

# ServiceTrade NorthBoundary Overview

Patrick ONeill with Infinity Contractors, Inc. Recorded on 5/12/23 via Zoom, 33 min.

# **Participants**

**SERVICETRADE** 

Patrick ONeill
Account Manager

# **Infinity Contractors, Inc.**

Mark Tanner Service Manager

# **OTHER**

**Infinity Contractors** 

Jim Stagg

# **Topics**

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# **Transcript**

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

--- Call Setup ---

#### **PATRICK**

0:00 Good morning. How are we doing now? What we're doing?

# **INFINITY**

0:04 Let me, let me do something.

#### **INFINITY**

0:21 Very nice. All right. So, can you hear us any better now?

#### **PATRICK**

0:24 Yeah, I got you. Can you'll hear me?

# **INFINITY**

0:27 Yes. Now we are actually having a conversation. This is.

# **PATRICK**

0:31 Okay. You?

#### **INFINITY**

0:32 Is coming from a far away laptop a moment ago?

#### **PATRICK**

o:36 No good. I feel like that's what my wife wants sometimes get away from me with that voice. So, thanks for taking time, to talk with me this morning. You're all about an hour back from out on the east coast or our central Texas time. Okay, cool. Yeah. So thanks for coming in early on a Friday, and meeting with me. How's everything going?

# **INFINITY**

1:00 Let's just call it Friday and move on.

# **PATRICK**

1:04 Fair enough. Well, as I'm sure you all have heard Northboundary, I work for service trade. My name is Patrick Neil. I've been with ServiceTrade since 2017. I was the 20 sixth employee of the company spent a lot of years doing what we call strategic implementation. So our largest clients were the ones that I handle, but I've recently made this the switch to account management here. So I am a strategic account manager now. So I kinda handle our largest clients and make sure that from a business perspective, you all are getting what you need. I'm your advocate here within the service trade family. So if you'll anything I'm here to help for you here to advocate for you. But I know you all are Northboundary users. So that's kinda why we're here today, you know, service trade got found out about Northboundary, we got really excited about it. And last year we acquired that company and now they're under our umbrella of companies. So ideally I wanted to get some time with you all understand how you're leveraging Northboundary and your daily sales operations, see what I can do to help you all get the most out of that. And I know we've got a renewal coming up on Northboundary. So wanted to try and get flat on what that would look like for you all as well. That sounds like a good agenda for today's. Call. So, who am I speaking with? I know mark and Jim took the call, but which one is two?

--- Call Setup ends ---

**INFINITY** 

2:30 I'm mark?

**PATRICK** 

2:32 Mark. Okay?

#### **INFINITY**

2:34 Yeah. So my introduction, my role Infinity is overall president of the organization. Mark is over the service organization, service manager. I got to Infinity about three years ago. Mark got here about two years ago. The, I got here in time to write the first COVID policy and mark got here just in time to figure out that service a carrier was a little bit different than service inside of a mechanical contractor. So he's got some different routes. Mark comes from us from northern California. I've been in Texas about long enough that mark hasn't been able to meet anybody that doesn't know me. So... so, our role with northern boundary has been, I mean, our relationship with northern boundary has been a good one. So we about a year coming up on two years ago were acquired by P mechanical and controls out of Arizona. They already in their service department had been using northern boundary. We had zero tools for us to use meaning proposals and estimates and everything was an excel spreadsheet or a word document that has been, you know, created in the eighties, and trashed over time. And and so, so we moved quickly. When we found that northern boundary was available, Vince was an unbelievable resource to get it spun up. We didn't have a sales team per SE. We had a sales manager and a service sales guy only before mark got here. And then we transitioned out from the old guys to the new guys. And so mark replaced the service manager. And then we got a service sales guy and ferret to replace the sales. And we got one more sales guy going right now. So we really, we don't have a tremendous amount of sales activity. We really need more that and we do have the desire to get more sales guys going. But northern boundary was, the tool that allowed us to have some visibility into the system of where we were, you know, where are we sending quotes? And what were, the level of codes and consistency across our cost? All those things.

So in short order, it gave us a bit of a backbone to our process, you know, for what's going out the door, and what are we committing to? And what are we reviewing? So inside of marks organization of service technicians, and as many as one administrative person in Sydney and one service, what we'll consider field supervisor, who really just gonna manages all the guys out there, getting work done is an invaluable resource. But he's also across now 10 technicians. Most of those guys are young in their careers, and like more residential to like commercial in their experience. So he's continuously training and teaching those guys as well, as teaching our sales guys. So, so that guy isn't on this call because he doesn't even have a northern boundary log in just like you guys get it sold. I'll take care of the work. So, and then I'll just share. So my experience was actually more with service trade over the years I worked with brand and we had for some time, you know, getting service trade and implemented across all that. We went to several conferences, you know, kind of engaged at those levels of implementation. We actually, you know, went down that path, you know, towards service trade, for a while, right about the time I was about getting to get you guys on board here in pueblo or her Infinity. Pueblo says, no, no, no, we're gonna do standard across the board. We're gonna do build off and so, so like likely is it look would have it now? You know, we missed service trade as I would have liked for our technician experience, but now you own our sales experience. So, so anyway, so that's kinda where things are on our end Patrick. And, and mark is the daily user of the software with the sales guys. I only log in monthly to quarterly kind of validating where we're at. I mean, they do commissions reviews off of like, you know, spreadsheets, that are, you know, what's actually been sold but everything else that they do, you know, like kind of what generates the workflow back log funnel and all that. So, we use it pretty heavily for what we do on that side.

# **PATRICK**

6:56 Okay. So, so mark, in terms of all of that functionality, are you all leveraging the proposals for your maintenance and projects? And are you using the CRM functionality as well?

#### **INFINITY**

7:07 Yeah, absolutely. I'm in every day and all day long, you know, looking at, you know, proposals that we have customers looking at booking?

	PATRICK
7:17 <b>Is</b>	
	INFINITY
7:19 Using it, yo	u?
	PATRICK
7:21 Now, when	you

# **INFINITY**

7:22 Know, proposals get put into northern boundary, you know, I review it with the salesman before it goes out to the customer, just like Jim said, we use it for, you

know, commission reports, looking at cost, you know, things on a regular basis. I use it to run monthly reports, salesman, you have a look at it.

#### PATRICK

7:42 Their...

# **INFINITY**

7:42 Activity, you know, things such as that, but I'm in it all day every.

# **PATRICK**

7:48 Awesome. And, you know, it sounds like you all have benefited from, that structure that an out of the box solution can provide because, you open the thing up and you've already got some guardrails in place and ideally it maximizes your efficiency and your consistency across your pricing, your profit margins, making sure your labor and everything is dialed in. So it sounds like you'll understand the power, of that product and are utilizing it and your operations daily. So, I'm really happy to hear that Vince is still here. So Vince is not, has not gone anywhere. He's working with our product team to continue to make enhancements to Northboundary. We are selling Northboundary as a standalone product right now. Like so everything as we as you all might have known it a year ago is still the same. It's just a different owner for now. So I guess part of what we're sort of transitioning towards like I think, for events he sort of had like an office based pricing model, right? That was kinda how he did it. And so what we're what we are sort of moving towards for like net new sales, right? So if you're never bought Northboundary before, never use it. We're we're selling it to new people as sort of a licensed user based model, similar to how service trade. We only charge for technicians, right? So if you got 10 text on your team that's how we charge and any of your supplemental, your admins, your office, folks, your quotes, right? They all sort of, we don't charge them for licenses. So the taking that model, and sort of applying it to Northboundary. The way that we're using this is we're thinking about sales users, right? And the definition of a sales user would be the users that are assigned to leads and opportunities and proposals, sales users can build and send the maintenance and proposals agreements, and the supporting documents. So it's really, the folks in your organization that are doing the selling, anyone like Jim who comes in like once a month, overlooks things or potentially just approve certain estimates. And I'm sure you'll have some sort of hierarchy that wouldn't be considered like a sales user. So similar to how service, if you're supplemental to the motion, you're in there, you can look around poke around. But for those of you that are like creating the proposals, that sort of the model that we're moving towards again that's for net new business, how many kind of understanding sort of that idea or that definition that we're kind of putting in place. What would you like we had that you all had maybe two to three sales users in your organization for you all specifically, does that track?

## **INFINITY**

10:20 So, currently, we have the sales people that are using it. You know, I use it on a daily. I also...

#### **PATRICK**

#### INFINITY

<sup>10:28</sup> Service coordinator. She uses that as well. No, just, as a tool to poke on and look for. She's not doing any.

#### PATRICK

10:37 Maybe or anything like that.

#### **INFINITY**

10:38 I also have a technician that later, this is going to be transitioning into a sales role and we are starting.

#### PATRICK

10:47 And...

#### **INFINITY**

10:47 Work in the system as well, just, you know, on a random, there's no rhyme reason I use.

#### PATRICK

10:53 Right now.

#### **INFINITY**

10:53 Just trying to get him used to using it as a Salesforce?

#### **PATRICK**

10:59 Cool. So, it sounds like you'll have two now three coming online. When we think about your projected growth, right? Like where you all, and Jim, you kind of talked about adding more sales users into the organization, like over the next three years, where do you guys see, the sales organization? Like how many people I know in an ideal world, do you see cutting proposals and doing maintenance agreements?

# **INFINITY**

Well, I guess they'll take two, two approaches to that answer. Just Infinity growth, the way that we are and the track that we're on. I would say that the size of the organization in three years would be at least a double just because we're not really even cross yet and we really are looking to at least. I mean, I'm gonna say double our sales people over this next year. We got two with a hybrid by next year, like it to be four, right? So like, you know, like I like the hybrid to be in the full role. We have to probably do an upgrade of maybe one of our guys now and then so be a change out. But then we'll probably need to get one more, you know. So we got three full time and one developed into 74. So that would say like, you know, for count one one thing based on kind of the organize to it was interesting we had, I guess VP of service from we visited us just yesterday Wednesday, they do. They, they have their team broken out kind of we would be equal to about one of their teams there. And they didn't tell us exactly salesmen per team, but they did tell us that per team, they

tend to have, a sales estimate or I mean a service estimate or somebody that really backs up all, the estimating support that field needs to just turn around quick turn proposals, you know, for, you know, found items. And so I can see that, you know, by sent similarly. So we had four sales guys plus probably a service estimator, you know, easily by end of next year, third year, you know, we'd be maybe another team beyond that, another one or two. So we really talking about, you know, just really kind of organically over the next year and a half. I mean, next two to three years being in that, you know, maybe that's the four to six window of serial selling individuals. But then I take that and say we are partnered with or I should say pueblo owns an evolution, another service group in Dallas evolution mechanical. They're gonna keep their same brand, their same name but we're you know, we're pretty much sister companies. They primarily handle Dallas. We primarily handle for work but there's really no boundaries in that. We're we're gonna grow both organizations. I could see where as we get consistencies on tools and processes and all that kind of stuff that, you know, they'll be dispatching out of BuildOps and we'll just be a different location within BuildOps, right? Northern boundaries already being used in you know, Arizona, and I believe that, you know, they would be, you know, they would be the potential to bring on right now. Their service organization makes our is probably three times, by folks. We saw about 30 of those guys technician wise the other day maybe. And, and actually they have a plumbing service. They, they might actually be like four and what the retro maybe is four or five teams of technicians, but they only really currently have three sales guys. So, but you can easily say, hey, if we were to kinda leverage together immediately that's a plus three, right? So it's three, three there kind of thing. And then that they will probably grow as quickly with their sales team just because they are more mature service organization. They're probably not gonna add that many, you know, people that fast.

# **PATRICK**

<sup>14:41</sup> Got it. So, you know, based on sort of that assessment with Paul and I have a meeting with Paul too. I guess, are you all as you?

#### **INFINITY**

14:51 Not pull not pull. Hulk is another mechanical contractor here, in the metroflex.

**PATRICK** 

14:59 I'm sorry, who?

**INFINITY** 

15:00 Pueblo, pueblo camping controls is in Arizona.

PATRICK

15:04 Yeah.

#### **INFINITY**

<sub>15:05</sub> And our sister company in Dallas is evolution mechanical. So, polk is a whole different enterprise.

<sup>15:12</sup> My, I misspoke, I was confusing my PS. So I also have a call with Pablo. Sorry that's what I mean. I have a, I have a call with everybody.

#### **INFINITY**

15:21 We...

#### **PATRICK**

<sup>15:23</sup> Do I, do have I'm currently reaching out to the pebleau company? So I guess, sorry for, my misspeak there. So, I guess in a sense, if pableau, is the owner of you all, and the sister company like organizationally wise, like financial wise. Do you still like, are you all getting build for all the stuff that you use? Or does that now roll up to puebleau, like if we're...

#### **INFINITY**

<sup>15:47</sup> Individual individual operating company, they keep our name, our financials, our payroll is us, our profit is us, you know, I just, you know, yeah, they just the umbrella organization at private equity, so.

#### PATRICK

16:02 Yup. Who is the PE back on that? Do, you know?

#### **INFINITY**

<sup>16:05</sup> Yeah. Omers, ontario municipal employee employees retirement system. So they're out of Canada. Obviously, they picked us last year, you know, our overall company evaluation, you know, allowed them to reach out and grab us that, you know, that they're like that next year we were with her on capital out of Michigan the first five years or so.

--- *Pricing* ---

#### **PATRICK**

16:30 Got it. Okay. Yeah. Well, so it sounds like based on where are you all now? And kind of what you, are your trajectory with growth, what I'm hearing is maybe four by the end of this year. If we're projecting that out to like six over the course of three years, you may ideally have up to five or six sales users eventually by the end of, that term and really kinda getting after that growth in the short term and the long term, ideally... where, you know, what we're offering for legacy Northboundary clients. I think you all are paying 1,800 a year. Is that right? 1,850 a year for Northboundary?

# **INFINITY**

17:09 That sounds pretty close. That sounds?

#### **PATRICK**

17:14 All right. Okay. So.

17:16 One time, you know, we're paying at one time, not like you said, not an S as kind of model, so.

# **PATRICK**

17:22 Right. Yeah. I had you all is 118 51 payment of 1,850 per year, for the service. So that's what our records were showing, what we're, what I'd love to be able to do if you all have a renewal coming up in June one is if sort of what we're you know, what we, what I would prefer, what I'd love for you guys, to get set up with would be taking that 1,850 that you're paying now? Okay? And then build in some growth for you guys. So let's say you've got three now, right? You're using sales users. I would love to be able to kind of have that contract be for five users. So that gives you some growth into this year potentially next. So set that five users at the 1,850, which is what you're paying now. So at the renewal, I'd love to get you all into a three year contract where, we take that 1,850 with that five users and we bump that up 10 percent. I, so when you renew you'd, be paying 22,035. The second year, I'd be two two three eight point five. And then the third year, I'd be 24 six, two three five with those five users. So the idea there being that giving you all, that wiggle room to grow into this and to not drop you on the current pricing model which is for us the way like for net new, I'd be 99 dollars a month per sales user, which is 1,188 per year per user. That's not what we're trying to do with legacy customers, right? So what I'd love to do is get you into a three year deal with five users, room for growth, 10 percent lift year over year. And then if you get into that six user between now and three years, that six user would then be subject to, the current or the newer pricing model where it would be eight, 1,188 per year per user.

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#### **PATRICK**

19:09 That's you know, that's what we're encouraging all the legacy folks to get because we wanna work with you all we want to continue to iterate on this thing. We wanna, we understand that it brings value to your organization and we wanna make sure that we can continue to make sure it's a product that you can look to grow, and be successful. How does that sit with you guys?

--- Pricina ---

#### **INFINITY**

19:30 Well, you know, I mean, I guess nobody looks forward to, you know, going, you know, substantially increasing, our cost of business. I mean, obviously we have the value of unlimited users at the 1,850. I mean, it was kinda like, you know, we're pretty much not expecting any increase per user, you know, and obviously knowing that your new model already has us behind it. You guys are obviously to catch us up. I mean, obviously the, I think we just did it your way. We should have already been at 20 35. I mean at 1,180 per person. If we just said we had two, right? We should be at 23 76 a year versus 1,850. So, and if we started using, the one other even if in a part time role, right? Even if you're saying, hey, if we started using it for a, you know, it's another 11 eight. So that put us at like a 3,500 dollars. So basically, hey guys, welcome to service trade slash northern boundary. Yeah, continue to use it for your office and we'll double your price next, you know, I mean, I mean, I get, we double your price as of, you know what? Right now today, if I saw the new rate sheet, I, my gosh you double the price, to just do what we're doing. So, you know, that's an

impact. All right. Obviously, that's a pretty, I appreciate the soft stepping it towards a successful migration. So, you know, I mean obviously the getting us to where we're on track for five. I guess just doing that. Now, now you said a three year agreement that puts us at like, so, the first year you said like that we're renewing just as we have budgeted 1,850 on, is it June one or August one? I think it might be August, but anyway, it renews at the same price as what you're saying?

#### PATRICK

No, sorry. It would renew at, it would start year one at the 10 percent bump from 1,850 to. So it would go up to two zero three five which would still be under what the new model pricing would be for three users. So you're still under that. And again, I'd love to contract you out for five. So you can just add for the next three years without having to have that price go up unless you get into that sixth user.

# **INFINITY**

<sup>21:40</sup> Yeah. So when you said price it out for five, I mean, with the, I think what I heard you say is like, so we go to 20 35 and then it's 10 percent. It's a, it's an increase of 10 percent year over year.

# **PATRICK**

21:52 Correct.

#### **INFINITY**

21:52 By the five, does that continues to 10 percent year over here? Five years?

#### PATRICK

21:58 Good. So we would, you would have up to five users. So they're building in that growth for you? That would stay, we launch you at the 1,850 mark with the room to grow in. So the first year, it would be 22,035. And if you don't get into a fifth into a sixth user in year two, then you're just paying 10 percent over of the next year. So that would be 2,238 50. And then on the three third year, if you're still at that five threshold, then you would be paying the 2,462 35, for the third year. But with five users under the new price, right? I mean, what we'd be looking at there like would be, you know, you'd still be weigh under what we would be charging net new clients, which will be right around 6,000 dollars. So 5,940 for five users under the new pricing model.

#### **INFINITY**

<sup>22:49</sup> Right. So if I, if I'm hearing correctly, you know, sign up day, pick the plan, say it's a five year with 10 percent year over here. We started.

# **PATRICK**

23:02 Three, sorry, three years five.

# **INFINITY**

23:03 You said that you'd really like to sign this up for five?

#### PATRICK

<sup>23:05</sup> Sorry, I meant when I said five, I meant five users for the, yeah. All right. So that's why I'm saying give you some room to grow in. So five users over the course of three years.

# **INFINITY**

23:16 Got you. What happens at the end of the three year agreement?

#### **PATRICK**

<sup>23:23</sup> Look at where you are. If you're still at the five user threshold and you know, then it would just be as far as I understand, it would just continue with that 10 percent lift. If you all are still finding value in the product and continuing to use it to grow your organization.

#### **INFINITY**

23:49 Okay. So... I was just trying to, I was just backing off from that five year plan. I thought that we were okay. So on the renewal at 20 35, we go first year renew is 22 38 second year renewal. Is it 24?

#### PATRICK

24:10 Six to 30?

#### **INFINITY**

24:12 There's still a third year renewal that take the 27 to eight.

#### PATRICK

24:18 No, that's for three years. So that would be.

# **INFINITY**

24:21 Yeah. Okay. Pay now, 20 35 and two two steps.

# **PATRICK**

24:25 Exactly. Yes. Yeah.

# **INFINITY**

24:29 All right. So.

# **PATRICK**

<sup>24:32</sup> And again, that's for five users. So still giving you that room to grow into that number? Okay?

<sup>24:48</sup> All right. Well, obviously, we, you know, appreciate being on track. I guess the thing that comes to my mind is that with the idea of growing beyond, you know, we got five users as a target. We're not using five today. We're getting discounted rate. We're really only increasing that, what we talked about. I have the ability to expand under this umbrella up to five, but it's a three year agreement. So this year over year 10, what's the out on the agreement? You know, obviously in a company that's growing and changing and getting new software and all that. And I find out like you come in on whatever December first and they say, by the way, Jim here's your new software that's going out, you're now using Salesforce, right? So, what's the out of the agreement when that gets done?

#### PATRICK

25:36 Are you talking about the three year agreement with the out?

# **INFINITY**

<sup>25:39</sup> The fact that we've entered into the three year agreement with you guys, I've been part of agreements before that have buyout that equal like the amount of the agreement, right?

# **PATRICK**

25:48 I...

### **INFINITY**

<sup>25:49</sup> We're going to be as model that meeting per user, for year per month or whatever. We're gonna kinda break that out paying? I'm sure. All at once, I mean, you guys are you're not billing me monthly, right? You're billing me in at one time?

#### **PATRICK**

26:05 That's that, yeah, I think that's what you are doing now.

#### **INFINITY**

26:08 That's fine. So we get to December this year. And, and my company, you know, corporate decision is we're not using northern boundary gonna move over to something else, right? So we're already on this. So what's the buyout? You know, if it's December, is it appropriated, you know, you already paid for the year? We do, you know, is I know you paid for the, and the next two years, like, what is the buyout?

#### PATRICK

<sup>26:28</sup> Yeah, that's a great question. I've not been asked that question. So I can go find out for you, what, that, how we would handle that, my thought would be is that if it was a three year deal, it would, you know, I don't know. I need to figure that out. I don't wanna make any promises but let me go ask, the folks that make these decisions and see what they come back with and I can follow up with you.

26:49 So I'll just give you the example that I have is, a gross overstatement. I haven't seen anybody but this one company do it, but we had a uniform service that you, I'm sure you've heard of into organization and they per uniforms per month, all that kind of stuff, right? But their buyout agreement on uniforms held you to the contract period for the quantity of uniforms. And so it was an unbelievably expensive buyout and it was like in, for the term that you had held. And so we had some office guys, you know, just kinda doing the typical year over year signed Renee and there you go to a T. And then we said, hey, yeah, this is a very expensive thing we want out of this. I said no problem. Just go ahead and pay us the whole, you know, 35,000 today and you can leave. And it was like what? So, so I'm just cautious about clauses. In theory, we're gonna be fine renewing at the 20 35 and renewing the, you know, keeping obviously the grandfathering in, we're going to be fine with the five users. I think that's gonna give us. I have zero concerns going this year to next year, you know, with five users and into the, you know, we can, obviously, you don't kinda go probably into the next year, right? I mean, mark and I, we might get lucky, you know, and early, but something open, but the reality is that we won't be able to keep up with like five super successful sales guys. We'll only be able to keep up with two to three really successful sales guys. We just don't have that right now, my field force.

#### **PATRICK**

28:22 Understood understood. Okay.

#### **INFINITY**

<sup>28:24</sup> So we're gonna, if they become high performers, we're gonna have more work to do on the back end. So we're not going to be live by that.

# **PATRICK**

<sup>28:32</sup> Understood understood. Okay. I mean, it sounds then what I'd love to do is it sounds like what I will go get you an answer on the buyout, right? What that looks like? I'd like I just, I can put a contract together for you so you guys can take a look at it. It's not like an official one. Take a look at the terms, take a look at the keynotes, whoever you need, to run that up to or whatever.

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# **PATRICK**

<sup>28:54</sup> Let me, you can do that. Once you all feel confident and comfortable. Once I get back to you on the questions you have, then, we can go from there. But yeah, I totally, I feel you on the, if you have five strongly successful sales users, you wouldn't have the technician, the ops power to go and deliver all of that.

--- Small Talk ---

# **PATRICK**

<sup>29:12</sup> So hopefully, over the course of the three years, it's like you said an organic growth, a gradual growth to be able, to move into that spot. And if you, if you're at that point, ideally you all are making, some chatter as the kids say.

29:26 Yeah. Now.

#### PATRICK

29:27 Hey, how's the north? Excuse me, the BuildOps implementation going?

#### **INFINITY**

<sup>29:35</sup> On hold. They're going office by office. So our Bill of, is tied to our ERP upgrade as well. So it's looking like late for us. It looks like late fall or I should say late summer, early fall, I guess.

#### **PATRICK**

29:50 Got it. And what's the integration for the ERP?

--- Wrap-up ---

**INFINITY** 

29:55 In tech?

**PATRICK** 

29:56 I at.

**INFINITY** 

29:57 Yeah, I see.

# **PATRICK**

<sup>29:59</sup> Yeah, yeah, we've got one for them too. So, okay, cool. Well, guys. Thank you so much for your time. I'm gonna, you're gonna have my email address. I'm gonna give you all the information that you need to be able to reach out to our support team if things are happening in Northboundary that you need help with that, you click a button, you expect to get an apple, but you get an orange, we're here to help.

--- Next Steps ---

#### **PATRICK**

30:18 We have support hours. Monday through Friday, nine am to seven PM Eastern Standard Time. I am your advocate here within the company, you all can holler at me if you need anything. I'm here to help if you need that in the moment tech support though, I would ask that you point that to that team because, you know, I'm on these calls, most likely the majority of the day or I travel a lot. I'd love to get down there and visit you guys, see how leveraging it. Yeah.

--- Next Steps ends ---

30:45 I'll take it back to that offer. Yeah, Vince is always offered us to train. Gotcha. This as far as onboarding or other sales guys.

# **PATRICK**

30:55 Yeah, yeah, yeah. Holler at me about onboarding guys. I will have it for you. You, let me know what you need. We'll make it happen but you all have unfettered access to our support folks. Like I said, Monday through Friday, nine am to seven PM eastern standard. Vince is here guys. So holler, Vince, if you think, yes, sir, you need anything, just let me know. We'll, get you what you need, okay?

#### **INFINITY**

<sup>31:18</sup> Patrick, what is the difference between when you say users? So our salesmen are using, you know, for my access, I'm just, are the salesman considered the user or I considered the user as well?

#### **PATRICK**

31:32 I'll put the definition in the contract for you and, the note so you can really dig into that. But the sort of what, the way that we're looking at this is sales users are the ones that can be assigned to leads opportunities and proposals and sales users can build and send maintenance and project proposals and the supporting documents for that. Now, the other users, right? Would be people that are, that support the sales users for key activities like asset and data entry. Users will be able to have read only permissions to review proposals and pricing. So, you know, what we're eventually will do is that, there will be guard rails within Northboundary, that like sort of like permission sets with your users in Northboundary, like, hey, you can probably go anywhere, do anything but maybe like one of your sales folks that can't mess with like the pricing or the overhead margin. So it's gonna be more of that kind of getting worked into the system there. And so as that stuff comes on more online, more and more, it's going to be a pretty clear demarcation between like eventually, ideally you're just getting like, hey, I need you to approve this for me. I'm pushing this thing out and you're just like in there supporting the motion but you're not driving the revenue if that, and I'll put that definition in there for you. And if you've got any questions, comments concerns anything we can think about from your perspective that would make this, you know, work for you all we're here. We're here to hear it. So sounds good. I appreciate. Yes, sir, mark. Hey, have a good weekend, man. I appreciate it. All right. Thanks. Bye bye.

The End