, I'm just saying as far as future upgrades that would be great, whether or not work through the deficiencies or we give them access to see this information?

LAUREN

38:33 Yeah. That makes sense. That makes sense. The nice thing about the deficiencies is everything ties back into like the deficiencies its own record and service trade and that ties in to not just the job but then, the subsequent like work order that's created from the approved quote, whether it's like just a repair service work or like a project that ultimately ends up being a project like all that information kinda cascade and you have like that really Rich service history.

--- Customer engagement ends ---

LAUREN

39:05 But... let me do some digging. I'll let Katie kinda keep going with what she had planned and I'll see if there's any custom permissions, that we can create to accommodate that.

KATIE

39:19 Yeah, I think that's a good follow up item for us to see if it's you know, something that's been kicked around or where it's at.

--- Quote templates ---

KATIE

39:31 So this, I mean, this is pretty much what I had put together to show you in terms of, the quote and the quoting process. What other questions do you guys have on this?

CHRIS

39:50 As far as the quote, then once you go to... the quoting process done and turning it into an actual proposal that gets sent to the customer, that's just a built in template and press of a button and it displays.

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

KATIE

40:11 Yeah. So once all of this, you know, from the office, I'm looking at this and saying, yep, that looks good. Those look good. You know, everything's here. It would be this button that says send a customer and then you would be able to toggle everything on and off if I had multiple attachments and different things like that, and then you would be able, to send it to them that way and it would have, you know all of the details that you chose or did not choose to share as well as the files and attachments and, your terms and conditions.

CHRIS

40:51 Cool. You.

CHRIS

40:52 Said you said, the files that you choose to share or not share, so you could send save other documents in there that you choose not to share with the customer, correct?

KATIE

41:03 Correct. Yeah. So if I didn't want them to see that photo before I sent it, I would just toggle it off. And then you could also have it set up to where it is by default, none of them are checked. And then you could just toggle on the ones that you want to send to the customer. So, if you have some internal notes or internal videos, maybe the technician makes a video where they're explaining, hey, we need three of these five of those, and it is explaining all of that and it doesn't need to be sent to the

customer, but, it needs to be viewed by, the office, then they can just toggle, that specifically on and off.

--- Deficiencies ---

CHRIS

41:45 The photos that show up or any documents or photos that show up here under the attachment is what the technician has sent through... when he's closing out his job?

KATIE

42:01 That's correct? Yeah, this was, the one photo that I took when I was document the deficiency. So that's what?

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

CHRIS

42:10 Okay.

KATIE

42:12 Exactly.

CHRIS

42:13 Okay.

KATIE

42:16 Yeah. So if there were multiple, you could choose, to leave some of them and take some of them out and then also the message that you send over, you can customize this information as well.

CHRIS

42:32 Okay.

KATIE

42:35 So, and then that's again, what it would look like?

--- Forms ---

KATIE

42:50 With the...

CHRIS

42:57 Okay.

KATIE

42:59 How does that quoting process compared to what you guys are doing today?

CHRIS

43:08 Yeah. Our techs are filling out a PDF form with that information where they would type in the deficiencies and then they would put together a list, how many hours... and material. So they gather that information on a PDF and send it in. Then, our estimator will take that information, and build the quote.

--- Forms ends ---

KATIE

43:36 Okay. Just build it based off of whatever, the technician included on that PDF.

CHRIS

43:44 Yeah. Okay.

KATIE

43:46 And where are they getting those prices from, for everything? Is that in like an excel sheet or something?

CHRIS

43:52 We have pricing in the system too. Okay?

KATIE

43:58 Perfect. And then for, as they are sending it out to the customer, what does that process look like? Is that all done within the?

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

CHRIS

44:09 E-mail with our, it's our another PDF PDF. We taking in?

CHRIS

44:21 How do you?

KATIE

44:22 Think your customers would react to getting something online that has, you know, all?

CHRIS

44:28 Be a positive or negative because our customers, you know, how customers they don't like to change sometimes and... I mean, if it's opening it up, they'll just have to

get used to it, but it's I don't know how they'll react to it. Some of them will like it, some of will not like it.

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

KATIE

44:47 Yeah.

LAUREN

44:48 Yeah.

KATIE

44:49 There's always a mix.

KATIE

44:55 Okay. Well, any other questions around this or anything else that I could show you that you guys kind of had as question marks after our last meeting?

CHRIS

45:05 No, I'm good. Unless you had anything?

CHRIS

45:12 I'd like to see in the.

CHRIS

45:15 Process from the field?

CHRIS

45:18 I know we did the efficiency and then looked at the internal coding process, but I'd like to see the recording process from what the hell, the with you? Yeah.

KATIE

45:33 Let me pull that up for you. Cool.

--- *Access to information* ---

KATIE

45:48 Right. Are you guys seeing my phone here?

CHRIS

45:51 Yes.

KATIE

45:52 It's a little delayed. Sorry. Yeah. So this is, the app, the technician app. If you, if they click on this three lines, the little hamburger up here, there is here, add a quote.

CHRIS

46:10 Okay.

KATIE

46:11 That they can click on. And I think I did the black hock museum, so they can just type it in here.

--- *Quote templates* ---

KATIE

46:20 And then they would select the job type much like you would do from the back office. So, let's say that it was preventative maintenance and then it would tie it to, the contract. So... we'll just put it in a standard contract and go ahead and save that. So it's pretty similar to, the workflow of the office view. It's just all done here on the phone so they can see the same information here, the teas and sees and whatnot...

LAUREN

46:58 Since there's no template that you guys are using currently for like different types of things like, they could access the template if it was something they saw commonly and you have templates otherwise under the quote description, they would go in and put the scope of work that's where they can include sort of what they need to be doing, this would be customer facing and the estimator cleanup back in the office. Okay? And then under the service part... do you have a efficiency for this location?

--- *Deficiencies* ---

KATIE

47:37 I thought I did.

LAUREN

47:40 You may not. If, if she had a deficiency where it says add service, there would also be the option to add. The deficiency is the problem that they identify and they, that the service and see what your options are. Yeah, I don't see the ability to do the service. Maybe just a like a template or something type quarterly.

--- *Quote templates* ---

CHRIS

48:07 I...

LAUREN

48:12 Yeah, one of those... and then save it.

CHRIS

48:18 Yeah, I just.

LAUREN

48:20 This one does include partly burn items, but again, like if you didn't have that, they would be able to scroll down to that item section, put the back button the, and then right there under part on items that's where they'd be also able to add the time like, they knew it take eight hours. They could go in an eight hours. If they knew they were gonna need like 410 re, they can type that in there as well. And it would pull from like your master part is.

CHRIS

48:52 Okay. And, they could add as many items as they want.

LAUREN

48:59 Correct.

CHRIS

48:59 What about some contractors?

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

LAUREN

49:03 Like, if you need into subcontract something for somebody else?

CHRIS

49:08 Like.

LAUREN

49:09 A contract... like a fee for what the contract is gonna. Is that what you're asking?

CHRIS

49:19 Yeah, just like adding a line item of material, adding a subcontractor which is our guys even get electrician out or plumber or brain.

LAUREN

49:32 Yeah. You could do that and like have that as a line item. The other nice thing about service trade and this is actually a peek. And so like the origin of service trade, our platform allows you to sub contract work from your ServiceTrade account to your sub contractor.

LAUREN

49:53 So if they also have a service trade account, you can create a work order in service trade and actually send it to the electrician who might be doing that work. If they're all. So the ServiceTrade and you can kinda track the electricians completion of that work. But for these purposes, all you would really need to do is like have that like a electrician, you know, see the line item.

--- Quoting ---

LAUREN

50:15 And again, the estimator could clean that up. And then they'd be able to drop the quote and the estimator could review those drafts and send them to the customer in bulk customer. Rather.

LAUREN

50:32 I think we're now on an appointment somehow into the quote, but did we answer your question, on how the fields quoting work?

--- Tech On-site ---

KATIE

50:41 Yeah.

KATIE

50:47 Any other questions with like, the mobile app while I'm in here?

CHRIS

50:51 Hey, there.

CHRIS

50:57 Yeah, just go back there. I didn't have any, the last time you covered it, but just double checking. So... you scroll down.

CHRIS

51:07 Yeah, I...

KATIE

51:15 And we have those different clock events down here so you can swipe through, the job prep, the in route notifications and then also onsite... and they...

CHRIS

51:28 Those things down at the bottom right there. If you scroll down, are those, is there an option to add or remove any of those? The pre work authorization? Because I see generate invoice. Can that be removed off of that?

LAUREN

51:46 Yeah, that's actually the only one that can be removed?

--- Tech On-site ends ---

CHRIS

51:50 Okay.

LAUREN

51:52 Yeah, that's a permission based setting. I believe, you're gonna hate this. I believe if you give, the ability to quote in the field, it may also give them the ability to invoice. I could, but again, that, I can check on that, I've got like a threat going with my sales engineers. But, if you give them the ability to do the field quoting, they may also have the ability to do the invoicing.

CHRIS

52:26 Yeah, we would want that, we never have our text invoice.

LAUREN

52:32 Yeah. I believe that is the case for probably 95 percent of the people we work with. So we just have it turned on because we have admin.

CHRIS

52:43 Or...

KATIE

52:44 We'll...

LAUREN

52:45 We'll check and see if that can be removed while still, holding on to the ability to the field.

CHRIS

52:52 A...

KATIE

52:59 Was that another question? Sorry?

CHRIS

53:02 No, yeah, he was just, okay. Yeah, we wouldn't want that on there. Yeah.

LAUREN

53:08 Okay. Yeah.

CHRIS

53:09 Okay. I...

KATIE

53:10 It, yeah, the app, is pretty simple by design but still, you know, they can get a lot of information if they want to expanded out, but they'll have a pretty clear idea of what they're there, to perform and then, you know, if something is broken, they can always go back and see past efficiencies again if they need to, it's not going to be hitting them over the head with it, but if they do need that information, it's there for them?

KATIE

53:51 Any other questions with that? Does that answer your question for, the quoting in the field Joey?

CHRIS

53:59 Yes.

KATIE

53:59 Okay. Perfect. Well, what other questions can we help address for you guys?

CHRIS

54:09 Okay. Can we see the agenda one more time that you had?

KATIE

54:12 Sir. Yeah. Let me.

CHRIS

54:14 Let me see that. I know we wanted to hit the maintenance and check out that some more of the quoting in detail which.

--- *Recurring maintenance* ---

KATIE

54:22 I am not sharing my screen. Sorry. Okay. Yeah. So that's the agenda that I had put together. So we went over different visits and different services, setting up frequencies for new services as well as, the quoting information from both the office and the field. Is there anything else though that's kinda come up as we've been talking before, we kinda dive into some of the pricing.

CHRIS

54:59 I think we covered that. Those are the two things, we were needing, to see and wanted to know about. So, we can go over pricing if you're good with that, Joey? Yup. Yeah.

KATIE

55:12 Okay. So, I know we gave you kind of a range last time, but I went ahead and pulled together some more exact pricing. So basically what we have here is broken out by line item. I know we talked about doing two Northboundary users. Our, our minimum is usually five, but I was able to get them down to three instead of two. So, so we added three users of Northboundary, which is, the pre somebody as a customer, the sales tool.

--- Parts management (inventory) ---

KATIE

55:49 And then 16 licenses of service trade. I put in partsledger. I know that we're still kinda up in the air on, if you guys would utilize that with our parts in inventory tracking and management or if you guys would do that through CE or, you know, we're a little bit up in the air on that, but I wanted to put it in there just so that you guys had, an idea of the full scope of what the licensing would look like.

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

CHRIS

56:21 Okay.

--- Pricing ---

CHRIS

56:29 Okay. So the 16 users are the field technicians, the internal staff.

KATIE

56:35 They're all included. Yeah, you can have as many as you guys need.

CHRIS

56:41 And I can see meeting. I think you're thinking about that a little more of a brown boundary. We would have one, two... three. We would probably end up at five five.

--- ST app contracts and pricing ---

KATIE

CHRIS

57:00 Yeah. So I would just change. This would be the per person rate. So, this would just change.

CHRIS

57:07 Okay.

KATIE

57:08 So this?

LAUREN

57:08 Are you, are you guys accounting for project proposals as well? Like a new project is mark boundary also just project proposals, not just meeting a great.

CHRIS

57:22 But I'm not.

--- Accounting integrations ---

LAUREN

57:29 Just just something to think about. We can dive deeper into that if we need to. Okay? But yeah, mainly, we use it for selling like service agreements that they did of this project.

CHRIS

57:43 As well.

KATIE

57:47 Yeah. And I know we haven't gone over, the connector but we do have quite a few customers using Computerease and I think that it would probably make sense for a future conversation with like we talked about earlier, Joey with your controller and then Tonia from our end to just go over what the connector looks like. But we do have, a good amount of customers that are running on it right now.

--- Pricing ---

CHRIS

58:14 All right. Sounds good. So basically, if we have the two other users, we'd be looking somewhere around 62,000, 500 or so roughly.

KATIE

58:25 Yeah. Okay. So this would be, the subscription piece, and then we also do have the implementation and the, this is like the one time services fees which will change based on, you know, who's doing the implementation of, the connector and different things like that.

KATIE

58:51 But just to give you some initial kind of ballpark figures, I went ahead and included that as well. So this would be like the one time fee, of having our team come in and scrub the data, and get it imported into service trade and setting up those initial frequencies, of the customers that you guys have currently.

CHRIS

59:15 All the data information, the setup, do you guys handle all that as far as like getting it set up in the system or is that something we, yeah.

KATIE

59:26 Would work with your team? We have an implementation team. So it would probably be a situation where you guys decided who was gonna run it from your end, of getting the data together. And, you know, working with our team, but you would have at least two individuals that you were working with on a weekly basis of, you know, getting the data scrubbed and getting it in the format that service trade can accept, and all of, that good stuff. But we do have our implementation team in house that are actual service trade employees.

--- Forms ---

CHRIS

1:00:03 Okay. And what about like custom reports? Is that something we send over to you guys? And you guys build the report for the system? Or are we, how do you guys deal with that or do you guys train us on how to do it? And we?

LAUREN

1:00:17 The...

CHRIS

1:00:17 Media.

LAUREN

1:00:18 I mean, we can do either, what kind of reports do you have? That will give me a better idea of what to recommend?

KATIE

1:00:25 So just.

CHRIS

1:00:26 You guys may have already some, I mean it's job costing profitability report, open po report.

CHRIS

1:00:33 With report?

LAUREN

1:00:35 That's different than what I thought, you meant, okay, when you said report, I was thinking like forms you wanted to check, to fill out.

--- Forms ends ---

LAUREN

1:00:44 Well, the same applies, right? So, so we can create custom reports for you or we can train you how to do it. You get some already with trip report. Definitely one of them, we have a lot of profitability for us come with the enterprise subscription. And if you have reports that are maybe more meaningful to you than others of our customers, like one that immediately comes to mind is like tech.

CHRIS

1:01:13 Quoting...

KATIE

1:01:13 Like.

LAUREN

1:01:13 How are they doing with what they're proposing versus what we're delivering like that's? Probably not something a lot of our customers would look and see if we can either teach you how to create those reports or create them for you or like.

--- Forms ---

CHRIS

1:01:33 So, is there a fee, for any forms that we're sending your, you know, needing to get done that aren't already a, you know, a standard in your standard forms that you guys already have or templates that you already have?

LAUREN

1:01:49 Yeah. So like if you had like a one situation, we see a lot is like maybe you have a customer that requires like a specific like maintenance checklist form that needs like a web signature or whatever those to get those into service trade, we can either show you how to do it like create it as a sale PDF and like assign the role in service trade or we can do it for 149 a page like a one time?

CHRIS

1:02:15 A 49 page. You said? Okay.

LAUREN

1:02:19 Yeah. So... you have a lot of situations like that?

CHRIS

1:02:29 No, no, I just, you know, we haven't you know... since computer is we haven't implemented any other system. So just, I know what?

LAUREN

1:02:45 But...

CHRIS

1:02:46 You know, the list of funds that we have, I don't know if that's something we already have that would match ours or we might possibly be needing some to get created, whether it's a form of a report.

--- Purchase decision ---

CHRIS

1:02:56 So just for our own information on, you know, so we know what kind of costs we'd be looking at if we needed forms to be done.

LAUREN

1:03:06 Yeah, yeah. We can always scope that out too. I know Katie mentioned, that you all are looking to kinda pull the trigger on something sometime next year once you've, had a chance to kinda get everything, we'll have plenty of time to kinda do some exploration. And so like the forms and everything if you decide that service traits ultimate.

KATIE

1:03:28 In the direction you wanna.

LAUREN

1:03:29 Go. So we can get a list of.

KATIE

1:03:32 Really?

LAUREN

1:03:32 Firm understanding of like the total implementation, that will need to apply to this order to make sure that you have everything that you need. And then, so.

CHRIS

1:03:43 Okay.

CHRIS

1:03:49 You have anything? No, good from here?

--- Accounting integrations ---

LAUREN

1:03:53 I'm interested to know what I'm gonna put your, her name meta, how do you say media, and Eric, what they said about ServiceTrade, what their thoughts were?

CHRIS

1:04:13 They, I mean, they liked it. They thought, you know, there was definitely some benefits to.

CHRIS

1:04:20 To the system.

CHRIS

1:04:22 Currently, with what we're dealing with now, obviously, we have a lot of, with the system we're utilizing now being an older system, there were things obviously, we didn't provide them or out of the new system because we felt like, our current... web based the field side of it which it's called fields for computer.

--- Access to information ---

CHRIS

1:04:47 These, it's a web based what our tech would log on. There's a problem with what again, like you can see how we're asking, hey, can this be removed? Can that we things on the on fill these that we don't have a lot of customizations to work?

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

CHRIS

1:05:06 So we don't like what it has. We don't want the text working on that or having some information or being able to press that button to send because we do with that too. There's a button for them to invoice the customer and go right to our customer. The customer's e-mail and that's a big no, no for us like.

--- Paper process ---

LAUREN

1:05:22 Yeah.

CHRIS

1:05:23 It actually does. That just causes, you know, we don't know what they put. It hasn't been reviewed. And then it gets kicked out. So there's just some things we didn't utilize. So there's unfortunately, that hinders the information passing to the

field back in from the field that our, you know, our team doesn't have that flow and that data just dropping in for them.

--- Forms ---

CHRIS

1:05:44 There's you heard us. There's a lot of PDF that our tech filled out then that information trans over and manually entered on another form. So, you know... just looking into other systems such as ServiceTrade. They, you know, they know, it's a lot better than, what they're dealing with. So, they liked what they saw the.

--- Forms ends ---

CHRIS

1:06:09 They were okay with it.

CHRIS

1:06:12 And Eric, you know, he was interested in like what he saw too. He's been with us a little over a year, so he's just getting used to our system. He's not very familiar with, you know, looking at what you guys got and how much that would provide his team as far as efficiency and productivity. But he's smart enough. You got a good idea of what he's currently looking at and how your ServiceTrade, so they had on feedback.

LAUREN

1:06:45 Gotcha. What what if anything other than like the quote permissions, are you all unsure of in regards to service rating the right fit for you?

CHRIS

1:06:55 I think joy and I, we both discussed as far as the quote part of it, you talk about what the tech puts together. Yeah. Right. Yeah, you know, for us like having the numbers out there one again, they don't need to see that and it just again, it just causes, you know, we get a lot of chatter from the guys, you know, that we don't need them thinking about that or seeing those numbers.

--- Quote templates ---

CHRIS

1:07:21 We just want to focus on the cost generating the quote, putting their quantities materials, their scope in there. I know that's you know, if that's something you guys eliminate that's great. We don't that's also, you mentioned that generate invoice, how it's tied into that, you know, that we don't because we're not gonna, we don't want that on.

LAUREN

1:07:45 Right.

CHRIS

1:07:46 We don't want them to have access to... other than that. I think, you know, what you show us as far as putting the quote together that's what we'd expect software to do, being able to, for tech in the field, type up what the repairs would be put in, the number of hours, whether it's over time or straight time and put in the material, any subcontractors we might have need out there and electrician or something like that, them to build that in and it goes right in here and it's already filled out for our quote.

--- Quote templates ends ---

CHRIS

1:08:18 We just get someone to review it, you know, and get that generated. So... that work around is not, you know, that can be fixed. We don't want to because it's gonna be done work if we do the other.

CHRIS

1:08:31 Route they.

CHRIS

1:08:32 Have to right, wipe it out because our estimator, like you mentioned, we don't have templates, right?

--- Quote templates ---

CHRIS

1:08:38 We don't have templates for the service and repairs out there. It's just, I can foresee it. It's gonna take a lot of work to get that created. We could possibly do that in the future, but I'm seeing that probably a few years from now to get, be able to write up, you know, different equipment, what the type of repairs, what material, it would need and labor hours for that type of apparel, all the different types of equipment.

--- Paper process ---

CHRIS

1:09:07 So for us not being there and having that yet, it's a lot of double work for because our estimator, you know, we're hiring, you know, has some knowledge, wasn't a field worker. So he's taking what they need to put it in the system. He relies on their knowledge to tell them what kind of parts, you know, what the quantities are, how many hours.

--- Paper process ends ---

CHRIS

1:09:28 So it's double entry for us. If our tech has to ride in that, then he has to go in and build the quote and put all the numbers in kind of that's what we're doing. Now,

you know, working every day. So we have a full time guy doing that shows you how much quotes. And I know a system like this could cut it down for him to where we can have them working on other things that are productive which the system will generate that, you know, the efficiency and the productivity to where, we can get our team to start working on other productive improvements that the department would need.

LAUREN

1:10:10 Yeah. I mean to your point, having an estimator who's not doesn't come from the field is like the exact reason why people do create templates. The nice thing is that one of one of our vision for using AI to kind of make service management easier for contractors is, you know, we've got 1,300 customers who are servicing the same types of equipment day in, day out and eventually like we can use AI to kind of build out templates. So you don't have to do it, right? If that's an initiative for you in a few years, like our goal is to make it. So you don't even have to go through the exercise like, here's, what people usually will, you know, put as a type of work for this type of repair kind of thing. So that's kind of how we see like the features trade, kinda relating, you know, making make because, you know, as people are aging out of, you know, the trade that transfer knowledge is becoming harder. So people are having to get scrappy about how they, you know, perform their business perform that work.

CHRIS

1:11:25 Right.

LAUREN

1:11:26 And that goes for the technician side as well as the admin side of things. But I digress, I had some things I wanted to say but I lost it because you got me excited about I.

CHRIS

1:11:41 We're...

LAUREN

1:11:44 We're pretty excited about this, Jeff, and we're excited to see the action to.

CHRIS

1:11:49 Yeah.

LAUREN

1:11:51 Gosh, what, I did get a ping from my sales engineering team. They're working on seeing if we have that permission for quote, and such, other than that, what else? What else about ServiceTrade? Are you sure that it might be three? Is there anything else outstanding?

CHRIS

1:12:15 There was nothing that stuck out to me.

CHRIS

1:12:17 I mean, you know, that... just that that's why we, you know, the quoting process was big for us... just amount of, I mean, you know, in this trade how many quotes our guys are putting out a day and turning that around and getting that out to the customer as quickly as possible and to generate that work back in, right?

CHRIS

1:12:45 So ongoing... that's an important part of that we're looking to have and drive our efficiency and just get that turnaround going quickly because that's a, so what we have and our account managers, it's a lengthy and time consuming process for our account managers. You know, if they even had the quotes turned in from the text every day right now, our current process, it's a lot for our account managers to do.

CHRIS

1:13:17 So, you know, our account managers, we're looking to give them something that flows right in from the field and it's the information there. You know, account managers will love that because right now they put in a lot of work... through the estimator to here and then the transfer from the estimate to the proposal, what the customer gets, not so much for customers receiving it, but placing the quote information onto an actual proposal that gets sent out to them because that's a bit time consuming for us too.

CHRIS

1:13:54 So all three of those things, how the tech gets, it builds the field quote and how it transfers onto an estimate right into a proposal. So those are things like right now, those are the only two things that I see that our question marks for myself because we want, our field tech to be able to quote build a quote from the, and it come in already on a quote just needs to get reviewed and then generate that proposal to get it out.

CHRIS

1:14:30 Customers. So.

LAUREN

1:14:32 Yeah. I think based on what I'm seeing and this chatter that we'll be able to kind of figure out some kind of solution. So we'll keep you posted on that. What, what sort of the decision process from here? I know we probably still have some

outstanding computer questions and things like that. But, what other, you know, things do we need to check off to, you know, for you to feel comfortable that this is the right solution for you?

CHRIS

1:15:00 Well, so the next part is obviously, if we move forward with at still got to figure out what we're gonna do with our project team. So.

--- *Accounting integrations* ---

LAUREN

1:15:11 Okay.

CHRIS

1:15:12 The more we look into things, I don't know if really sticking with computers is the right long term goal for us.

LAUREN

1:15:23 Probably not. Yeah.

CHRIS

1:15:25 Now, so it's an older account ERP system, so, which we have that in place. So what I need to do is I need to figure out what are those costs? What are we paying annually with computer? Is the date is... been acquiring other companies. So meeting with a pro core is gonna be something that we've already started the process for, but I've got to look at the total cost between computers pro core and you guys because it's gonna take all three systems, right? And you can see why I wanted, we were looking for a all in one system where.

LAUREN

1:16:10 Yeah.

CHRIS

1:16:12 Computer service software project platform and right? So.

LAUREN

1:16:20 What did you think of build up? And they're pretty strong.

CHRIS

1:16:24 I, I'm gonna be honest. It's probably, I think it's kinda leading. I think they're our head of a lot of what we're seeing with anybody right now, you, what you guys offer on the server side, I think is pretty much real close neck and neck. But I think where they're pulling away is some of the quoting features that they have. Awesome. They, they have exactly what we're looking for. On the clothing side. Also looking at the full CRM, they've got a CRM which is comparable to yours. And I think they just

added that on this past year. We met with them a year ago. We thought their service for service platform was pretty strong... and I think we really like, the dispatch board which is comparable is trade. At the time they had a maintenance package, it wasn't the CRM that they're using right now, but you guys didn't have Northboundary in your year either.

--- *Accounting integrations ends* ---

CHRIS

1:17:29 So I don't remember the quoting side with you guys. But over the past year, you guys both BuildOps and service triggered added on quite a bit back talking to both of you. But in my opinion, where they're really pulling away is the product side they have.

LAUREN

1:17:50 Yeah.

CHRIS

1:17:51 The piece that I didn't even, I told them when we started meeting with them, I said, look, I don't I'm to be quite honest, I'm not even worried about the project side because at this point, I've just come, I just finally come to grips with, I'm gonna have... accounting system with the Bolton project side and Bolton service side, right? But going through everything on the service side which is pretty much has everything we're looking for. And then they went through the project, and like, wow, maybe we won't need to go somewhere else. So they do have, they do have that wrapped up.

--- *Accounting integrations* ---

CHRIS

1:18:32 And from a pipe price point... it is for you guys a little different. So so that would be one of the downfalls too is I gotta figure out what project piece I'm adding onto it and take the three and Adam up right? Where we build up. I can probably either keep computers or we can go and utilize the different accounting software like Sage or Quickbooks or something like that. Gonna be a lot less cost. So.

--- *Type of work* ---

LAUREN

1:19:08 You're thinking, our project stuff is a little bit more lightweight than what your Construction in.

CHRIS

1:19:14 Yeah. I think they're a little more geared towards, the heavier Construction... shop drawings as built have our fill having access to the drawings once we upload them or if logs change orders, daily logs. I mean it's it pretty much it pretty much has everything that pro core offers as well.

LAUREN

1:19:46 Yeah. I know they had, I mean, I projects is a really important piece for you. That sounds like an easy choice. And then they've hired a bunch of things from pro core. So they've got real heavy project Ma into their organization where we Bill, we stand apart is really the customer experience like helping you sell more, deliver on that in the customer experience.

--- ST app contracts and pricing ---

LAUREN

1:20:11 Really. I think the choice that you have to make is, which is more important, you know, the project operations or like the customer and you may be able to have the with either. But, we never designed our project management functionality to be like true like DC Aia type project stuff or just more like direct to our Progress billing thing.

--- Purchase decision ---

LAUREN

1:20:35 So... then we understand if that kinda takes us out of the running, we just want to be mindful of how we're spending our time.

CHRIS

1:20:43 Yeah. And, and to be honest after our first...

CHRIS

1:20:45 It was like I'm in with you guys. It was.

CHRIS

1:20:49 Yeah, everything.

CHRIS

1:20:50 Looking for on the, you know, from a service perspective because again, I was pretty much looking at the fact that we were gonna be going another direction on the project side.

--- Purchase decision ends ---

CHRIS

1:21:02 Like I said, I think pro core is gonna be a good option. And being that tech already partnered with pro, and we're good on the computer... I was thinking we pretty okay. Well, everything looks good. I think you guys service trade has everything we're looking for. But after meeting with BuildOps and seeing all the

upgrades I've done over the past year with the project side that's what kinda was like shoot.

CHRIS

1:21:36 Yeah, I like, that honestly they.

CHRIS

1:21:40 They traveled in from, I think they're back.

CHRIS

1:21:45 One, yeah, one, one, one just drove out from santa Monica because here, the other one flew in from Colorado, the common I have for...

CHRIS

1:21:55 Chris Monday evening last week after we met with you guys. I was like, why are these guys flying in? Maybe that, you know, I felt bad. I was like, yeah, they may be wasting their time.

CHRIS

1:22:06 That's what he said. He told me. He said they're wasting their time. I said honestly to have a project, we didn't expect. We're we're thinking we were looking at their service, right? We're we're bringing them in to like a how's their BuildOps compared to yours gonna work for our service department. And then when they, he's like we got projects now and he went to the projects honestly. It was surprising how far they come in 10 months. I think we met with them, but we didn't expect that. And Joey's being honest about why are they coming over here? Because we walked away from service trains. Okay? That's that's what we need to provide our team, right? Because... the real being realistic coming from what we're looking at with spectrum and we were trying to go through the all in one. We were coming with grips like, okay, we just got to do an add on. We maybe we just go for now on because it seems like these add on that are dedicated to just improving your service department and giving you the service functions that you need that's where you guys are focused on. And it shows, your service trade is right there with BuildOps in that. But for them to have all that we were like, no, like, okay, well, that look good. Maybe we don't have to find have different type of software, three different softwares here. But yeah, I mean.

CHRIS

1:23:51 That's pretty much a year ago why I made the decision to go with spectrum but... that, that's even once we got into it, it's pretty clunky and it was not as user friendly as we were hoping.

--- Access to information ---

CHRIS

1:24:06 Not like yours or BuildOps. So you're the way you guys are able to navigate. And the information you have just seems so much really easy for our admin in the office to navigate through spectrum was not like that. It was like, no.

CHRIS

1:24:22 It was, yeah, not as strong, but I mean...

CHRIS

1:24:26 Another thing too.

CHRIS

1:24:27 Is, I mean we've had a couple of hours with you guys last week, another couple of hours BuildOps came in and they spent a whole day here. They came in first thing in the morning and they didn't leave until four 30 in the evening and what was night, which was nice because of the fact we're able to dive deep into every.

--- Tech time tracking ---

LAUREN

1:24:45 Yeah.

CHRIS

1:24:46 These platforms, we were kicking ourselves. We thought we spent a lot of time with spectrum and no, there is just, we spent so much time with so many different companies going through, but you're only gonna pick up so much in a couple of hours, you know, after, you know, two two hour demo. I'm still I...

--- Purchase decision ---

CHRIS

1:25:08 I told...

CHRIS

1:25:09 BuildOps, I said, look, I'm still thinking we're talking about whoever we make the decision. All right? This is the direction we're looking to go. I told them I said.

CHRIS

1:25:19 Probably still looking.

CHRIS

1:25:19 At about anywhere from 30 to 40 hours of your time before I sign anything because that's how deep I want to get into the system knowing that we've seen everything. We understand what we're getting into. We didn't do that when we move forward with spectrum. And that was a downfall because we found that is just not right for us. So, so I'm just being, you know, transparent.

CHRIS

1:25:49 You know, I didn't cancel this meeting.

CHRIS

1:25:50 With you guys today because I wanted to see, was there anything that you guys have on the maintenance piece or even, the quoting that maybe BuildOps didn't have, but you guys, I think on the service side, you guys are pretty much neck and neck to be honest if it wasn't for the project side on.

CHRIS

1:26:11 And the little stuff?

CHRIS

1:26:13 Quoting whatever past that, you know, I would tell you guys, both the companies are pretty much neck and neck.

LAUREN

1:26:24 Yeah.

CHRIS

1:26:25 The functionality, the ease of use and how I will have our teams working. I think you guys are both right there.

LAUREN

1:26:36 Yeah. Well, it sounds like they made your decision pretty easy then to pick another all on one.

CHRIS

1:26:46 What?

CHRIS

1:26:47 It wasn't what we're looking at, but I, we didn't expect that. So there's still more.

CHRIS

1:26:52 We need to see.

CHRIS

1:26:53 So, I haven't made the decision.

CHRIS

1:26:55 Yeah.

CHRIS

1:26:56 Now, is there anything I've seen today?

CHRIS

1:26:58 That's gonna make me go back and build up, no, not at this point, but like I said, they got another 40 hours of diving deep into stuff with... make sure this is the direction. So, although we do plan on moving forward to dive deeper into their system... I don't believe I'll be making a decision until the end, right? At the end of the year or the beginning of... you know, 24 because of the time that we spend. So.

--- Accounting integrations ---

LAUREN

1:27:36 Yeah.

CHRIS

1:27:36 We don't we don't they cover the basics of the project side. We don't we still need to dive in and be like, does it have everything they're saying it has? I mean, because they went through the day they spent with us, they go deep in service deep in the maintenance side of it, how they're building the maintenance contract scheduling, you know, the, or they went into how we're generating invoices out of the service POS, and how that ties into Google or current system as a data dump.

--- Accounting integrations ends ---

CHRIS

1:28:09 They started. So you can see there was a lot of information that we were going through before. Then when we hit the project side towards the end of the day, they showed us what they have, but we didn't dive like we dive into the service. And everything I just mentioned, we didn't dive into that. They showed us. We don't know, okay, by diving in, we may, if it doesn't work, we find out, yeah, you guys aren't there yet. We know you just started it. It's not where we wanna be.

LAUREN

1:28:38 I don't...

CHRIS

1:28:39 Know if that's gonna work for us, that's why we need to meet with them and look at the project side because they really spent a lot of time on the service, which what we wanted showed us what it can do.

--- Accounting integrations ---

CHRIS

1:28:50 And again, I agree with Joey, it's to me it would be a coin task because I can't say yours is much better than their service. It's you guys do the same thing and you

guys do it. Wow. From what I see, you guys both do service very well. So, it's just us diving into the project and see if that does work because that would save us, you know, operating these different softwares. We'd love to just use one if we're only using Quickbooks or Sage to move our accounting into. And we have one that covers our project and service side that's awesome. That's great. It's...

--- Accounting integrations ends ---

CHRIS

1:29:32 Have the whole company working within one system?

LAUREN

1:29:36 Yeah, for sure. I would say, I would say, I don't in the build up task as the 30 to 48 hours of showing you and I wish them luck. I would, word of advice. I would ask them for references that have been using several years. But the service and project because, like you mentioned, you know, that's a lot to have achieved in a year and software doesn't generally develop that quickly. We've been able to be agile because of, our acquisitions, and I don't know that they've had any acquisitions but that I'm aware of.

--- Purchase decision ---

LAUREN

1:30:21 I could be wrong, but, I do, think I do think service rate everything you see is everything that you get and we'll be honest with you to fall. So we'll circle back with you on the quoting stuff because it does sound like that may be of interest. But at this point, considering how important the project management seems to be and keeping everything in one system, it sounds like it sounds like you have a pretty easy choice.

--- Purchase decision ends ---

CHRIS

1:30:47 Yeah, yeah. So.

CHRIS

1:30:49 We'll definitely stay.

CHRIS

1:30:50 In touch and let you guys know how it goes. But I mean, we're our next step with them is.

CHRIS

1:30:58 All right. Let's build a test company and I want them to, I want them to show us what.

CHRIS

1:31:03 To create a customer, create a vendor, create, our employees in the system because our team is gonna be.

CHRIS

1:31:10 No, it's all good when you're...

CHRIS

1:31:11 Looking at a fully built system with your guy's information in there, but I wanna know how difficult is it for our team to create new customers, new vendors, new create employees in the system. And after building several of that, several of those that creating jobs and let's start now creating. So I will basically starting from scratch and start building that's why I'm saying it's...

CHRIS

1:31:38 The one our business, it's gonna take.

CHRIS

1:31:39 A good 30 to 40 hours of our time that's about how deep we got into surface trade. When we blew it up, we broke it. So.

LAUREN

1:31:46 No.

CHRIS

1:31:48 So that's I mean, making that kind of a new investment when you're talking, I'm sorry?

--- *Pricing* ---

CHRIS

1:31:55 You...

CHRIS

1:32:00 Spectrum. Yeah. So, but yeah, getting that deep into it is what it's gonna require. And, you know, when you're spending, you know, an upwards of 60,000 dollars a year, yeah, we need to spend the time to make sure that the system is gonna work properly for us. Yeah.

--- *Pricing ends* ---

KATIE

1:32:20 Yeah, absolutely. Well, like Lauren said, well, we have a couple of follow up items that we can get over to you guys. And then as those conversations Progress, if anything changes, we'll keep in touch and just happy to provide what we can provide from our end.

CHRIS

1:32:41 Okay.

KATIE

1:32:42 I appreciate you guys time today. I'll give you back about 30 minutes here, but we'll follow up with you, and be in contact.

CHRIS

1:32:51 Okay, Katie, Lauren. Thank you.

KATIE

1:32:53 Thanks.

LAUREN

1:32:54 Guys. Good luck.

KATIE

1:32:56 Thanks.

CHRIS

1:32:56 For coming out here too. I appreciate it. Yeah, no, thank you.

LAUREN

1:33:00 Hey, point of border. I would have spent all day if I didn't have to pump. I didn't think... you know, because I'm a nursing mother.

CHRIS

1:33:11 Yeah, I know.

LAUREN

1:33:15 I feel slightly discriminate against what I don't work for you. So it's a.

CHRIS

1:33:21 Your time on, he was appreciated. You appreciate it. Thank you.

KATIE

1:33:27 Happy to.

CHRIS

1:33:28 You bye.

LAUREN

1:33:29 Bye.

The End