DeTemple | Path Forward

David Teeter with DeTemple Company Inc
Recorded on 3/6/23 via Zoom, 56 min.

Participants

SERVICETRADE

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Account Manager

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DETEMPLE COMPANY INC

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Topics

Transcript

--- Pricing ---

DAVID

0:01 So, renewal is in August. I don't know. I thought it was more so than it, but still, it's important for us to talk to him?

SKIP

0:13 Have they, are they current on payments?

DAVID

0:23 See, hold on stuff.

SKIP

0:26 They still owe us 72 66.

DAVID

0:32 Yeah... I think that's why I thought they were coming up... on renewal because that looks like their last quarterly done it. I'm not sure.

DAVID

0:56 Their agreement was for August. So I looked it up, okay?

SKIP

1:18 They're labeled as a first year, do a.

DAVID

1:21 Right? Because of their payment.

DAVID

1:29 That's when we switch that over because we thought they were renewing like next month last time we talked about it.

--- Pricing ends ---

SKIP

4:35 So, did you get any information about this?

DAVID

4:42 No, they were still under the purview of CSM. The only thing that I knew and had heard was that they were having a hard time getting up with them. So... I got up with them.

SKIP

4:59 Looks like you had a handoff call scheduled. I don't know if it happened October.

--- Call Setup ---

DAVID

5:12 Was that he had a hand off call? I think it was a non live handoff call with Lindsay. So.

SCOTT

5:18 Yeah.

SKIP

5:18 Jens last note was that they were ready to roll out here.

DAVID

5:24 We go.

DAVID

5:29 Here comes Scott. I...

DAVID

5:39 Hey, good morning. So.

SCOTT

5:40 Sorry for the delay.

DAVID

5:42 Yeah... no worries. I appreciate you hopping on a call with us.

SCOTT

5:48 Got to the office. So I had to wait for my computer to boot up.

DAVID

5:53 Got, luckily, there wasn't like a Zoom update or something you had to wait on too.

SCOTT

5:56 Yeah, right. I...

DAVID

5:58 Feel like that stuff always gets you right in the moment. It's like almost there. And now another update. Well, yeah, thanks for hopping on the call first thing this morning with us. I think really what we wanted to do is just get a touch base and then a good understanding as to what's going on your end because we know that the, our CSM team, our customer success managers have been trying to reach out and get in contact and I am now your account manager again after some back and forth. So I wanted to get back on the same page with you and hear a little bit from your side of the story as far as what's changed since last we spoke. I think back.

SKIP

6:40 Hey, Scott, let me introduce myself to you as well. I'm skipping and gonna run the account management organization.

--- Call Setup ends ---

SKIP

6:48 And yeah, I asked David to include me on the call because I'm really interested and I know you guys are using Northboundary as well as you had attempted to start using survey and we're the same company now. So wanted to chat with you and find out the story.

DAVID

7:10 Yeah.

SCOTT

7:11 Yeah. So on the service trade side, you know, we got almost all the way to the point where we're ready to use it. And then there were just too many obstacles that just were not working in our favor. So accounting integration was one of them just the way that the billing and invoicing worked, the having to have multiple... different sites that the mobile guys had to go and visit, not being able to preview an invoice. I mean, there's just, it just kinda goes on and it's not really built for our industry. So, and we found a product, it's called BuildOps, which is actually built for our industry. And it works with our industry. I mean, there that's where they started was in the heating and plumbing businesses. So they've got... great project management. They've got great maintenance. They've got, I mean just everything seems to be going for us with that system. And I mean we didn't even, we weren't really seeking them. But once we found out that there was just, there were just too many things that just wouldn't work for us with service trade, just, it just kinda popped up again and we took a look at it. And now we're moving in that direction, so.

SKIP

8:58 Scott, thank you so much for that. So we do have about three to 400 customers in the mechanical hvac space. And so, you know, that, that's what? And, you know, that's one of the reasons why we bought Northboundary is to kind of bolster our offering there. So when I hear you say we're not built for that space that's what I want to explore a little bit. So I can share internally. You kinda touched on a little bit with BuildOps and what they offered, we do certainly all those same sorts of things. But sounds like there was a little bit of a miss on how we address workflows for you guys. So I'd like to dig in a little bit deeper on that if I could.

SCOTT

9:42 Yeah. I mean, so I mean, the very first thing that we noticed was you don't ask us what our business is and how we work. You don't gather our requirements. You just say this is the system. This is what you have to use. And with other systems that we've had there, they come in and do a little investigation, they find out how we run our business, what our requirements are, and then they say yes or no. We're not a good fit for you. And so, you know, service trade was a different way of doing that. It was here is our platform. Here are some videos to watch and that's your training. Thank you very much. And so the other systems, you know, they build out an environment, they get your data in there... you work with it and they say, well let's do it this way. Let's do it that way. You know, it was just a different experience than what myself or Michelle are very used to in that, you know, going implementing many systems in our history. It was not what we expected.

--- Pricing ---

SCOTT

11:15 And then I know that now you guys have Northboundary, but that was one of the things that when we first started was, well, we need maintenance agreements and you said, well, we have contracts. But your definition of a contract is basically pricing contracts. It's not managing maintenance contracts and that's where we actually had purchased Northboundary somewhere in the middle of us, kind of onboarding with service trade because you didn't have that functionality and then loan to hold guess what service trade bought them. So... so, so at least we've got that going for us now. But this new system, it does have service contracts in it. We're not sure which system we're going to use yet because you, because Northboundary also has a CRM functionality which the build ups does not, right? So we're kind of in a middle ground with that now too if to see if there's some integration between that and build ups. So we could use that as our CRM or we just move away and use, you know, build ups as... our main system and then find a CRM. So we're not really sure on that and yet Scott, where?

SKIP

13:04 Are you right now with implementation of BuildOps at what stage? I think you guys are officially under contract until August, but I'm curious as to where you are with BuildOps in terms of that whole requirements gathering and implementation and everything.

SCOTT

13:22 So we've done all of that. We're about three trainings away from going live which is about a month, I think.

SKIP

13:34 So, can you describe the sort of the process? Because I think that really struck you as being a value add, something familiar to you? So.

SCOTT

13:45 Yeah. Talk about.

SKIP

13:46 They, they approached you and... the kind of a requirements gathering as part of the sales process or presales?

SCOTT

13:58 Yeah, yeah. So I don't recall exactly all of the things they asked for. But... once we agreed and did a couple of demos, we actually had all of our... account managers and department leaders in the demo and they showed us, you know, all the functionality that everybody would use. And then they actually, once we signed with them, we agreed that this was going to be a good fit. We signed with them. They actually came to our office to review our processes, figure out... how our workflows would fit into how their system is designed.

DAVID

14:57 That, that onsite consultation was kind of like the kickoff for your onboarding process.

SCOTT

15:01 Yeah, yeah. That was, and we found that a couple of other local... mechanical contractors here are using that system as well. So that was kind of a big push for us as well.

SKIP

15:22 So, so they did not do that sort of requirements gathering deep requirements gathering you signing. They did demos and you did the pricing negotiation and stuff like that you signed. Then they came on and really understood or tried to understand your data requirements in that.

SCOTT

15:45 Yeah. So that was what was kind of frustrating about the service trade process was it was presented to us as here's the environment, this is where your system needs to fit. And maybe, I mean to be fair, maybe build ups was just, it was just a better fit in general where a lot of the functions that we were looking for looked... more like how we did our business anyway.

DAVID

16:23 So the feature set in functionality kind of from the user interface experience was kinda more comfortable and cozy based on the way.

SCOTT

16:32 I mean, it's it just seemed like a much smoother system to us. And so that was, I think one of the, one of the deciders and, you know, that it's got a mobile app that everything is in this one place. That was a big deal for that side as well. Is that whole mobile functionality with service trade is very cumbersome because, you know, we wanted time cards. We wanted purchase orders we want. And I'll all that you have to go here for time cards you have to do. And it works this way and it's a little, you know, it was, it just didn't have a good seamless integration feel to it... which we, you know, a lot of, I would say some of our service techs are kinda difficult anyway and having to, you know, I have to do it this way and then I have to go here for that. And then what do I do? And if I needed to do this? And yeah, it was.

DAVID

17:43 Yeah, better to keep the bumpers up in the gutters with the technician, that way, you're getting a strike every time and not a bunch of, I mean.

SCOTT

17:50 The ones out there, you know, in the field, doing the work. So we have to keep them happy.

DAVID

17:54 Yeah.

SCOTT

17:55 And having that all in one place... it's gonna be a big relief for us and for them, I think.

SKIP

18:09 That is, that is really important. Not only that department leaders can see that it's seamless, but that the folks in the field can. And it seems like at least in theory... that, you know, what they're saying is actual. Now, are they using it right now or what are you doing right now in the field?

SCOTT

18:29 No, we're still doing same old thing on paper.

SKIP

18:32 Yeah. Okay.

SCOTT

18:34 Yeah, we're not quite to that point yet. The training for the office, we still got a couple of trainings for the project management part. And then we're doing the field

guys training. So, and I think I don't recall if service trainer had a good project management module in it or not. So that was another piece that was a big, was a big deal for us. We have, you know, they're not huge projects, but.

DAVID

19:06 We have a couple.

SCOTT

19:08 Sometimes they get big, but, you know, the way that we've changed a little bit is, you know, kinda anything that's over a certain amount of hours we're calling that a.

DAVID

19:19 Rocect.

SCOTT

19:20 And so we've got a lot of small projects.

DAVID

19:24 Yeah, and.

SCOTT

19:26 Differently, you know, to see the costing the way that we want to see it is, it's very valuable.

DAVID

19:34 Absolutely. Yeah. We, we've heard that from the marketplace and we're actually engaging that. Right now. We've stuff coming out as we speak. It's I think last week is when we released our whip reporting against projects and there's more to come on that space as well. So, we know it's a part of the business for sure. You can't running little tiny service calls all the time, right?

SCOTT

19:59 Well, I think, yeah, a couple of months ago, you guys announced that there was a project module.

DAVID

20:06 It's actually...

SCOTT

20:06 It's...

DAVID

20:07 Within it now, it's not like a separate thing. It's kinda.

SCOTT

20:09 Yeah, I did the, I think I did the demo and... I don't remember, I don't remember being excited about it. That's all I can say, I don't remember it all that much but I mean, it was there and I'm sure it will keep changing.

SKIP

20:26 Well, generally speaking, you know, it's meant to address kinda your use case, not a big GC type project.

SCOTT

20:34 Yeah.

SKIP

20:35 The Aia billing it's meant to address smaller projects and have that inherent to the platform. So you can do whip reporting and budget management and change orders and things like that. So that is, you know, kind of we've introduced chunks of it over the last year. And big chunk in whip reporting is kind of been released to our early adopters. And so we're probably 80 percent there. But yeah. So that's kind of where we are.

SCOTT

21:14 Okay. Yeah. So our, the other folks here that are using... Northboundary, now, I mean, that was something that some of the folks that work here had used it in the past and that's how they kinda came up with that one as a good tool for managing the maintenance agreements. And that was, you know, that was one of those pieces that was lacking with service trade at the time, and you know, if you guys have a really good integration between the two, that will be key.

DAVID

21:57 But...

SCOTT

21:59 I mean, that's one of the things that we wanted to make sure that we had was, you know, everything that the office staff does can be done in that, whatever this one environment is. And then accounting is totally separate. And I know service trade was there. But... one of the things that Michelle was, one of the last things that we looked at was... I don't remember which I was trying to get reports that's what it was reports. And I think with service trade, there's a whole nother level to get the reporting. And that was, it's just Nicole and Diamond. You just every time you turn around, it's like, okay, well, now we have to do the purchase orders. Okay. Well, now we have to do the time cards and now we have to do the reporting is like, where does it end? That? That's it just starts eating away at.

SKIP

23:05 And you felt like with BuildOps, you know, you had kind of everything kind of packaged up together... and not sort of these different modules that you had to.

SCOTT

23:15 Yeah. So their time keeping their time cards is built in. It's part of the functionality of that system. The... purchase orders is all part of the functionality of the main system. It's there's no extra cost for that. And then the reporting is all it's the way that their system is built is that everything is basically reported on everywhere you go. It's like every time you turn around, it's... a table. Everything's in a table and you can view that table in lots of different ways and they have dashboards. It's all there. So... it does work for our business better.

SKIP

24:09 And, and have you, so you got the training setup to kinda get to office staff then PMS, then the field all trained on the platform. Have you been able to see your data in the platform yet? Have you been able to observe it? You know, beyond, you know, the demo kind of review of things.

SCOTT

24:31 No, we're in a test environment and we haven't imported all of our data yet. So that's one of the things is that some of the data can't be directly imported. Like our maintenance agreements. We're going to have to basically re, enter those into that system. And that's kinda why we're wondering, do we keep Northboundary for a while at least because, you know, there's not an easy import path or do we just go for it and move everything? So, I think at the... as far as I've been told right now, we're just keeping Northboundary because that's where stuff is that's where it's working and, you know, we're not quite live in the other system yet either. So it doesn't really matter. We're not moving at this point.

DAVID

25:28 Well...

SKIP

25:29 And, you know, I think the Northboundary probably addresses a little bit more than what BuildOps addresses kind of in house. You know, they have kind of full well, CRM capability, sales management capability for your sellers and, you know, an estimating tool that is built the industry, which is probably a little bit more in depth. I would think, you know, with that, you know, with the ability to kinda structure your assets and labor costs and things like that within the platform. So.

SCOTT

26:04 Okay. Yeah. I'm not. I just barely, I had no training in Northboundary, and last week, I just got a log into it. So I've just been kind of poking around in it. So I don't know much about Northboundary, I just know, you know, when I, when build ups showed us their maintenance management portion, and then I look at build ups like that makes total sense. It's very similar. So that's why... I'm not sure which direction we're going with that part. So there's probably some loss of functionality there because I mean, that's what Northboundary was made for.

DAVID

26:52 So...

SKIP

26:55 The integration with BuildOps and you all are using GP, is that what you're...

SCOTT

27:01 No, we're actually going to be going to Quickbooks. It's just... everything... David is probably familiar of hearing about our woes of what we're doing with our accounting system. And, you know, we wanted to move to whatever the web version or the newest version of dynamics or great planes, but it's just going to be a huge undertaking and we're just not ready for it. I mean, we've got, we've been trying to go to a service system for a while and hopefully this will be the one... we're all hedging our beds and hoping that this is the one, but having to do another conversion anytime soon is not going to be easy. And Michelle is all for, well, let's just use Quickbooks. That way the information is there.

DAVID

28:01 Yeah, it's...

SCOTT

28:02 Super easy integration for BuildOps. I mean, they have a couple of other systems that they integrate with and they, you know, they have an open API so they could do stuff, but.

DAVID

28:13 Yeah, I think Quickbooks was the first one that we ever established, you know, we knew market that would be the most common interface that people needed. So, Quickbooks desktop Quickbooks online. That was the plug and play integration that we had from early on in the days of service.

SCOTT

28:28 What's interesting with us too is, I think, you know, Michelle, Michelle's, background... is accounting. And so she doesn't like Quickbooks because it's too simple.

DAVID

28:42 Right. So.

SCOTT

28:43 That's that's where I think... her trepidation was too was, I don't want to go to Quickbooks because it's dumb and simple. It doesn't do everything that she wants it to or at least she can't wrap her head around how they do it versus how she's been doing it. You know, it's not her way. It's their, you know, when somebody's been doing something so long they don't like to change anyway. So.

SKIP

29:12 I get that.

SCOTT

29:14 How, how does...

SKIP

29:15 BuildOps do kinda like the parts and POS, and does that integrate in with the Quickbooks stuff theoretical?

SCOTT

29:24 Yeah. I mean, we, we're not doing inventory so, but the po, part of it is, I think it's kinda similar to way service trade did it. And the way that we're gonna use it is basically the tech can generate their own purchase order. There are... no real requirements except for them picking a vendor. They don't have to enter line. They don't have to enter a price, but they do have to take a picture of the Bill of lading or the invoice or whatever it is, right? And then they submit it. And then the purchase order gets generated. Okay? So then the office staff will then enter the lines. And then as they enter the lines, you'll see the profitability or the, you know, it'll start adding that to the invoice. So it's a little different, somewhat similar but the...

SKIP

30:30 Can initiate the text in the field and process.

SCOTT

30:34 Within the same app.

SKIP

30:37 Okay. Yeah. So they don't have to toggle between different mobile apps or anything like that. They're doing it in the same app. They hit a button, initiate po, got it. Yup. Got it.

SCOTT

30:51 It definitely looks pretty slick. Okay?

SKIP

30:55 You know, this is so helpful to us because, you know, we certainly hate the especially with mechanical being one of our target industries. One of two. We kinda service both fire and mechanical. We wanna know where we need to improve. We wanna.

SCOTT

31:15 The one other thing that comes up in my mind now, we're talking about this, one one of the things that, and I mentioned it was the preview, the invoice. So something that the technicians need to provide or at least need to know if they're doing it properly. And I remember vaguely in service trade, when a technician puts in hours or puts in an item, it shows the cost, it doesn't show the price. And so... and then when they put in hours, it doesn't show anything... I don't think. But then once they

were all done, they can't even look at the, you know, the, to see if they have the right items in there and it's all priced properly because I mean, the way that we do it now, it's all manual. So they know the prices, they know what everything, you know, they write it all out on a piece of paper. You know, here's my labor. It's 165 dollars. Now here's a service charge at 75. And here's you know, all these items and they'll total it up and say, let's see, you know, it was 200 dollars plus our markup and it's this. And then they have this piece of paper that's totaled with service trade. You couldn't look to see what your total was unless you generate the invoice. And so previewing that to us that's important. I don't know. I'm guessing not many other people have complained about that, but definitely important to us going from totally manual where the guys were very empowered to Bill and collect. And I guess if you're going towards... the commercial market, maybe not as important, which mostly we are now, but we still, you know, some people still like to see that upfront and we still have to, you know, COD sometimes so that's that was a big deal.

DAVID

33:32 And...

SCOTT

33:32 Then customizing that invoice being able to customize it because in Oregon, you must have the CCB number on your invoice. Your contractor number has to be on that invoice. And I know that the only sort of... customization you guys had on the invoices, was, you know, you could put a logo up there and then you can have some text boxes for.

DAVID

34:04 Terms or whatever. Yeah.

SCOTT

34:06 And that... to us wasn't enough. And even, you know, it's like, could you have a template just for this company? Yes, that's easy, but that wasn't something that we were told that we could do. We're like, nope, this is it, you could put it here or you could put it there. And that's some of it is that in flexibility and I get that, you know, this is a platform that hundreds or thousands of people are using. So customizing and individualizing for everybody is not always ideal for programmers. But.

SKIP

34:46 So that balance the balance of what's static and what, what's customizable, what, you know, all custom and you can't be all static. So it's a matter of that. Sweet, right? Yeah. Okay. Gosh, anything, this is so useful. I mean, it's painful to hear, you know, the, nobody ever wants to hear what we actually do use this information very, you know, this is going to be very valuable for us. Is there anything else that you can think of? Whether it's the sales process, the onboarding process, the product itself... that we can take back to the team?

SCOTT

35:34 Let's see... service types. You couldn't customize the service types. That was another thing on our list.

SKIP

35:44 Talking about lines service.

SCOTT

35:45 Lines. Yeah. Yeah, I think that's what you guys call the service line. Yeah.

SKIP

35:51 I mean, it's not user editable, but we do add service lines, half of our customers. But, yeah, so.

SCOTT

36:03 Yeah, those lists and what do I remember? There was... the, I don't remember which view it was? Where was it the dispatch or something? Where you go and you click on one of the views and you would have to select or say, okay, because you had this giant list of stuff every time that you wanted to view this one page that you had to hit okay on? I don't...

DAVID

36:34 Which...

SCOTT

36:35 One, it was... I thought it was a dispatch screen or something, but.

DAVID

36:44 Maybe whenever they're doing an inbound service call, selected what the correct service line was?

SCOTT

36:49 I don't remember, it was like a window that popped up in front and it just was a huge list of all the service services or service lines or something like that, but it wasn't on the creating a job itself. It was something else.

DAVID

37:05 Now, I'm curious.

SCOTT

37:06 I just remember, I'll have to go through and look, remember what?

SKIP

37:11 Job board or something the.

DAVID

37:15 Yeah, not scheduler.

SKIP

37:18 Sure. Do you have, do you have a service trade up?

DAVID

37:22 Yeah, I just right now.

SKIP

37:23 Yeah, sure. And maybe Scott could say, yeah, that one.

DAVID

37:26 Yeah... same, what have?

SCOTT

37:31 It would pop up every time you switch to it...

DAVID

37:34 Yeah, yeah.

SCOTT

37:36 Or review?

DAVID

37:36 Yeah, the map schedule that's what you're thinking of because every time you open up scheduling, it's gonna ask you what do you want your filter set to be?

SCOTT

37:44 Yeah.

DAVID

37:48 That's a like this office or whatnot before you open the entire?

SCOTT

37:55 Maybe seemed like it was more than.

DAVID

38:00 And then all those service lines as well.

SCOTT

38:02 Yeah, if I go all the...

DAVID

38:05 So, here's all the offices that are in this demo account, but then also you?

SCOTT

38:09 That's all we saw was all the service lines because we didn't have any offices. We just had one.

DAVID

38:13 Right.

SCOTT

38:14 So, it's like, yeah, if that would be a default that you could change somewhere or at least, you know, click on it somewhere later to say, I want to change it to do something else instead of every time you open up this window new.

DAVID

38:31 It's...

SCOTT

38:31 Asking for all of that.

DAVID

38:34 Yeah. And we've got everything activated in this demo account. So that's an example there for sure.

SCOTT

38:40 You know, for us, I mean, and probably a lot of the folks, they have a very narrow service line, you know, selection. And so, if you have to go through that every time and some things, if I remember some of the things that we did either weren't in there couldn't find them or didn't match the group for us, so it was like, well, drains, where was that? I mean, I don't remember what it was, but it was like, yeah, we do that too, but it wasn't there, so.

DAVID

39:13 Have you, were you guys wanting drains to be its own service line? This is something I've heard before, so.

SCOTT

39:21 Sorry, I missed that.

DAVID

39:22 Would you, would you consider drains to be its own service line or an asset?

SCOTT

39:28 It, it's a service line for us? Yeah, because we have guys that specialize in drains. Okay. Another one, what was the other one? I don't know if it's on, there was backflow, I know we've talked about that in our office, a lot lately. Backflow is a whole service line by itself as well. I don't know if that was on your list or not, but it's it was just something that came to my head because I've heard it a lot in the last couple of days.

DAVID

40:00 Yeah, backflow is definitely, it's gotta be, yeah, it is BF, is abbreviation.

SCOTT

40:07 And because we do commercial and residential, but primarily commercial, some stuff fits in commercial, some doesn't some, you know, it's all there's probably a little bit of both. And I guess for reporting, it sorta makes a difference. But, yeah, I mean, but one of the common themes that we're seeing now is that tags, those things are used kind of across the board. We're seeing that with BuildOps too. You know, where we, although we are able to put in lots of different customer types... location types. And I don't remember if service trade had all of those things that we were looking for. So we had to do a lot of tags.

DAVID

41:03 Location type being what, what's an example of a location type?

SCOTT

41:07 I think we had like industrial or multifamily or actually that would be, yeah, that would be a location, not a company type. So, so we had location types and then we had company types.

DAVID

41:22 Okay. Let me...

SCOTT

41:26 Actually... let me see if I can kind of decipher what we have... that I think was a little bit different from what we're we were seeing in service trade.

SCOTT

41:46 Come is my internet is super slow today or my computer.

SCOTT

41:56 Let's see. We've got... fields. So they have... customer property types and customer types, job types.

DAVID

42:16 And these types, I'm assuming just help you slice and dice the reporting in whichever way you.

SCOTT

42:19 Yeah. So for instance, our customer types are commercial residential, industrial institution.

DAVID

42:25 I...

SCOTT

42:27 And then customers, property types, restaurant, office, retail, hospital, hotel, mixed use, multifamily blah, blah, blah.

DAVID

42:36 Okay. So.

SKIP

42:39 And how does that happen in build ups? Do they have like drop Downs or, you know, you can assign those?

SCOTT

42:45 Yeah, those are drop down lists. Okay? And then you can have customer tags, job tags, invoice tags?

SCOTT

43:00 So, it's kinda just a little bit different way to slice and dice it, I guess. Yep.

SKIP

43:05 That informs how you see the report, see those represented in reporting? And you can, yeah, yeah. Okay.

DAVID

43:13 What's our performance in this portion of business and how we're approaching the marketplace and each one of the, yeah... okay.

SCOTT

43:22 Think that those are the big ones. I mean... the sort of like I said kinda Nicola diming you just to get all the features that you want. That's I would imagine you might hear more complaints about that. I would think, you know, it just because it's like, well, I mean, because this, it's common, you know, people use a lot of those features. So having them all just kind of built in and saying, you know, you get the whole suite. This is what it is, you know, that's a big deal which is kinda nice just to have it all. One one, it's all included.

SKIP

44:04 Yeah, it's like you've got packaging and, you know, we bundle them together and then you've got user experience where you're you know, accessing everything in a similar interface. So there's both of those kind of irritancs when it comes to kinda using things separately.

SCOTT

44:26 Meaning, unless you're just really pricing everything totally different, you know, different users have different levels which have different costs. But I don't know that in our case, that was... wasn't really talked about. It was like, yeah, we can do that. We can do that.

SKIP

44:50 When you compare the cost, BuildOps and service trade was last more.

SCOTT

44:59 Actually, I think it's right, very close. It's very close to what we're paying for all of the features that we were paying for. Got a service trade. I think we're pretty close. I don't know exact numbers right off.

SKIP

45:14 Yeah, no, it's good to know.

SCOTT

45:17 But the way they do it too is it's you're not licensing field guys versus non field guys. It's just everyone because any user can be a field user or they can be an office user. It just matters whether they have a web interface or not. And they can log in either way.

SKIP

45:44 Okay.

SCOTT

45:46 So, if a field user wanted more functionality for, you know, like what was one of the things field quotes, one of the things that BuildOps does is basically at the end of the job, it asks if this needs to be followed up with a quote, and then you can type in some basic information, but it's not, it doesn't allow the technician to do a detailed field quote. But if that technician had like a tablet or something and he had a web interface, then he could build a field quote... and there's no extra cost involved because he could do it either way, but typically, he would just log into the app to do his normal job. So it's not something that I think we were going to do, but if the field quote was built into the app a little bit more, which we're hoping that BuildOps will do as well... then that's something that, you know, it's like what is it with service trade? It's... it was, you had something in there, we.

DAVID

47:06 For field quoting on our side, it's...

SCOTT

47:08 It was deficiencies that's what it was. Yeah, there were some deficiencies. Yours was a little bit. It allowed you to add more information where BuildOps is not. They're just basic note, but it does... flag the job and then you can find those listed somewhere saying somebody said that there needed to be a follow up quote. And then you could, you know, check that dashboard view, whatever it was and see if somebody followed up on it where it came from. You know, they're all kind of linked together. Yeah. And the other thing was, and maybe this is something that you guys are talking about already is... when somebody goes out on a maintenance agreement, associated job and... a quote comes from that, it either links it to the original service agreement and shows how it came about or you can add... I think you could add items to it based on the, if you've got a, if the maintenance agreement includes, you know, TAM or whatever it is, then it would be billed out at that rate, whatever it was, if it was kind of at the same time.

--- Pricing ends ---

DAVID

48:43 Yeah. So the agreement informs the way in which you're going forward.

SCOTT

48:46 Yeah.

DAVID

48:47 Yeah. Yeah.

SCOTT

48:49 So, it does keep all those links, all those things linked together so you can find out how those things came about.

SCOTT

49:02 Yeah... I think that was, I think of right off hand.

DAVID

49:09 Well, you, yeah. So super appreciative of that information because like Skip said, we are very focused at this and having feedback and information gives us the ability to make sure in the right place and doing what we need to. So, thanks again for everything.

SKIP

49:28 One more question using forms and integration and BuildOps, you know, form, you have something that's you know, already pre populated, how does?

SCOTT

49:43 Yeah. So they actually have two ways of doing forms. Either... you can upload a fillable PDF and then basically on a job, you can, as a dispatcher, you can add a form to a job or the technician can pull a form from any, the existing list of forms.

DAVID

50:12 So, the admin can almost assign what's available. So that way it's just there for the technician.

SCOTT

50:16 Yeah. Or they also have a custom form maker. So it doesn't look like a PD, you know, because if you add a billable form, yeah, you have to stretch it out so you can type in it, but they actually have the ability where you can custom build the fields of your form.

DAVID

50:42 Huh.

SCOTT

50:42 In an app friendly way?

DAVID

50:44 Yeah.

SKIP

50:46 So, in a mobile on a mobile device?

SCOTT

50:49 Right.

SKIP

50:49 No work better.

SCOTT

50:51 Where basically, it's just a list, right?

DAVID

50:54 Rollable in.

SCOTT

50:55 Fields.

DAVID

50:56 Yeah.

SKIP

50:57 Is there conditional logic and things that can be built in the form builder? Or is it just kind a simple drop down?

SCOTT

51:05 I'm not sure. I haven't been showed that yet. I just kinda played around in and saw that it was there, but they have the ability to do that. Okay? The other thing... I think... with BuildOps... is I know with BuildOps, there's actually a list basically on a job that you can... tell the technician that these are the required things that have to be completed... but they can, you can allow them to bypass them. But basically, they have to go into it and say, no, I don't have any items. Yeah. So they are required fields for them to at least address?

DAVID

51:57 A response is at least, yeah, yeah.

SCOTT

52:07 Know if there was anything for the jobs... I'm trying to remember there's a lot and then I try to remember how a service trade do it. How did this one and who did it that way? And who?

DAVID

52:22 Yeah. Scott, if you could just give us a complete overall operations, how technology fits within it that'd be great. Thanks.

SKIP

52:30 I'd say your memory works pretty well, so.

SCOTT

52:34 Okay.

SKIP

52:35 And you work directly... for them or are you consulting for?

SCOTT

52:42 I am an employee.

SKIP

52:44 Yeah. How long you been with the company?

SCOTT

52:46 Well, I was actually with the company about eight years ago for about a year and then I came back a little over a year ago.

SKIP

52:58 Okay. Well, I'm sure they're glad to have you because it sounds like you're doing a lot of good work for them and we hope we can, I know we're running up almost an hour here, but I know that we'd love to keep you on the Northboundary side and certainly want to keep the door open. We obviously did a lot of work to get you guys almost to the mark and we'd like to keep that door open. I think you there, like I said... you're in contract until August, but, you know, we want you to be successful. And so if there's ever any... reason to consider coming back, we'd love to have you welcome you with open arms. We like, we don't like to burn bridges. We like to keep.

SCOTT

53:53 Yeah.

SKIP

53:54 Nice functional possible and attractive too. So we hope you'll consider us going forward and we appreciate this kind of dialogue. We're very open people ourselves and transparent. So it really helps.

SCOTT

54:12 Yeah. I mean, you know, like we were excited, we were excited about service trade when we first started and then, you know, it just became something that was, there was enough things that were just too difficult for us to overcome. So, I mean... it's not you, it's me.

SKIP

54:37 Guess is that with that... it's always got both. We've got improvement opportunities that you and, you know, this is gonna go to our product team and it'll help inform how we can do things better, you know, a space, but certainly like I said, wanna keep the door open and Scott, you've been such a, you know, spend an hour with us right here. Talking about this is so helpful to us.

SCOTT

55:08 Yeah. Well, thanks for calling and setting this up and we'll just make sure that Northboundary, if we keep using that, we'll be happy with that. Yeah.

SKIP

55:20 And speaking of which, if you need more of a deep dive kinda look at the at Northboundary again and you want us to get events or somebody else to kinda walk you through it, let us know. We're glad to set that up for you.

--- Wrap-up ---

SCOTT

55:34 Well, I think in the beginning, I know everybody was really excited to see it and, you know, like I said, we've had other people that used it before and they communicate directly with Vince already. So everybody knows what needs to be done here or how to get it, how to get the information they need. So, yeah, we're good.

SKIP

55:58 Okay. Well... we're going to remain in, you know, relationship with the Temple, and we want you to know that you can call on David or me at any time for anything and so, appreciate the.

SCOTT

56:12 All right. Well, thanks, you guys. We'll talk to you another day.

DAVID

56:16 Okay, thanks.

SCOTT

56:18 All right. Thanks bye.

SKIP

56:19 Bye.

The End