ServiceTrade Demo with Kline Electric

Jennifer Nguyen with Kline Electric
Recorded on 6/24/22 via Zoom, 1 hour 0 min.

Participants

SERVICETRADE

Jennifer Nguyen
Territory Manager

Chuck Dunham
Field Manager

Billy Dicken
Territory Manager

KLINE ELECTRIC

Chris Titus
Business Development Manager

OTHER

Topics

Transcript

--- Call Setup ---

CHUCK

0:00 Hi, can you hear me?

JENNIFER

0:01 Yes. Hi.

CHRIS

0:05 Yes. How's it going?

JENNIFER

0:08 Good. What about you?

CHRIS

0:10 Not too bad. I'm just glad it's Friday survive the week?

JENNIFER

0:14 Yeah. Me too. Is the other person currently, Trish?

CHRIS

0:20 I am not, I don't think she's gonna make it today, but I just wanted to send the invites were just in case.

JENNIFER

0:27 Okay, awesome. So let's just do, let's just get started. My name is Jennifer and I'm the in sales inside sales manager for the midwest area, and this is my counterpart Chuck who handles like bounce line.

CHUCK

0:44 Hi, Chris. Nice to meet you. Nice to meet you too... today. What's that, how's the weather in demoing today? I, it has been...

--- Call Setup ends ---

CHRIS

0:53 Rainy but it's looking like it's starting to break up. I think it'll probably pick up later again.

CHUCK

0:58 Hi, I'm out in Cleveland, so we'll probably get your weather and about an hour. So, right.

CHRIS

1:05 It was pouring was coming out our.

JENNIFER

1:10 So I am kind of still new here. So forgive me if I'm if anything goes wrong. So that's why our checks out here to help me out too. So I'm basically first, I just wanted to give you an idea on how we run these meetings. I'm just gonna start out by asking you some questions about your business and just trying to really get a better idea of what you guys are working with today and kind of where you want to be in the future. And then from there, I'll give you a bit of background on service trade itself. And then we'll go ahead and just jump into the demo. Does that work for you?

CHRIS

1:46 Yeah.

JENNIFER

1:47 Awesome. Okay. So you are a business development manager and your company, is that right?

CHRIS

1:55 Correct. Yep. Okay. What a Jack of all trades kinda do it all.

CHUCK

2:00 Okay.

JENNIFER

2:01 What do you do?

CHRIS

2:02 Well, I mean, as far as like I'll have my hand and pretty much everything here. So, but we are an electrical contractor. So we do residential commercial service, audio video, fire alarm underground. We have three satellite branches on top of her, good morning location here. So we just trying to kind of expand our service department and our audio video and kinda tie into that as well. So it's mainly residential focused on the service side. We'd like to be able to kind of pick up more

into the commercial. We just don't really have that good service program that, you know, allows us to kinda get where we want to be right now.

JENNIFER

2:50 Okay. Why is that?

CHRIS

2:52 So currently, we are using Jonas Construction software for our ERP. So we are utilizing the function that they kind of have built in and it does the basics but just it's kinda holding us back. We just, we need something that specializes in that. So, I mean, I don't wanna step on service trade if it's something that you guys don't have it. Like currently with... the program, we're using the so like we are text can see strictly just their schedule. If there's like any of this unassigned work, they are not able to see that. So if they get done with the call early or have some free time throughout the day, they can't go ahead and just grabbing undecided work order and call the customer and see if they could come or whatnot. So they would kind of pick up their stuff and all the day and it's not really beneficial to us. So then something else we were looking for is the ability to, you know, text our customers. Maybe we just for either text or email as far as reminders, alerts, anything, something along that line?

JENNIFER

4:10 Okay. So as long for like the scheduling part, would it be beneficial to see like if there's an assigned jobs, your office can kind have like pull that and assign job and put it on their schedule so that they can see everything lined up?

CHRIS

4:26 Well, so our office can see that currently, it's just out in the field, they can't see that. And then the sinking process from the field to the office is not automatic. We actually have to push the sync through the guys doing the field. But it doesn't always work. And so we have to contact Jonas a lot to have them unlock a work order because it's gotten lost in between it's just a, it's a nightmare.

CHUCK

4:56 Are you looking to keep Jonas as your accounting system? Or you, what are your, what are your thoughts there?

CHRIS

5:02 No, we are actually in the process of looking for a new accounting system as well.

CHUCK

5:07 Okay.

CHRIS

5:08 We, they'll kind of the front runner right now is Foundation you guys were recommended by them. So that was what brought me to reach out to you?

CHUCK

5:18 Gotcha.

JENNIFER

5:22 Nice. And you said that you'd like to kind of get the ability to text or what your customers on, wow, what kinds of things which you want them to see?

CHRIS

5:33 As far as... you know, maybe text on the way, whether that's I don't know if there's like in route function or, you know, something like that... follow up email or I mean message that would have like a survey link... stuff like that. I'll be honest when I was talking with Billy, he was kind of telling me, well, we don't really focus on the residential. So I don't know if that's even something that service trade offers.

CHUCK

6:03 Okay. I think it depends on how much, you know, what you're doing on the residential side. There's a couple of key things we don't do there that like if you're one of the things that a lot of times in the residential space is the whole, when you deliver a proposal to a customer, maybe on site, there's a, you might showing your iPad to say here's. A good solution here's. The better one here's, the best one, you know, like say it's a water cooler, right?

--- Pricing ---

CHRIS

6:33 Yeah.

CHUCK

6:33 We don't really do that kind of proposal but we can quote to them. We can quote to work to get done that type of thing. It's just that whole good, better best type of thing. Gotcha. No.

CHRIS

6:45 That makes sense. Are you able too, I guess finalize the work order in the field? Whether that be something payment?

CHUCK

6:54 Sure. You could close the work order in the field. You know, we're not actually taking the payment through service trade. So that might be the, you can take a payment through say stripers or square or whatever. And then market on the work order that you've accepted payment from them, and then that payment would go directly to your system. We're just not, it's not in the app to do that.

CHRIS

7:18 Okay.

CHUCK

7:19 But you could do it like we have customers doing residential that are accepting payment through that, those devices and then just marking on the work order in service trade that it was the payment was made.

CHRIS

7:33 Gotcha. Makes sense.

JENNIFER

7:36 Okay. So kind of like in the field, like how do I guess? Like what does the text workflow look like? Is there like a Jonas ap or?

CHRIS

7:46 Well, it's more of a web app, it's not necessarily like a downloadable ap from the iOS or android. So that's where it kind of lax. I mean, as far as the communication between field an office, it's not like a direct cloud based type system because it has to ping to our server here in house because it's not in the cloud accounting software.

JENNIFER

8:18 Okay. And I guess like for your size, I'm you mentioned you had around 15 technicians, is that right?

CHRIS

8:26 Yeah. For just strictly the service, they're only about I'd say five percent of our overall. So we'd like to grow that.

JENNIFER

8:36 Okay. So how do you plan to grow that five percent on word?

CHRIS

8:41 So, well, obviously, as far as like marketing whatnot just advertising ourselves, but we want to have that Foundation in place that we are able to allow for that extra room, you know, whether that be with the scheduling or just being able to make it easier for our guys in the field. Right now, I don't think with the software we're using, we're we don't feel comfortable trying to even attempt to grow it.

JENNIFER

9:12 Exactly. Okay. So, do you plan on, I guess like once everything's figured out to you plan on expanding to more technicians in the future?

CHRIS

9:20 Yes.

JENNIFER

9:22 Okay. And I guess like speaking of growth, like how do you guys currently measuring your success in the office?

CHRIS

9:30 As far as profitability goes over?

JENNIFER

9:33 Just like everything because like we just want to help you guys grow. And I guess here technicians to the work they do and opt also increase your revenue.

CHRIS

9:42 So we are very departmental based here. We have our kind of our scorecard that keep track of all the different departments, how they're doing on a monthly level, but we can also break it down onto per job level or work order level. So that would be how we would gauge. But we also have monthly goals that we set for each department, different categories that we want them to meet or exceed.

JENNIFER

10:11 Okay. So what's the average, how much is the average work order for you guys?

CHRIS

10:20 I'd say average probably about 300.

--- Pricing ends ---

CHRIS

10:23 So... nothing major. We do have, you know, other work orders that are a little bit longer, whether it be like a whole basement remodel or something along that lines. But I think as far as just like the break fix type calls, that would be roughly the 300.

JENNIFER

10:41 And I guess for your text back out in the field, you said everything's web based. So what happens if they go out and they see a repair opportunity or deficiency? How would you guys like mark that down?

CHRIS

10:59 They have the ability to... like just choosing the other categories, what we call it where they can not necessarily grabby inventoried item or they can just put a description of something that put a charge to that. A lot of the times they are just booking the price together anyways, with just a description of the work performed.

JENNIFER

11:24 Okay. And how does quoting that out look like from the office to?

CHRIS

11:32 So, yeah, they put that together through Jonas, and then we can kinda just sends out like in a formal quote, it looks like an invoice, but quote form. And then we can then turn that quote into, you know, work order. But with that being said, like you said, we're looking at the different Foundation or whatnot is what we're kind of leaning towards right now, we would plan on having our service kind of hopefully operate under their own platform. And then just with the integration just have the financials and what kind of sink back... I wouldn't want them kind of mess around with two different platforms. There's no need for it.

JENNIFER

12:14 Yeah. So we want to keep like the text side kind of separate the office side and the financial side separate. So then people don't and our mix together and get their hands and things they shouldn't be an.

CHRIS

12:23 Yep.

JENNIFER

12:24 Okay. So, I guess besides service trade, all other softwares are you guys looking at right now?

CHRIS

12:31 We looked at razor seeing, and then I spoke with BuildOps, but they said that they didn't fill, we'd be a good fit because they're strictly commercial.

JENNIFER

12:43 Okay.

CHUCK

12:44 And so those are the only...

CHRIS

12:45 Two that I really spoken with so far that's because that's what Foundation recommended in the past, we have used and helpdesk.

JENNIFER

12:57 And for Jonas, you said that you kinda get rid of it. I was just curious how much are you spending on Jonas right now?

CHRIS

13:06 For just the service module that is roughly 7,000 a year.

JENNIFER

13:13 Okay. And then there's also like the, I guess the accounting side of Jonas to.

CHRIS

13:18 Yeah, which is the different kind of package that's their core package and the services an add-on.

JENNIFER

13:25 How much is the core package then?

CHRIS

13:28 The core package that is 18 year 18,000?

JENNIFER

13:36 Alright. Okay. And if I'm gonna, if I'm able to show you kind of like the mobile side and how I guess the office works in the in house notifications and how we can make your workflow better? Would that be something that you'd be interested in? I guess moving forward with service treated? Alright. Sounds good. Do you have any more additional questions before I jump into the slides and our background on service trade?

CHUCK

14:08 No.

CHRIS

14:09 No, just kind of want to see the overview and see if it even makes sense.

JENNIFER

14:14 Yeah, of course. If you have any questions throughout my slides, feel free to stop me. And also during the platform overview, please don't be afraid to ask. I mean, Chuck, any questions? Awesome. I'll share my screen. Alright. Can you see my screen?

CHRIS

14:37 It is, yep. I see it now.

JENNIFER

14:40 Alright. So service trade, we are a service management program specifically designed for commercial mechanical and electrical contractors. As of today, we have a, we've been around for about 10 years and we've have somewhere between 50 and 100 customers in the states and in Canada. And companies are coming to us with anywhere from three text. So the way from the road to 300 tax and that's because they come to us to, you know, help them grow and scale their business. Which leads me to say that we have been trusted with Clark mechanical, for example, pacific air mechanical, and also electrical companies. Well. And our mission statement is to help commercial service contractors be more valuable to their customers and to grow

their business. So how you grow. So based on our, a long history with working with customers and the mechanical and electrical industry, we've identified a few key things that are top performing companies are doing to drive their growth. So you mentioned before they have growth goals are to eventually expand to additional technicians. So I guess like how are you planning to do that? Are you currently looking to hire or what does that look like for you?

CHRIS

16:06 Yeah. Once we get the Foundation with the servicing program that want to work with, yeah, we plan on trying to bring on some more text and then try and really go after more work.

JENNIFER

16:20 Awesome. So we can definitely help you. I'm grown that areas as well. And I, one of the ways that we want to help you grow is in addition to have a new tax is to also work with the current texts that you have. So getting the most out of your, the resources that you have today. So... how we do this is operate efficiently as possible. So you don't always have to depend on hiring new text or getting new customers to increase your service revenue. The second thing that we want to help you grow with is that we wanna make sure that we focus on your customers experience. So one way would you, that you mentioned is to definitely be in touch with them with the communication that we have especially through email notifying the text. So are going to find the customers when your text are in route and coming and getting the customer experience through a quoting and invoicing as well. Because realistically your customers are going to be the most important part of your business because they're the ones paying you guys. So we wanna make sure that we give them that Amazon like experience where they know everything that the tag is doing and servicing. They're going to be able too see all their locations. Equipment or services are going to be coming up. They can access their invoices online and pay you online as well. And they can access their quotes and respond to them as well as some cross service online. So we have seen that if you get the quote to your customers out quickly, if you give them a party detailed information, you make it very easy for them to respond.

--- Pricing ---

JENNIFER

17:58 You can greatly increase the report approval rating. So we're really big on numbers and our contractors with the best pull through efficiency reported that any repair opportunities that they've found another field. They were able to increase their work orders by 25 percent and then converted 50 to 60 percent of those repair opportunities into quotes and best practices. You want to put around four, two five pieces of multimedia here. I'm just so that it can increase your a quote approval. And we found that approval rate would be around 30 to 40 percent. So I guess like before we jump into the platform the demo, do you have any questions about our background at all?

--- Pricing ends ---

CHRIS

18:42 Nope.

JENNIFER

18:43 Alright. So... let's jump into it. Okay... Chuck, I guess for... the dispatching and scheduling, this is something that he said he was important and I wanna make sure that we go over that real quick and see what that looks like for you. So I want to pick some offices here. I haven't done this part before so Chuck, you can correct me if I'm wrong anything's wrong. So... or I guess like I'll let like Chuck like talk to this part for the, on assign jobs and everything.

CHUCK

19:39 I think if you Zoom out, you might be able to see some of the more jobs out there.

JENNIFER

19:45 There you go.

JENNIFER

19:52 So let's see. So if there's an emergency call and if anyone needs a job that needs to be scheduled, they're able to add a job here and say that where their location is, what kind of services... and they can also select the service. And then they can also schedule a job. And then from here, they're able to assign this to the technician as well. So they can move it into their bucket into their schedule. And this would populate into the iOS app or the android app. So they can see their schedule for the whole day. So would this be, I guess beneficial part of their day to day workflow for your technicians?

CHRIS

20:47 Yes, I guess I would have more questions once you get to the mobile side.

JENNIFER

20:55 So I'm gonna show you what the job looks like from the office. So we're going to be here at this like bonds location, which is a grocery store in California. And this is going to be the job number the populates and we can see here what kind of job is scheduled. So today... the most important part would be what's going on. This is the asset types of the location. This is where they would see the customer location is the details of the service and needs to be performed, including the equipment as well and the parts and labor, and when the work needs to be done and everything that you need for the job and the power of service trade. It's just the easy visibility of what's happening in the field and all the information from a technical, come back to this job for the office. So I'll show you how easy it is from the mobile side. So since this is the office view, do you have any questions before we jump into the technician? Mobile view?

CHRIS

22:02 On your job number? Is that something that is automatically that many characters? Or can you choose the kind of how it numbers?

JENNIFER

22:14 So, with service trade, this is something that we populate when you guys make a job just because if you have any problems with support or anything, this is gonna be the same across the board. So you can mentioned this and it'll be consistent. Chuck, do you have any more insight on the job numbers... Chuck, you're on mute?

CHUCK

22:41 Sorry, is there something you're looking to do with the job number or it needs to be in a certain format or?

CHRIS

22:49 Not necessarily. I was just if it didn't have to be that many digits long. Was the?

CHUCK

22:58 We're we're really just using it that's an internal number. There's really no need for the technician or you to know the job number... or you can search on it a lot of different ways. So you don't really have to remember job numbers.

CHRIS

23:15 Okay.

JENNIFER

23:17 Okay. So I want to jump into the mobile view for you.

CHUCK

23:22 That would get transferred over to say Foundation though, so that there's a linkage between, you know, the accounting system and service trade those with or is that linkage?

CHRIS

23:33 Okay.

JENNIFER

23:35 So, okay. Can you see my mobile application? Okay? So the technicians can see what scheduled on for them, they can filter it by today. So here, once they have multiple jobs, this would be populated in their phone, so they can eventually see what they have next. So today, I just have one job, but if they have three jobs in and day, this will pop up on this page too. So I guess I compare to what you have. What does that look like for you? Did they only see like a job like one one at a time? Or?

CHUCK

24:13 No, they can.

CHRIS

24:13 Look at it by like 50 a month, you list view. They just can't see any of the unscheduled or they can't see any of the other text?

JENNIFER

24:26 Okay. So I guess like a technician can't see a different technician schedule?

CHRIS

24:31 Correct.

JENNIFER

24:32 Okay. So I'll kind of go through the workflow of like this job and show you what that looks like. So click on this job. It can see what services they're there to perform by clicking on the services tile, and then see what kind of contacts there there. So they can see the customers like primary contact, and who else is going to be on site. So, or who is relevant to this job, the job. I, hello, hey, John. It's just like what kinds of parts that you guys need here. The equipment details and history would be in the assets style. So I'm everything they equipment it's going to be related will be on here. And I guess for you guys, you mentioned that you found a piece of equipment on the field? Like how are you guys looking at the equipment history at that location?

CHUCK

25:32 As...

CHRIS

25:33 Far as are you talking about item that we like with service on a regular basis or?

JENNIFER

25:38 Yeah.

CHUCK

25:40 So we don't really have too many.

CHRIS

25:41 Service contracts currently. So that wouldn't necessarily pertain right now. I guess there's not really a process for that.

JENNIFER

25:55 So I'll show you how we do in route part of the mobile part. So you slide here at the Bond to be in route, the tech is on the way. So they can clock in. So this tracks that, this is a time sheet where they can track their location for GPS. So you can see where the texts are when they start clocking in. So when they have arrived, they can click notify customer here. And then they can do an estimated arrival time, say they're going to be there at 956. And then I'll send you an email here. So you are going to be the customer and send and this will pop in your email. Hey, like your technician is going to be on the way. So once they get to the location, they can clock

out. And then it asked, would you like to click on site? Okay. So now the technician is at the building and they're ready to start servicing their work, and this will generate and compile o'clock events here on the app as well. So now they're going to do the services and what happens if they find a deficiency or repair opportunity in the field. So they're able to log that, clicking the deficiencies tile. So this is going to be the biggest driver of the revenue growth. Because if you find if repair opportunities in the field, this means that this is another opportunity for your technicians to go out to get something fixed. So this is, this can be another job that you can win for your customer. So to go into the deficiency, they can add what happens. So you say that you found... I guess like in the electrical field, you felt something that's broken, whether that's wire or anything. Next, you can add attachments of best practices to add a 45 pieces of multimedia here. We're just gonna pretend that.

CHUCK

28:02 Channel on my.

JENNIFER

28:02 Desk is something that's deficient in the field and broken. And so you can use that and attach an ad. And we can also do is recorded audio member and this can record like any weird noises. If they want to do hands free. They can record like a memo on what to fix my next time, click the check and then they can attach this to the deficiency page severity. And then they can tie this to whatever asset is at that location. And then for example, we're going into each fact today, this, the current status of this, the deficiency would be new... and then next add proposed solution. So whatever your tech wants to do for next time they come out. So from here, this since this is cloud based and this app will be like on the app store as well. The sends it directly to the office in real time. So your office will be able to see this notification when they, when the text log it. So before we jump out to the mobile app, do you have any questions about what this looks like from your text point of view?

CHRIS

29:19 No, it's pretty straightforward.

JENNIFER

29:20 Right. So I'll try to jump back to the office view for what that email will look like. So here you can see the deficiency is report it, add-ons so the office would be able to pull this up and view it directly from there. So the most important thing is being able to turnaround this quote quickly so that your customer can approve it so you guys can win more work. So how we do that is that you want to make this into a quote. So I guess like from here, you can add it to a quote, create a new quote for this.

JENNIFER

30:22 And then from here, you can add any templates that are relevant. You can import... anything that you've done by yearly. And then you can just put it in the description. So that saves you time. And you don't have to type out all of this every time a same recurring a deficiency happens for your customers. So from here, you're able to see the parts and labor items that are tied to this quote and the attachments that we found in the field. So, for example, this is... the broken item that we found and the auto members attached. And then you can start generating the coach and

send the customer. So since we have all these pieces attached, you can send this quote out to your customer here. And I'll send this to your email address to that, you can see what that looks like. Okay. Do you have access to your email? Okay? So I'll pull it up on my screen as well. Okay. So do you see the green approve button for your side?

CHRIS

31:45 So far, I just have the on the way email. There we go. Just got the other one.

CHRIS

31:56 I've got the view and respond or click here to view details.

JENNIFER

32:00 If you click to view the details, you're able to pull up what I see on my screen as well. So we wanna make sure that your brand and your logo is in front of their face so that... there's that customer service aspect of it, the customer will be able to approve or request changes on approach here and all the attachments and everything. And the person services and grand total be located here. If you don't want to include this, you can just hide it and whatever you want and just toggle the option for you. And based on what you've seen here, how would this look and feel? Yeah. What do you think? Like they would think of like this kind of have this customer service experience?

CHRIS

32:48 Yeah. I think that's fair. I mean, it makes sense.

JENNIFER

32:53 Okay. So... how would this be beneficial for them if they can see and approve this right away?

CHRIS

33:03 It would be beneficial. I know one of one thing, I mean, we are the kind of company that's gonna go out, do like a 300 point inspection for lack of a better term, just that we're more of a... let's fix what you're wanting fixed and we can point out some items that could use some attention, but we're not the pushy type that's not gonna, yeah. But I mean, I see how this could be the official, you know... it could definitely help you grow.

JENNIFER

33:38 Yeah. Yeah. That makes sense. So if everything looks good, you can approve to quote from me and we'll see how that looks like from the office.

JENNIFER

33:57 Alright. We're able to prove that quote on your site.

CHRIS

34:00 Yep.

JENNIFER

34:05 So once that happens, the office can see that the customer has approved the quote. So one of my favorite things about the quotes, the digital tracking here. So you guys can see when the technician has summit the quote when this was been emailed out, when you viewed it and when you approve it. So we know that you guys like work hard. So this digital history is to kind of cover you and save you. Just so you know, that if there's like any liability, you know, that this has been sent out to the customer and you know, that where they've I'm taking a look at this. So if they don't fix it, if they don't if anything, I'm gross worse, you know, that on your side that you have like been out there and taking a look at it. So based on the digital history in the quote history... would this also be something that you guys would benefit from?

CHRIS

35:12 Yeah, I think so.

JENNIFER

35:14 Okay. So from here... do you have the additional questions about the quote before I go back to the technician view on mobile?

CHRIS

35:26 No.

JENNIFER

35:28 Alright. So we'll take a look back mobile. So from here, the technician is able too, I finish up the job. So you want to create a work acknowledgement for them, slice of contact who was there. So in this case, this would be you, they can put this and have the customer see what services that were done, and what kind have deficiencies that were found. The customer can review this and then check off the t's and c's confirm and sign, have the customer's name populate here, sign off. Assuming that this is going to be your signature, Chris... completes, this will be emailed the copy to you. And then whoever... is also there to like trash. Like she would also see what was there. And then you to get the notification that this job is done. So once they've worked knowledge, this is done, you can clock out and see... but this has done. Okay, finished clocking out. So once the technician is done... my goodness, this has been clocked out, we'll go back and had to the office to finish up a job for invoicing. Alright, do you have any additional questions about the mobile application on everything that they need to do to clock out?

CHRIS

37:10 No, I don't believe so.

JENNIFER

37:13 Right. So, let's view this job again in the job page and see what that looks like.

JENNIFER

37:28 Great.

JENNIFER

37:40 Sorry, my internet, it's a little slow.

JENNIFER

37:47 Okay. So for invoicing, I'm used to like Jonas does all of that. What does that look like for you? I guess in Jonas for the invoicing aspect?

CHRIS

37:59 I mean, in the field, they're able to collect payment and then that submit that back to the office and then we have to do some things on our side as far as to bring that in, but... it's not like say, since it's not cloud basis like automatic process.

JENNIFER

38:23 And like from the office here and they can see that the tech has completed their job. And then here, you can say that the offices that the job is, I'm in Progress, but the office itself can complete the job here and create the invoice as well. And then they can create the invoice from these items. And if you wanted to add a trip charge or any labor charges, you can add that on as well. And this will populate here. So they can edit it and let's just add that labor for you guys with attrition labor. And you can set that as... however much you want for your billing. And then you can add any... trip charges for you guys to do that and save. So since we work with commercial contractors, our customers main point of contact typically like they're not on site. Is that the same for you? Okay? So that's why it's best practice to send your customers have service link. So with the click of a button, you can just easily share this Rich piece of information about what you did with your customer. So the bottom as well as before, you can see like your logo up here, it's kind of like a subconscious thing. If they see that your logo and brand as in front of them, they can see the level of work that you did, it kind of gives that transparency and then kind of winds trust between you and your customer. So they can see that this, but it will look like from their point of view. So I'll pull that up, soon, blow this up and see how it looks like for them. And they're able too pay now as well and see the grand total, all the items here and they can see what Luke vacation you service, what kind of services that were completed? Any files? And of course, any deficiencies that we're located here into the service details. So here, it's the files and the forms that you signed from before, and then the alerts that, hey, we found something that's broken. It's best if like, you know, you get this fixed. So from, I guess from here, how would your customers respond to getting this level of detail?

CHRIS

41:05 They would normally, I mean, I guess, sorry, I interpreted your question there on.

JENNIFER

41:12 Okay.

CHRIS

41:12 Yeah. I think they would respond all the.

JENNIFER

41:16 Okay. So for the invoice, you can go ahead and send the invoice link out and I'm going to send that to you, Chris. So you can see that how that looks like and you can run a message to them on the invoice as well, whatever you want one from the office point of view, and you can write in the body of the message here. This is the subject or the preventive maintenance or any electrical job that you have. And then I'll send this out to you and the invoice should be populated in your email. Awesome. Alright. So that's pretty much the high level overview of service trade. I wanted to ask you. Was there anything that stood out and what was your favorite part?

CHRIS

42:07 I mean, it seems like it's pretty fairly user friendly.

CHRIS

42:16 I guess the sorry, I'm just got your invoice email is taking a while ago.

JENNIFER

42:21 Okay.

CHRIS

42:28 I mean, I think the like the approve email that was pretty cool.

CHRIS

42:37 Okay. So I have an email chain or calling back and we approve that or?

JENNIFER

42:44 Okay. I guess like based on what you saw today, do you feel like service trade could be a good fit for your company? And I'm your customers too?

CHRIS

42:54 Possibly, I would probably take this back to our service manager and have them look at it as well. You know, I was just kind of the first line of defense to kinda weed out what we may or may not work.

JENNIFER

43:09 Yeah. Of course. So you said you had to bring it up to your service manager on who else would need eyes and visibility on this to make the just the decision.

CHRIS

43:19 I would probably take it to our service manager at Trish. Just to see their thoughts on it. I see where why it's set that, it's you know, highly geared towards commercial. I think that is definitely where the focus is. That would be. My only

hesitation is just, I mean, I think it could help us grow that... but I mean, we are a lot of residential right now. So I don't want to be the naysayer but I don't know how my service manager will respond to it.

JENNIFER

43:56 Yeah, of course, they have to kind of like go through the look and feel of it to see if it's like user friendly, download the app to. Okay. Awesome. Chuck, did you want to add anything as well or?

CHUCK

44:10 No, it looks good. I, it sounds like you need to take it to Chris. She's the service manager that she's like.

CHRIS

44:19 Chief administrative officer Billy who wasn't on this. He is our service manager. I would just can't figure out this will direct him with what we want to go with. But I'd still like to get some input from them.

CHUCK

44:35 So, it sounds like your little concerned about the ability to handle the residential side is that.

CHRIS

44:42 Yeah. I mean, I see where it almost seems like it's more focused on like the like a service contract type work where you would have something set up with a customer or ready and you're going out and kind of inspecting these items for them and then getting the approval of whether or not they want you to take care of it.

CHUCK

45:05 Are a lot of your, a lot of your jobs more ad hock, where the customer calls in and says I got a problem and I need to fix it because there is a pretty easy way of doing that too. I think Jennifer was showing the kind of the jobs like you mentioned that are set, you know, maybe a preventative maintenance job that you come out and do two times a year. There's a lot of that, the commercial world, but there is the capability to handle that, add hawk work pretty easily to.

CHRIS

45:40 Okay.

CHUCK

45:43 Maybe maybe this, can you go to the dispatch board real quick?

JENNIFER

45:48 Yes.

CHUCK

45:53 So... this is a different view of the technicians in the jobs and you might have different offices. You might have a commercial office, may have a residential office or they could all be bundled together. Now, if you just click on, add a job there, that green button now here's, where say a customer might fall in and the first thing in my ask him as well. Where are you? So they're in the left hand side, they just say, well, I'm over here. It's Joe are a lot of your customers that they brand new? Or are they cut the customers that, you know, you've worked with before?

CHRIS

46:37 It's a mixture. I mean, we do have a lot of call back of repeat customers but otherwise, yeah, there are a lot of new ones. So that means it's a good mix.

CHUCK

46:49 But yeah, I mean, right here, you can search on an existing customer. You could create a new one. You know, it's but it is, there is a good way of handling that add hawk work as well.

CHRIS

47:03 Okay.

JENNIFER

47:05 So they can do like one. Alright. So for, I want to do to get ready for example, and then you can put their first and last name here. And then... it has been sure discretion our service, whatever they... never spoken to schedule this appointment out. So let's call the iOS and then...

JENNIFER

47:38 Tie this to whatever asset is not billing.

JENNIFER

47:47 Description on the problem there?

JENNIFER

47:55 Chuck, for this to save? What other information would you need to put...

CHUCK

47:59 Hello? Let's see. I think you need an email there as well.

JENNIFER

48:10 Okay. So, you might, you know?

JENNIFER

48:27 And then you can choose whatever tack would need to be on the field next week.

JENNIFER

48:42 Alright.

CHUCK

48:43 So, this, that screen could be used as well for say a residential customer you've never worked with before. You could look them up right there and you can create a new one if you don't if they're not in your system. So you get that new right there and then schedule that job right out forums. So sounds like that might be what you'd be using more often.

CHRIS

49:07 Probably, yeah.

JENNIFER

49:11 Okay.

JENNIFER

49:17 So this is like the available jobs shuttle, not familiar with the dispatch board as much. Can you, I guess like kind of assign the job to whatever technician is, I guess like in the scheduling from the job, I just create an.

CHUCK

49:36 Yeah. If you click on, I did, if you click on available jobs up there in the right?

JENNIFER

49:43 I see, I think I am, I signed a time and date for that already. So for me here, it is... here's. The one I just did. So this is going to be me and it populates it into their schedule here.

JENNIFER

50:04 And you can look at the details. So this is going to be the commercial or residential part that they just called in for, and then you can release just to the tech and the description. You can add for them and the comments as well and create the new services from here and just how you create the new job for your technicians?

CHRIS

50:26 Okay.

JENNIFER

50:29 Alright. Would this be helpful for your office in your text to be able to just easily create this new job and kinda see everyone's comprehensive schedule and just drop it in to their bucket?

CHRIS

50:41 That would be more like what we are, would be used to. Yes. So, yeah, I'd say us.

JENNIFER

50:51 Okay. Awesome. I guess like a, do you have any additional questions I'm about service trued or on any of the features you've seen so far today?

CHRIS

51:02 Would you be sending us the recording of this?

JENNIFER

51:06 Hi, Karen. Yes.

CHRIS

51:07 Okay. Yeah. If you could do that way I can have attrition building our service, can I take a look at it?

JENNIFER

51:14 Okay. Alright. So I guess like for next steps. So for you would be just taking this up with them and see how... they think when would be a good time to kind of get in touch with you after they've seen all of this?

--- Wrap-up ends ---

CHRIS

51:33 I would say at least give me till Wednesday just so that way it gives them a couple of days to... no, I'm not just throwing this out. I'm like, hey, look at it now.

CHUCK

51:42 Hi, I'm looking at it. Yeah.

JENNIFER

51:43 Of course. Yeah, that makes sense.

CHUCK

51:45 And...

JENNIFER

51:47 I guess like if they like it and everything, would they need to be on a follow up demo to just to hone in on additional details for?

CHRIS

51:56 If it, if it takes their interest, then yes, I would definitely do a follow up call and that have them in and then ask some more of the questions that, you know, I wouldn't necessarily think of. So, yeah.

JENNIFER

52:10 Okay. So let's kind of put that on my calendar. Would Thursday or Friday work for them after they see and everything?

--- *Next Steps* ---

CHRIS

52:22 Yeah, I was gonna see if you can tentatively schedule it, but I would have, I would tell them I need is their thoughts by Wednesday. So like give you an email if they say, hey, you know, I don't think that's gonna work or whatnot. Then I could give you an advanced notice.

JENNIFER

52:36 Of course. Alright. So I'll kind of tell until we do it for Thursday then. So what time and date works... for them? And you, if you have their calendar?

CHRIS

52:49 So, I've got meetings in the morning or... any time in the afternoon. It looks like.

JENNIFER

53:00 Afternoon. Okay. And you are in Central Time? Is that correct? What time? So, alright, so I'll be able to do any time in the afternoon. I'll just kinda throw time in there. So, would you say noon your time works? Or?

CHRIS

53:18 I would say one just because might have lunch, whatnot?

JENNIFER

53:25 Sounds good. One o'clock okay. We'll I'll kinda throw that invite out and let me know if you need to reschedule or choose a different date. And then I'll look forward to, I guess meaning you, Trish. Emily. Okay.

CHRIS

53:43 Perfect. Yep.

JENNIFER

53:45 Right. Awesome. So, well, thank you so much, Chris for all the time the demo with me. I'll send you the recording, the recap. And then I'll try to get with Chuck

after this and see what the next steps are on our side. And then I'll do a recap email on what we both need to do to move forward. And then I'll go from there.

--- Pricing ---

CHRIS

54:04 Okay. Perfect. Is there a one last question? Would you be able to provide? Just because I've looked at a few, I can't remember if you had pricing on your site at all? Like a ballpark of what the cost would be?

JENNIFER

54:16 Yeah, Chuck people, I guess like the pricing part first service trade and I'll let Chuck handle the tiers and everything on the pricing side... you're on mute, Chuck.

JENNIFER

54:48 Chuck, you're still on mute. If you're talking, I'm not sure if you are.

CHUCK

54:54 It's showing on my screen that I was on mute. Sorry. Yeah. Okay. Awesome. Cool. So, it's right on our website, we would try and be as transparent as possible. So there's three different levels of pricing based on, you know, what you're looking to do. But the thing is it's all based on the number of technicians because we feel like that's where the focuses that's kind of where the rubber meets the road if you will on.

CHRIS

55:26 So...

CHUCK

55:26 Pricing is based on the number of technicians. So if you look at the different tiers here, you can look at what some of the different functionality is. I'm guessing you're gonna probably fall in this medium, this premium carrier right in the middle just because we're integrating to Foundation. Probably that's where the integrations come into play is in that medium tier. So, okay. That's probably. So you're probably about 1,400 dollars a year per technician is what it comes out to. So this is a monthly amount based on an annual agreement.

--- Pricing ends ---

CHRIS

56:05 Okay... perfect.

JENNIFER

56:10 Okay. Would you want us to some pricing over email as well? Just so like that's presented 2,000,000,000.

CHRIS

56:18 I can pull it up on the website. Like I say, I just looked at a few of them and I couldn't remember if yours had the pricing on it or not. I know there was one that did specifically, so.

CHUCK

56:28 Okay. And the onboarding is out there to show you kind of what it takes to get going with service trade. It's about a three month window. Basically in the whole process is spelled out here as well.

CHRIS

56:43 Okay, perfect.

JENNIFER

56:45 When did you guys want to get implemented if you're I decided to go live?

CHRIS

56:51 So, it would really kind of depends on what we do with the accounting side. I mean, we're not opposed to bringing the service portion on sooner. So matter of fact, that baby preferred. But if it's gonna make it a mess, your process, we would wait till we had the new accounting.

JENNIFER

57:15 Okay. I guess do what's like your timeline for switching your accounting platform?

CHRIS

57:22 So, we've just be, got started the search for that. It's you know, that's the same type deal. We're just to even get an implemented, it would be at least a three month process just to get that up and live. So. But like I said, we're not opposed to starting this prior and just if it's gonna make the pain, we would wait.

CHUCK

57:53 We see a lot of companies do both at the same time sometimes as you're implementing a new accounting system, setting up the field service side so that, you know, things are flowing as you're building I'm in and making sure that things flow when you're on a small scale, just getting started. Sometimes that's a good way to go as well.

CHRIS

58:15 Okay.

JENNIFER

58:18 We have, we have like a integrations like a sites and videos that we can send you to if you were curious about how service fair X with whatever platform that you choose.

CHRIS

58:33 Yeah, no, definitely specifically answer right now Foundation just because that's the one we're kind of leaning towards. We don't wanna get too many options out there but not be able to decide.

--- Wrap-up ---

JENNIFER

58:46 Yeah, for sure. Let me see if I can just, can you see... the Zoom chat by chance or I can also send just to the meeting or to your email too. I feel like if the integration, so you can just take a look at that on our website and see what peaked your interest and look at the integrations for what we help with Foundation.

CHRIS

59:11 Okay, perfect.

CHUCK

59:16 I need the job, Chris, nice to meet. You know, I'll follow up with the Jennifer.

CHRIS

59:23 Hi. Nice meeting you as well.

CHUCK

59:25 Thank you. Have a good day. Have a good day, you too.

JENNIFER

59:28 Perfect.

CHRIS

59:29 Alright, bye.

The End