



# ServiceTrade Demo with Mahlon Mechanical Services

Alec Ashby with Mahlon Mechanical Services  
Recorded on 11/14/23 via Zoom, 1 hour 28 min.

## Participants

### **SERVICETRADE**

Alec Ashby  
*Territory Manager*

Tommy Polcari  
*Associate NorthBoundary Account Executive*

### **MAHLON MECHANICAL SERVICES**

Dave Johnson  
*Principal*

### **OTHER**

Phone Caller #2

Phone Caller #1

16164665741

# Topics

<i>Call Setup</i> .....	0:00
<i>Pricing</i> .....	12:27
<i>Pricing</i> .....	21:05
<i>Call Setup</i> .....	51:25
<i>Wrap-up</i> .....	1:11:10
<i>Next Steps</i> .....	1:26:55

# Transcript

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

--- Call Setup ---

PHONE CALLER #1

0:00 I don't know if...

ALEC

0:00 Your Mike's not working or if it's me or if you're joining in by phone, but if your Mike doesn't work on your computer, you can always join in by phone... so I can send that in the chat.

ALEC

0:44 Hey, Dave, can you hear me now?

ALEC

1:51 I'm gonna give you a ring just to make sure everything's okay. I don't know if you're... hearing me or not or maybe it's me. I don't know, give me a sec.

ALEC

2:18 All right. Can you hear me now?

PHONE CALLER #1

2:21 I can hear you now. Audio was not coming through your Zoom there.

ALEC

2:25 Okay. Yeah, that's weird. Yeah, I apologize for that. How are you doing this morning, Dave?

PHONE CALLER #1

2:31 I'm good. How are you?

ALEC

2:33 Doing good, doing good. Are you guys, how, how's the holiday season for you guys? Does that change things for you guys get busier less busy or?

PHONE CALLER #1

2:42 Yeah. I mean, it's we're steady right now. Should I be seeing something on the screen here? Because I'm not seeing anything on the screen?

ALEC

2:48 Yeah. You're good. That's weird. Yeah, you should be seeing me. So, you're not seeing me?

PHONE CALLER #1

2:58 No, I see the Zoom screen.

ALEC

3:02 That's interesting. Let me just, let me just try something real quick. Are you seeing this?

PHONE CALLER #1

3:13 I... just closed out of it. I'm just gonna try to reload it. Okay. Literally, all I'm saying is the Zoom screen, which is very helpful to learn how things are working.

ALEC

3:26 Right. Yeah, I'm sure you joined the demo so you could see the product, not just talk to me. So I get it. All right. Let's try this. Let's see if we can get it to work this time. So, right now, I'm just sharing the screen just to make sure you're seeing what seeing.

PHONE CALLER #1

3:42 I got it. No.

ALEC

3:45 Okay. Sweet. Well, happy. We're settled in here now. Well, Dave, just to introduce myself, my name's Alec. I'm an inside territory manager here. I've been here for over a year, so I talked to commercial service contractors every single day. I got some pretty good notes here from Tommy, but really the beginning of this call, I just want to get a better sense of what you're looking for, what your goals are, where you guys are going once I get a better idea of that, and then we'll hop into the platform. And then if you like what you see, we can talk next steps from there. Does that sound good?

PHONE CALLER #1

4:16 Yep. Sounds good.

ALEC

4:18 Okay, sweet. Yeah, you know.

PHONE CALLER #1

4:20 Tommy told...

ALEC

4:20 Me a little bit about you guys. Seems like you've used Jobber before or you're using Jobber. Now you've used service tight in before, seems like pull-through work. Optimization is pretty important to you customer experience a lot.

PHONE CALLER #1

4:36 Lot of stuff we...

ALEC

4:36 Do well, quite frankly. But really just what I want to get a sense of is out of all the, you know, maybe problems you have with your workflows, what's kind of the most urgent workflow problem you have that you're looking to? Really? Because it seems like you're looking at a couple of other softwares. What are you really trying to solve here? What are you really trying to accomplish? Because like I said, I have a good sense of what you're looking for based on what Tommy told me, but I just want to get a sense of what's like the most important thing for you?

PHONE CALLER #1

5:04 You... right now, what I, did your screen go like disappeared again?

ALEC

5:13 Yeah, I stopped sharing my screen, but you should be seeing.

PHONE CALLER #1

5:17 Me.

ALEC

5:18 If, if not, if we, if I share my screen, I can share my screen again.

PHONE CALLER #1

5:23 You're fine. I just wanted to make sure I knew what was going on.

--- Call Setup ends ---

PHONE CALLER #1

5:25 Okay? So when I came on board here to mail it mechanical about a year ago, we were still using kind of excel spreadsheets and paper tracking of service scheduling as well as installing bigger job scheduling. So to try to integrate them into more of, a digital scheduling, I got them on board with the easiest one I could think to use, which was Jobber, that's the one I started out with. I don't know 12 years ago when I had my own business. And then through the progression, you know, you kinda realize that Jobber, is a good scheduling tool, but... in depth, it doesn't do the things, that you really wanted to do. There's no price book. There's no real client portal.

There's I mean, there's no, there's it's basic, right? From Jobber, I went to HouseCall, and then from HouseCall with the service tighten because each one had more of the features that I was looking for, but those are primarily designed for the residential world. And I was looking for something that was more geared towards commercial because, you know, we've got customers that operate large facilities that are gonna want to have integration where they can drop in on a portal and see what did we do? What did it look like? What's the right up on that? So they can have all that information access from one point rather than have... carbon copy, handwritten whatever, and then receive a Bill, you know, 30 or 45 days later. And it just, I mean for who we are and the client tell that we work with, it needs to be less 19 eighties and more 2023.

ALEC

7:21 Gotcha. Yeah, we can definitely, you know, we're only work with commercial service contractors as I'm sure you saw on our website. And yeah, we can definitely help you bridge that gap of 50 years or 40 years. I should say now, I know that it seems like the portal is definitely kind of the main thing that's on your mind with you guys not having a portal? What issues is that causing? Is that client satisfaction? Is that people not renewing for PM contracts? Like what are the kinds of ramifications you've noticed for you guys not having a portal?

PHONE CALLER #1

7:53 I mean, it's just, it takes longer to access the information, right? So, we've got to go through paper service contracts and go through Sage to figure out what we build them for, and what did we list on there that we built them for? And it's just, it's a multi step process that should be more direct. You should be able to just type in the customer information, pull up what the last service call was and be able to both us and, the client take a look and see what it is and be able to point out, hey, here's, the picture. Are you looking at it? Great? This is, this is what we see. This is what we think that it should be done rather than going through again a paper invoice that doesn't have any pictures that only may or may not have equipment model and serial number. And then our recommendation, you know, being able, to see what it looks like during the conversation, I think translates to a better conversion rate, on what we're trying to do, to improve the situation for the client.

ALEC

8:51 Right, right. And do you guys ever have issues of like outstanding Ar? I know in the residential world, it's typically upsell in the driveway, you know, sell right then and there, but in the commercial world, sometimes it can take longer to get paid. You guys ever deal with outstanding Ar by chance?

PHONE CALLER #1

9:08 Yeah, I mean, to a certain extent, but, you know, we've got an accounting department here that does pretty good follow up on that and with the usage of Sage, I think that, you know, with, the reminders, and like I said, with and receivables department that goes through, and tries to keep it dialed in. I think we've got that relatively under control. So, what, you know, what we'd like to do is engage, the client a little bit more and then engage perspective clients a little bit more because, you know, there are thousands of companies that do what we do. But... the edge that we have is that we are one of the largest geothermal companies as well. So, you know, in trying to attack that segment of, the market a little bit better, you know,

we've got our foot in the door with a number of places, but I wanna show them that we're you know, we're up to date with today as well because anyway, it's thinking geothermal is probably a little more advanced, in what they expect to see as far as service return. I wanna know what's going on, and be able, to access it with a push of a button and not see us flip through a folder with paper in it that's it's projecting the wrong thing, and... it's putting doubt, in the mind of people that doesn't need to be there.

ALEC

10:30 Yeah, no, I get that. So, yeah, I mean, if you guys were able to have a portal and able to have a system that really help, you know, give your customer kind of that Amazon effect, so to speak, what do you think that would do for your day to day? Is that just more revenue? Is that more confidence in the sales team? Like what do you kinda envision if you had a system you were confident in that could deliver that?

PHONE CALLER #1

10:52 Well, you know, obviously we're hoping that it would improve our ability, to sell service contracts, and items like that moving on down the line. But I think for, the tracking purposes of, it keeps everything organized and allows the service tech, to have a better grasp on where we've been and what we've done... you know, that's good.

ALEC

11:12 Yeah, absolutely. And then, you know, I know you said they're you know, selling more service contracts. Is that one of your guys goals or do you guys have any other goals as well or?

PHONE CALLER #1

11:24 You know, it's it. I think it all starts with service, you develop the relationship and then you can move on to the projects that the client has versus trying to blind bid, and get in with somebody that doesn't know you from anybody else.

ALEC

11:39 Right. Yeah, no, you know, having your truck out there, your guys out there and especially if you use something like service trade, then, you know, them kind of getting a feel for what it's like to work with you because I think what you're getting at is you guys don't seem like a company that wants to compete on price, you want to compete on value. That's what a lot of our highest performing customers wanna do as well. And that's kind of how our platform was designed for you guys to sell a premium product at a premium price or premium experience. I should say now, if you guys projects, I know I saw that in the notes from Tommy. Are those for you guys like GC projects, owner projects? Like how long do those typically take? Like, what are those kinds of look like?

PHONE CALLER #1

12:20 You know, they vary. We've got a couple of, well, we've got one project that is gonna run out for another year and a half.

PHONE CALLER #1

12:27 We've got another project that will hit heavy here and maybe about a month and that will run out for the couple of months after that. We've got one that we've been involved in for, you know, the last three or four months. So, you know, it really varies just depending on the scope, of the project. When we start there's. Some that are, you know, a couple of weeks long or some that are a couple of years long.

ALEC

12:50 Gotcha. Okay. Well, just to let you know, so service trade, we can handle owner projects up to seven months. So anything that takes one to seven months, we can track things like, you know, work in Progress a budget, you know, do phase billing, all that good stuff. Typically when it gets outside of like seven months and we're looking at like Aia billing or working with a lot of GTS. Typically, we refer our customers to something like a pro core that's more designed for those Construction projects, but we can absolutely handle those like weekly to monthly, you know, owner projects where there's you know, moderate complexity.

PHONE CALLER #1

13:29 That makes...

ALEC

13:29 Sense. Do you guys do a lot of AI billing or is it mainly just Progress billing or phase billing or?

PHONE CALLER #1

13:39 I mean, we do both really, it's it really depends on the project. You know, if we've got a big school Bond project then, you know, it is what it is, but they're you know, like I said, we've got a couple of smaller projects that we do too where we can get in and out in seven to 10 days or, you know, two or three weeks. It just all depends on the amount of labor, and at what pace they want us to move at. Okay?

ALEC

14:04 Okay. Gotcha.

PHONE CALLER #1

14:06 I guess my...

ALEC

14:07 Like process oriented question that I have for you is, you know, a big part of service trade and one of the ways we're a lot different than a lot of the platforms out there is the pool through work. So your guy goes out to a PM, he identifies repair opportunity. Maybe your guy reports that to your service manager, and then he quotes it out or something along those lines. How, how does that process kind of look like right now? And where would you kinda like that process to be? Because I'm



sure, you know, based on the notes with Tommy, it seems like that's you know, big thing. You're also looking to improve. So just curious on maybe how that looks now, how you would like it to look.

PHONE CALLER #1

14:45 Yeah. I think right now, what happens is the tech goes out, identifies the issue. Then it comes back into the service manager who then figures out what it's gonna take and then prices it up. And then from that point, it sells it back to the client and then we order and reschedule and then complete the work. But ideally, you know, if we know what it takes and we can put a price multiplier in there based, on the cost from the vendor. Then potentially the tech on site can go. Okay. Well, this is what it's gonna take to fix it here's. Where the problem is and this is what it's gonna cost. Do you wanna move forward so that we can cut out, you know, a day's worth of steps and cut right to the Chase and, you know, order from the vendor, and be able to either get it the same day or get it whenever it shows up depending on the availability, of whatever it takes, to fix the situation?

ALEC

15:37 Gotcha. Okay. And I mean, on average, how long would you say it typically takes just a couple of days or I mean if you were to take a guess at it, how long do you think it takes?

PHONE CALLER #1

15:47 Yeah, depending on the complexity of the repair, I mean, it can be done same day or it can be done if the part comes in a day or two, but, you know, just if the service manager is not in and is unable to process the order until the next morning, then, you know, we've lost that time.

--- Pricing ends ---

PHONE CALLER #1

16:03 And then if it takes another day from that point for, the item to come in, then it's another day. So, you know, if you can speed up the overall time line, then I think that there's more benefit to the client at that point. Okay?

ALEC

16:19 Yeah. And I was at...

PHONE CALLER #1

16:20 Ally, talking to a company.

ALEC

16:22 Yesterday that uses Jobber for the same thing. And what they were telling me is that basically the technician has to put it in like a comment. Maybe this is just the way they're doing it. I don't know. And then the service manager would have to review the comments, but there was not like a designated like section on the work order for repairs. Is that similar to you guys or do you guys do it a little differently?

PHONE CALLER #1

16:48 I would love to say that, our text whether they're install or service are using the comment section in Jobber, but most of the things are getting related via text or be a handwritten work order. And that's what we're really, we're trying to get away from that because, you know, it's just a matter of time before a handwritten work order gets misplaced and something doesn't happen and the repair doesn't happen. Then, you know, what happens from there.

ALEC

17:14 Right. And you know, that's you know, high margin worked as well as what you were kinda saying earlier. You kinda want to have that premium experience. You know, losing, you know, work orders doesn't help with that, but you're not the first one that's told me that. So there's no worries there, and.

PHONE CALLER #1

17:29 Anything else?

ALEC

17:29 Important to you in regards to functionality that we haven't gone over so far? I think I have a pretty good idea of what you would want to see today, but just wanna make sure I'm not missing anything.

PHONE CALLER #1

17:41 No, I mean, I would love it if, you had an estimating software that had trace over feature and things like that, but I think that's a completely different program provided by another vendor that we would have to look at. So I think for the purposes of this conversation, anything that can help streamline our dispatch tracking and then overall customer experience from their point of view is gonna be our main focuses.

ALEC

18:06 Okay. Yeah. We can definitely focus on that. Now, when you say estimating software, are you referring to like estimating for new Construction projects or estimating for like PM proposals or like, what?

PHONE CALLER #1

18:20 I guess, I mean proposal, is pretty simple. You can just outline it, in a narrative but, you know, when you're doing an estimate or an estimation for a design build or an estimation for, you know, for a major school, but project... you know, it's going to be a lot more complex than just a narrative because there's going to be more work that goes into it specifically addressing the plan, and items within, the detail. Gotcha. Yeah. Well.

ALEC

18:53 Just to, you know, some customers start out with it, some grow into it, but we do have a tool. It's a company we acquired last year. It's called Northboundary. That tool is designed to, you know, help your sales staff, you know, create those accurate

proposals and make sure that all the costs are correct. And then, you know, send it out stuff like that. In the interest of time. I'll send you some like videos in that and a recap e-mail if you like what you see today. And if you want, we could take a deeper dive with that or you could just grow into that in the future. But that is something that we offer now depending on the level of complexity of these proposals, that might be something that I need to get my technical team on just to make sure that's a fit for what you guys do, but that is something that we do. So we did acquire that company. I could definitely send you some stuff about that?

PHONE CALLER #1

19:43 So, this Northboundary because I'm looking at it while you and I are talking, is that more of a CRM then? Well, I...

ALEC

19:52 Component, but I'd say the main value proposition is the proposal side of it. So creating accurate proposals that you can send the client. But there is a CRM component where you can see win rate stuff like that prospecting activity, if that's important to you as.

PHONE CALLER #1

20:11 Does service trade have a CRM component in it? So call.

ALEC

20:18 Service trade. So basically, we're a field service management platform first, you know, work orders, customer portal, you know, stuff like that quoting invoicing, you know, that's kind of our a one thing I'd say we're a light CRM so you can track, you know, when customers are up for renewal on their PMS or what contacts are on this account. But as far as like, you know, sales and stuff like Salesforce type stuff, you know, service trade is not that, but once they're a client, there is some like light CRM function.

PHONE CALLER #1

20:48 ServiceTrade... so then I... don't know if this is... must be in service trade pricing. I was just in Northboundary.

--- Pricing ---

PHONE CALLER #1

21:05 So I'm looking at service trade dot, Northboundary. It's all listed service trade and this is pulling up for me the sales management software. So I'm guessing what I'm looking at here is Northboundary. So when I hit pricing on that, is that the Northboundary pricing which is 89 dollars on the select program per month per technician?

ALEC

21:31 A separate add on product and that's priced that's a totally separate thing for pricing. But the way the simple way to think about it actually, if you give me a sec, I

can pull this up real quick. I'll kinda this slide should help you kinda understand. But in short, like Northboundary, the way you can think about it is Northboundary is new customer. So everything you're gonna do in Northboundary is like we're trying to acquire new customers and service trade is, hey, they are customer. We're just trying to manage that relationship and maximize the productivity or the profitability I should say of the contract. So like this just kinda gives you an idea. I could send this to you as well. But this is just kinda the major differences between Northboundary. And so.

PHONE CALLER #1

22:19 Trade? Okay. So this is basically your version of Salesforce or something along those lines, yes.

ALEC

22:25 So...

PHONE CALLER #1

22:26 It's it's a.

ALEC

22:26 Mechanical specific CRM. So if you were to, you know, obviously Salesforce is very expensive, but Northboundary is actually a company that's been around for about 30 years and it's a mechanical specific CRM. Like I said, if this entices you, I can definitely, I'm not the technical expert on that product. So I could definitely set up a follow up demo to go through that. But essentially, you know, it's designed for, hey, you hire a salesman that has mechanical experience but isn't as well versed in sales, it can help them out or if you hire a salesman that doesn't know much about, you know, filters size and belts, it can work for them as well. So it's yeah, in short, it's a mechanical specific CRM.

PHONE CALLER #1

23:08 Okay. And is that pricing starting at 89 dollars per month per tech that's on it?

ALEC

23:16 No, so it's completely different. So, I mean, how many sales users do you have?

PHONE CALLER #1

23:22 We would have, I don't know two or three.

ALEC

23:25 Okay. Yep. So it...

PHONE CALLER #1

23:27 Starts out.

ALEC

23:28 At, it starts out at three sales users believe off the top of my head, it's so we built annual for all our plans. And I believe off the top of my head, it's 1,180 dollars, something along those lines per user. And there's a, every plan on Northboundary. Starts at three users. So like I said, some of our customers start off with that and service trade, some buy Northboundary without service trade. You know, there's all kinds of ways you can do it there. You know, you can buy a separate, you combine together and they will talk to each other. So, the idea is if you sign someone up in Northboundary, you'll be able to export it and push it over to service trade. So all the tasking PM, frequencies and all that good stuff. The idea is that you won't have to double data, enter that stuff in.

PHONE CALLER #1

24:18 Yeah, you build it Northboundary, and then you manage it through service trade.

ALEC

24:24 Correct.

PHONE CALLER #1

24:26 So, when you said 1,100 dollars annual per person or does that include three people?

ALEC

24:32 So, no, that's per user and there's three people. So in short for people in their first year, Northboundary runs about 5,000 dollars slightly below that. That includes onboarding, and then your three sales users. And then as far as recurring cost is about 3,500 for your three sales users. So onboarding it's just a one time cost about 1,400. And then it's 3,500 each year for Northboundary. If you're on three sales users and, I could send that in a quote that's a little easier for you to consume, but that's just kind of what you would be looking at.

PHONE CALLER #1

25:04 There. Okay. So then let's go back to service trade since that was where we originally started talking before we went off the rails here.

ALEC

25:13 All good, man. And then just one quick question before we get into it here. Dave, I did you here's, the principal of the company. I just wanna make sure, is that correct?

PHONE CALLER #1

25:22 I am the operations manager.

ALEC

25:24 Here. Okay. No worries. And then if you like what you see here today, who else would need to get involved? Just so I know.

PHONE CALLER #1

25:35 I would probably loop in mail, and Courtney after that?

ALEC

25:40 Okay. And I'm assuming they're the owners.

PHONE CALLER #1

25:44 Mail and general manager, Courtney is vice president.

ALEC

25:48 Okay. Gotcha. Cool. Well, we might dive into them a little bit later but in the interest of time, let's just go ahead and get into it here. So I'm just gonna kinda give you a high level, you know, just background on our company here. So what I kinda plan for us to go through today is the customer view. So seeing the customer portal, I'll show you some quotes, invoicing, invoices, what all that looks like? Then we'll hop out to the field, make sure the mobile side works for you. I know you want to get off paper and you want your guys in the field to streamline things a bit. So I'll kind of focus on that. And then if we have time, we have the, you know, office view. And then if we really have some more time, maybe I could, you know, show you a little bit of stuff in Northboundary, like I said, I'm not the technical expert on that product. But if you wanted to, we could dive deeper into that. But essentially Dave, what we understand here at ServiceTrade is that there's a 40 percent shortage of technicians in the workforce, basically meaning that every single year there's an eight percent loss of text in the workforce. This is mainly due to younger people not going to school for the trades and older folks retiring from the workforce. And essentially what this means Dave, is that the gap between the amount of work out there and the text you have on staff, that gap is growing every single year. So a lot of people that come to service trade to control costs similar to you, right? You wanna streamline your operations and set up your technicians for success. You told me a little bit about some of the paper issues or how some of maybe the repair opportunities are slipping through the cracks as well as just simply putting, you know, thing you from a 1980 to 2020 company. And we can definitely do that, you know, just like a lot of other companies can.

--- Pricing ends ---

ALEC

27:29 But the way we kind of stand out as we can help you grow that quality revenue keyword being quality. And basically what that means is that you don't wanna work with everybody in town. You wanna work with the high margin customers, the customers that pay their bills easy to work with. And I know you mentioned that you'd like to sell more service agreements that's something that we prioritize as well and essentially just helping you grow profitability, whether that's from the, you know, portal or whether that's from you guys, you know, having a better system to manage your clients, this is gonna help you all grow quality revenue. But I don't

know if you were saying something there, if it was just my Zoom, but was there anything you were saying there?

PHONE CALLER #1

28:11 No.

ALEC

28:12 Okay. Sweet. And then, Dave, you know, basically here, this is just kind of the major ways we stand out. I'm sure you're looking at quite a few platforms and it's easy to think that they all kinda do the same thing. And, yeah, there's a lot of things that are pretty similar between these platforms, but these are in, I'll...

PHONE CALLER #1

28:31 Be honest with you. I'm looking at you, and BuildOps. I mean, those are, the two that seem, to fit our E, the best, on what we're trying to do.

ALEC

28:39 Okay. Gotcha. So you just narrowed it down to those two. Okay. What do you kinda think of BuildOps? How did that one go?

PHONE CALLER #1

28:49 They relate to their Zoom meeting. So I hung up.

ALEC

28:53 Wow. Yeah. Sorry to hear that man. Okay?

PHONE CALLER #1

29:00 We'll see what they have to say on, you know, on their next attempt, but we're being a veteran on, do you think that they would be a little more punctual?

ALEC

29:11 Yeah, yeah, no, and full transparency. I've never been in the military but I mean I can show up to a meeting at nine o'clock... but yeah, no, we'll, yeah, we'll tackle that when you talk with them. But, yeah, okay. Good to know. So essentially, just so you know, Dave, these are the major ways that we stand out. So at least on the service trade side, it's managing those PMS and delivering on those PMS whether that's the pool through work or just the customer experience equipment tracking. So we'll give you the ability to track multiple pieces of equipment and you can track history, repair, history, quote, stuff like that higher margin work. So basically, you know, we kinda talked about how maybe some of these pull through opportunities are slipping through the cracks, you know, kinda optimizing that workflow. So I'll kinda show you that today. And then it seems like this is your main priority which is awesome is customer communication and value demonstrations. So not competing on price, competing on experience. And we'll definitely get in the portal here in a sec... very brief here. These are just the various parts of the business that we can affect. A, a, not going to bore you with just going through these individually. I'll just kinda show you

a lot of these things. But this is just kind of a high level understanding of how we can kind of affect the various areas of your business. And then as far as the slide here, basically, we only work with commercial service contractors. We've been in business now for over 11 years. This slide is slightly dated. We work with over 1,000 commercial service contractors between the US and Canada and we have a 95 percent customer attention rate basically meaning that if 10 companies sign up with service trade, nine stick with us long term. One of the big reasons that is that we have a very structured onboarding process. You know, there's a lot of software vendors out there that I'll tell you can go live in two weeks or no over promise on that end. But we're pretty clear about our expectations and pretty straightforward with our onboarding process. So that's definitely one of the big reasons and there's some other reasons as well. But before I get into it here, do you have any questions or anything on that before we get into it?

PHONE CALLER #1

31:23 Not at the moment.

ALEC

31:24 Okay, sweet. So if you have any questions about anything, just feel free to interrupt me. But essentially, here I'm gonna start off at the customer portal since it seems like that's the most important thing to you. We have three major views. We have the office, the tech and the customer. I'm starting off in the customer view in the portal. Now, this portal is a Wordpress plugin. I did a little bit of research. Seems like you guys are using a Wordpress website, so it should be a pretty seamless plugin. Okay. But essentially, this is what your clients gonna see right when they log in. So there's essentially three major tabs. So the first one is the service overview. So they'll be able to see what jobs are going on today. We can also see what jobs are upcoming. Cool thing about this portal is it's very hyperlink friendly and I'll kinda show you some of these things later. But for example, this is a service link. This is something you can send before the job during the job. After the job. It's a live link that's just a job report. So what are we doing? What pictures are we collecting? The idea? Is we're giving the client all the visibility you want them to see? And this is something you can send individually. But if your client goes in the portal, they can see that as well.

PHONE CALLER #1

32:43 And that's sent as a hyperlink to the customer via e-mail.

ALEC

32:46 Yep. You can send it via e-mail when you're working in service trade or if you want them to see it in the portal, they can see it if they click on the job number.

PHONE CALLER #1

32:55 Got you.

ALEC

32:58 And they can also see recently completed jobs. I know you kinda mentioned a little bit earlier that, hey, we wanna wait for customers to go in and just pay these invoices. You can absolutely do that. So if they click on this invoice here... there'd be



a little pay now button right there and they can pay right there with AC, H or credit card. You're obviously in control of how you wanna format it. So do you want it, TAM, do you want a grand total stuff like that?

PHONE CALLER #1

33:26 Yup.

ALEC

33:27 And then in these invoices, the service link is automatically in there. And the idea is that they're not calling your office back. So you're not having to go through your Sage and answer why it costs this much. You can kind of show them pictures work. Acknowledgments all the detail they need. So that paying the Bill is no brand.

PHONE CALLER #1

33:47 Perfect. So.

ALEC

33:51 So going back here, if we go here to locations and assets... basically here, you know, your client can go in and look up any asset they have in the system. There would also be a list here as well. This is, you know, demo account. So obviously, it's you know, kinda different than what it would look like in real life, but in real life would just be the assets they'd wanna see... you go.

PHONE CALLER #1

34:19 With that asset allocation there, are we able to then tie in, the belt information, the filter sizing and quantity information right to that asset?

ALEC

34:28 Exactly. Yep. So you can tie as much or as little information as you want. So you can do filter size, filter, quantity belt size, warranty date, install date. It's up to you on how much information you want them to see. Are you guys tracking that information right now or how's that kinda going for you guys right now?

PHONE CALLER #1

34:49 It's fairly remedial with Java. You can list, the assets that are attached to the site. So, you know, let's say that it's a furniture store and they've got 12 RT. We can list the model serial number, and then the number of filters and the filter sizing. But it doesn't I mean it's it unless the tech, is fairly savvy with using Jobber. It's tough to figure out on site on the mobile app, what, the filter account and sizing is per individual asset?

ALEC

35:29 And is that just result and just phone calls back to the office? Just general inefficiency or what's kind of the?

PHONE CALLER #1

35:36 Sometimes, I mean, we have an excel spreadsheet for some of the larger places that itemize the filter accounts, and what they're going to need. But it would be nice, to start limiting the number of excel spreadsheets that we have because the software should be able to track that information and that information should be accessible immediately for the tech that's on site.

ALEC

35:57 Okay. Gotcha. Yeah. So I'll definitely show you what that looks on the tech, and the office, and for you guys internally in a sec. But as far as how it looks for your clients. So, for example, I have a cosco Atlanta here, your person from cosco Atlanta. They can request service for this specific location. They can even request service for a specific asset if they know what the issue is. And then, you know, basically here, they can see all the assets they have.

PHONE CALLER #1

36:31 Go through the portal through the portal, they can put in a service request and identify the asset that needs servicing.

ALEC

36:40 If they, yeah, if they know it now, if they don't know what asset they serviced or needs to be serviced, they can just do either a general service request or a service request by the location. That way, when the office gets pinged, they know exactly where it's coming from and what we need to do. So it's up to them if they want to get really specific and request service for a specific asset or if they just want to do a general, it's kind of up to them.

PHONE CALLER #1

37:07 Nice.

ALEC

37:09 Do you find that a lot of your clients typically know what asset they need help with or is it just kind of a mixed bag or?

PHONE CALLER #1

37:17 Yeah, some do, some don't some just know that it's not working right? And some know specifically which item is not working, right?

ALEC

37:25 Gotcha. Yep. So, they have an option either way... but yeah, you know, you can see here. So this one has some information, you know, you could have as much or as little. It's just kind of up to you. But the client can go in there and see all this stuff if you want them to. And then they can see any deficiencies as well. So deficiencies is just repair opportunities or pull through work, whatever word you wanna use. They could see those. And then they can even see a service history as well. So this one doesn't have any service history. So just click on a random one. But they'd be able to see all that. Okay? And then, the last major tab here is we have deficiencies and quotes. So like I said, a big priority for us and our customers is increasing the pull

through work. So one way they do that is your client will obviously through service trade, be able to see the quotes probably a little bit faster and you guys will probably report a little more deficiencies, but in the portal, they can see all that stuff in real time as well. But what were you saying? Sorry?

PHONE CALLER #1

38:31 No, I was just listening, right? You must be getting some feedback through something. I'm not sure.

ALEC

38:37 Yeah, yeah. I don't know what's going on with my Zoom this morning because you're a little box lights up. So I think you're talking and then I don't want to interrupt you but no, no worries. Yeah, Zoom can be weird, but essentially, you know, Dave, you can see all the open efficiencies here and then similar to the invoicing kind of thing, you know, if they click on these quote numbers, they can go in there and they can approve the quotes or request changes. And the idea is that if they can log in and do this easily, you'd probably get more quotes approved or get bills paid, faster stuff like that.

PHONE CALLER #1

39:13 Are...

ALEC

39:13 Doing disputes?

PHONE CALLER #1

39:15 I completely agree.

ALEC

39:18 Yeah, yeah.

PHONE CALLER #1

39:22 Without notifying the customer, or trying to automate as much, as possible if a tech goes out and takes a look at three units on a PM and notices that two of them have significant work orders that need to be done and we put together deficiencies in the quotes. Does that automatically alert the customer to outstanding documents to be reviewed?

ALEC

39:49 Yeah, that's a good question. So, in the portal, they'll be able to see it in real time. I'm not sure if they'll receive an e-mail in real time, but the idea, is when the tech identifies like to inoperable deficiencies, you guys should be able to get that quote out to them very quickly. I'm not sure to be honest with you if they get notified, but my guess would be no, but if they have a portal and you're able to get the quote out in real time, you should be able to see that. Now what it does do in real time is whoever in your organization needs to see that or be alerted on that in real time. It'll

be like, hey, Alex found an issue with this unit and it's an urgent issue. So you guys internally will definitely be notified in real time. I just, I'm not quite sure if that customer would in this portal, but I could definitely double check but my guess would be no.

PHONE CALLER #1

40:39 Okay. That's probably better. I mean, you don't need them going off half cocked because they think that it's an end of the world problem when it really isn't...

ALEC

40:49 Right. Yeah. Absolutely. So, the idea is though is we do want people in the office seeing all this stuff in real time and you're in control over. Hey, do you want to receive a 1,000,000,000 emails from service trade or do you just want to receive specific ones? It's just kind of up to you guys?

PHONE CALLER #1

41:05 Yeah, no, that's good. I like the real time notification here in the office, of deficiencies that's cool.

ALEC

41:12 Yeah. And I'll definitely show you that here in a sec. This is definitely the next big thing I want to show you is that kind of process. But before we, you know, kinda shift gears to the office and then the field is this kind of what you were looking for in the portal or are kind of your impressions on this?

PHONE CALLER #1

41:27 Yeah, no, this is pretty much exactly what I was looking for. I mean we have some customers that would absolutely love this level of communication. I think that there are other customers that probably just wanted to be fixed, and move on. But certainly some of, the larger ones that have maintenance directors that, are more in tuned to, the assets on the roof are gonna want to know specifically what we're looking at and what we're seeing and why we're recommending things that we're recommending?

ALEC

41:55 Yep. Yeah, no, I think you're thinking just the way that, you know, the people that created this software. I think it's just, you know, tell the story, don't just send them a price, tell the story. And it seems like that's what you wanna do. So, yeah, we can definitely help you do that. But unless you have any other questions on this, I can kinda switch gears here. Sure. So this is the office view of service trade. What we're looking at is a work order... and there's really two major things I wanna point out on this page. So I believe you said something along the lines earlier about a price book and then obviously tracking equipments important. And this one's a little bit more specific to what you guys do. But essentially in service trade, you can track multiple pieces of equipment at multiple locations. So today, we're going out to east rooftop unit three.

PHONE CALLER #1

42:52 Okay.

ALEC

42:53 This is what you're seeing internally. So I showed you kind of what it would look like in the portal. This is what you're seeing from the office view. So you can track, you know, multiple pieces of equipment. You know, I know you kinda mentioned there, which is awesome, you know, filter quantity, filter size. You know, you can see here that you can fill out all these fields if you want or just some of them. But essentially, you can track as much or as little as this information is, you'd like... but you can also see down here any services tied to this piece of equipment, whether they're break fix or recurring services like PMS, you can see any work order history here. Any deficiencies or repair opportunities ever been logged. So really what this is going to help you do is manage risk for your client. So really at the end of the day, your job is to kinda help your client manage the risk of their units, that their facility is operating efficiently. So, by you having this deficiency history here, like, hey, maybe they've had quite a bit of a, or issues or broken compressor issues. You can always make that professional recommendation that maybe they need a new unit... and then, you know, attachment.

PHONE CALLER #1

44:09 Favor, can I put you on hold for just 30 seconds here?

ALEC

44:13 Yeah, yeah, absolutely. Take your time in.

PHONE CALLER #1

44:15 All right.

PHONE CALLER #1

45:34 I apologize for that.

ALEC

45:37 No, you're good. You're good. No, I completely, if you ever have to, I know it's a fast pace business. So if you ever have to take a step out, don't worry. But, yeah. And then all I was saying was you could also put an attachment or something here as well. And, and I'll definitely show you what your guys would see in the field. But that's kind of what the equipment piece of this looks like internally, at least.

PHONE CALLER #1

45:58 Let me ask you this. So if we have let's say 15 things that we have, on a PM checklist that they need to go through and identify and, you know, and fill out. Do you have the feature in there, to create a checklist for PM for these guys to go through, and put all that information in?

ALEC

46:19 Yeah. Is that done right now through paper or how is that done?

46:23 It's done on paper right now?

ALEC

46:24 Okay. And how many pages does that document?

PHONE CALLER #1

46:29 I too.

ALEC

46:30 Okay. Yeah. So we absolutely have that, you know, feature. Basically what our clients do for that specifically is fill able PDF. So basically, you could, you know, if you wanted to do that, our onboarding team could help you take those documents. You have now make them fill able PDFS and then they could go out and fill it out. And then as well on something coming probably in Q1 of next year, is we're also gonna have tasking? So if you wanna test set tasking schedules, that'll be there as well but you could absolutely do that.

PHONE CALLER #1

47:03 Would there be a way to not allow them to complete the job until, that syllable PDF has been completed?

ALEC

47:14 Yes, I think so. But I definitely need to double check. So basically a new feature that we got was, you know, required or digital handcuffs for lack of a better term. So right now, to my knowledge, if you need them to take a picture before leaving the site, they can, if you need them to, hey, did you look for deficiencies? You can do that as well leave a comment. I'm not quite sure on if a file PDF or getting that PM checklist done before completing it would be required, but I could definitely double check with you on that. But I do know that there's some ones in our system that I can show you in a sec pictures and stuff like that.

PHONE CALLER #1

47:53 Okay... cool.

ALEC

47:57 And then the other piece of this is the contract. So, you know, I'm sure all your clients have different mark up rules and different pricing rules. So service trade, you can set multiple pricing contracts. And the idea here is that you're going to be able to see what you expected to do versus what your actual margin was. And you can set multiple mark up rules and some of our clients have a universal one. And then a couple of companies specific ones, some of our companies have different tiers of plans and then some of them, you know, just do it by clients. So it's kind of up to you but you're able to set the different mark up rules and see how you're performing on this contract?

48:38 Awesome. I just went through and did that, on a few customers and had to manually download from multiple reports through Sage, to get that same information.

ALEC

48:50 Yep. So the idea is you won't have to rely as much on Sage to do that and you can, you know, do that, you're accurately billing and not having a, you know, triple check before you send stuff out?

PHONE CALLER #1

49:01 Yep. Let me ask you this. Do you have information readily available or would you know where I could find like what industry averages for service, and install percentages or... where do we set those expected margins? Is that something that we develop on our own or?

ALEC

49:21 Yeah. So that's something that you develop on your own. So the idea is like whatever because every, you know, state's different. We even work with Canada. Obviously, that's a whole different beast. But we do have some high level reports though, like for example, if I pull this up here, give me a sec. I'm just going on my different monitor. I can send you this.

ALEC

49:49 One second here. So I'm pulling this up from my second screen, but for example, we do have this benchmark report. So this is a report we actually pulled from all of our service trade customers. And this report goes over, hey, what are the best people doing in the industry as far as completing their work orders on time? Or hey, what are the best customers in the industry doing as far as days to invoice or, you know, pull through work? Like when you go to a PM, how often should we be finding repair opportunities? You know, there's all kinds of stuff. In this brief report. There's nothing as far as expected margin. From what I've heard from various people. Typically 35 percent is a decent margin. But yeah, I don't have any. I don't think we have anything as far as what would be a good margin, but I can definitely ask around. I'm sure someone here would know we actually.

PHONE CALLER #1

50:44 I didn't know if you compile that information or not.

ALEC

50:49 My guess is that we will eventually especially with the acquisition of Northboundary, but we do have some high level information but maybe not specific on like what's a good margin on a PM contract? But I can definitely ask some folks.

PHONE CALLER #1

51:04 Okay. You know, our experience as a PM is more a loss leader, to drive, your pull-through...

ALEC

51:11 Yep, exactly. And that that's the way we think about it too is, you know, you're not making a ton of money from just going out there every quarter. Really, the reason you're out there is to identify those repair opportunities as well as what you said earlier.

--- Call Setup ---

ALEC

51:25 You know, if you're always out there and then they need a project. All of a sudden. They're you're not blind bidding, like you said earlier. You're kind of that you've been there. You've been there kind of thing. So.

PHONE CALLER #1

51:36 Yep. Exactly.

ALEC

51:40 Cool. What I'll go ahead and do unless you have any other questions Dave is I'll just go ahead and go out here and I'll go ahead and show you what your text would work on in the field. Does that sound good to you?

--- Call Setup ends ---

PHONE CALLER #1

51:52 Yeah, no, that's great.

ALEC

51:53 Okay. Cool. So if you just give me a second, I'm gonna go ahead and start sharing my screen on my phone here while I'm pulling this up just so, you know, the service trade mobile app, it can be used on iPhone or android. It can also be used on a smartphone or a tablet.

PHONE CALLER #1

52:11 Yeah, yeah.

ALEC

52:12 Basically, what you're looking at here is these are the work orders that I have going on for today. There's all kinds of ways that I could filter these work orders, but this is just for today to keep it simple.

PHONE CALLER #1

52:23 Okay.

ALEC



52:26 Now, down here at the bottom, there's essentially three major ways to track time. It's completely up to you guys if you wanna use all three or just one. But down here, we have a job prep we have in route and we have on site, we can send our customer in route notification if we wanted to as well. Just another way to make a marketing impression.

PHONE CALLER #1

52:51 Sure. I do like that.

ALEC

52:55 Yes, that's...

PHONE CALLER #1

52:55 Not everybody does, but, I like it.

ALEC

53:01 Yeah, yeah, no, for example, right? Like, you know, about 11 my time. I don't know if you're central eastern, but about 11 my time, I have a doctor's appointment and they sent me a text yesterday, just reminding me, I know some people don't love them. Some people do. But for me, I don't know I got a lot going on. So I usually like a reminder. So I'm sure the people you guys work with have a lot going on too.

PHONE CALLER #1

53:24 Sure. Yeah.

ALEC

53:28 But as far Dave, is, this app, there's eight major tiles of information here. I'm gonna kind of walkthrough the main ones. So first here, we have our services. So that's gonna tell our technician what we're here to work on and what we're here to do. You can have multiple services on a work order. So if you had multiple PMS here, they'd see all that as well.

ALEC

53:55 You then can also see these comments. So these can be site specific comments. The idea with these is that this is limiting phone radio from the text back to the office. So basically here, we have our access codes or maybe we need to bring a tall ladder. These can also be internal notes for you guys in the office. So if you don't want to send Billy or something along those lines, you can do that as well.

PHONE CALLER #1

54:18 Okay.

ALEC

54:19 And then here at service trade similar to kind of what you've somewhat expressed to me is that we've heard from a lot of our customers that getting high

quality information from technicians isn't always easy. So what we try to do is give them as many ways to give you guys information. So that could be something like a comment, but that could also be like an audio memo. So maybe they just instead of typing a bunch of stuff, they'd rather... you know, kinda speak on that to you guys say, hey, I'm not here on site. I did, this and this, I'm gonna report this or whatever it might be.

PHONE CALLER #1

54:55 Okay. When you, when you go back to that comment section, is there a feature for them to talk to text?

ALEC

55:04 Yes. So let's just simply in whatever device they're using. So for example, I'm on an android device, so I can talk to text. And then if they're on apple, they can do that as well.

PHONE CALLER #1

55:17 Okay. I didn't know if that was if that was a program that ran independently on its own that limited different features.

ALEC

55:24 No, you're good. Yes, you'd be good to go on that. And then the cool thing about these audio memos too, if your tech prefer to use these for whatever reason we do, we're actually starting to do some AI stuff. Now, we actually have a webinar on that in a couple of days, I believe. And basically what AI is gonna do is if your technician report, you know, leaves an audio memo, AI will be able to transcribe what they said to something that's maybe a little bit more friendly for the customer here. So that's something that if you wanted to take advantage of it, you could do that.

PHONE CALLER #1

55:54 Yeah. That's cool.

ALEC

55:57 Yeah. Is there a reason that stands out to you or?

PHONE CALLER #1

56:01 You know, it's just you wanna make it as easy for the person in the field as possible. So the fewer things that they have to do, the more likely they're gonna do them. And if you have, you know, if you have a I, that can take an audio comment that the tech makes on field and transcribe it into a type written comment. I mean that then there's you know, there's written proof of what we did and what we're recommending. And it's all right there without having another person jump in the middle.

ALEC

56:31 Right, right. Yep. And yeah, and I'll definitely in a recap e-mail either today or tomorrow. I'll send you that webinar if you have the time to join, but I'll definitely send you a video. We actually put a video on our YouTube channel about it. It has our CEO and our, I believe our VP of product or something along those lines. And he kinda goes through the high level of there, if you wanna check that on your spare time. And then, you know, you kinda mentioned to me too, right? You know, taking pictures, telling the story, not just competing on price. So you can see here, my unit looks pretty bad. I'm gonna go ahead and take a picture of it here.

PHONE CALLER #1

57:08 Yep. I think that's probably one of the most important features truthfully.

ALEC

57:16 Yeah, no, I mean, it sounds pretty simple, right? I mean, a lot of platforms have it but, you know, it's you know, from what I talked to a lot of people like yourself every day and it's very rare that I hear that their clients hate pictures. We usually want a 1,000,000,000 pictures. So.

ALEC

57:39 Cool. And then the last thing I'll show you here, Dave, before we take a step back. So this is what the equipment looks like for your text in the field. So essentially, they can see the unit they're working on today or they can see all the equipment they work on at this site. So the customer has a question instead of calling the office, they have this log of truth... but I know you mentioned a little earlier to me that, hey, and Jobber, it's not the easiest to see that information as far as them. Just seeing simple information about the unit takes three clicks, click on the asset, click on the specific asset, and then boom, we have all that information here.

PHONE CALLER #1

58:19 Yep.

ALEC

58:20 And then they can see service history. So if someone else went and worked on this last time instead of them having a call, that guy, they can look at the service history right here. Any pull-through history or deficiency history and any files, photos, comments, all that good stuff.

ALEC

58:40 Yeah, it seems like you've liked quite a bit in this mobile app so far. I mean, what's kind of the thing you see making the biggest impact out of everything I've showed you so far on this app?

PHONE CALLER #1

58:51 I mean, truthfully it's gonna be ease of use. The easier it is to use, the more the person in the field is apt to use it. And that's I mean, that's what I'm looking for is it could have all the features in the world, but if it's not easy to use, it will never get used.

ALEC

59:08 Right. Yep. And this software was actually too, it was developed at a commercial service contracting company called unwell. So are people that designed this software? They're not just some people in silicon valley that have never worked in a commercial service contracting business. So they're very familiar with technicians, what they need to see, what's maybe just flat. So it's kinda designed to be pretty easy to navigate. Okay? So the last thing I want to show you here, Dave, before we go back to the office, so I can show you how this information travels is the deficient, I basically here, I'm just gonna show you how your tech could report a deficiency and how that information would go back to the office. So if I click on this deficiency button here, they can see all the deficiency history for this unit. But if they need to log a new one, they're just simply going to click. Plus. Now, similar to what you kinda told me, right? Technicians typically don't like to do a whole bunch of writing or typing. So they can just simply put in here like a compressor issue or whatever description they want.

PHONE CALLER #1

1:00:17 Huh.

ALEC

1:00:20 Similar to the attachments on the work order, they can also outline attachments for the deficiency or for the, yeah, for the deficiency specifically. So any pictures or audio memos, they might wanna leave.

ALEC

1:00:39 They then can also as well select the severity of the deficiencies. So I'm gonna say this deficiency is inoperable. It's not functioning.

PHONE CALLER #1

1:00:48 Yeah. Are those static choices or those choices that we would be able to put in there?

ALEC

1:00:56 Yeah. So these are the choices based on what are roughly 1,000 customers across the us and Canada thought to be relevant. Is there anything here that you'd like to see by chance?

PHONE CALLER #1

1:01:08 I was just curious.

ALEC

1:01:10 Okay. Gotcha. So, yeah, like just as an example, right? Like inoperable is kind of what you talked about earlier. These are urgent issues that the clients 99 percent chance going to approve the quote. But then some of these are, some of these are kinda similar to when you get your car service, like when you get to get an oil change, they might be like, hey, this isn't a problem now, but in six months, you might need to, you know, replace this or whatnot, they'd be more of the deficient and then

suggested. So you kinda have some options there. But obviously, the main one is the inoperable?

PHONE CALLER #1

1:01:43 Yeah... yeah.

ALEC

1:01:46 And then we also have, you know, the unit, so we can pertain it to the unit. So we're building out that service history. So I'm gonna pertain this to east rooftop unit three.

ALEC

1:01:58 And then I'm gonna say that this is a new deficiency something I need to get quoted out today. So this is something that my tech identified it's inoperable. And I need to get it quoted out today. So I'm gonna say it's a new deficiency.

PHONE CALLER #1

1:02:12 What would an invalid efficiency be?

ALEC

1:02:18 That's a good question. So invalid... that would be something like... maybe someone reported it before and we realized that it wasn't a right report. So maybe we want to go back and say, hey, this was not a valid efficiency. So maybe the tech in the field reported in an operative efficiency, but through talking to the customer and the technician, maybe there was an error and it was actually an invalid efficiency. So that's...

PHONE CALLER #1

1:02:47 Can update, that status once we've reviewed it... so that the customer history would reflect what it actually is.

ALEC

1:02:56 Exactly. Yep. Okay. I would say that one that's not a one that gets used a ton, a lot of the times it's either inoperable or it's fixed some of our customers, they have like a do not exceed limit. So, for example, if the repairs under 2000 bucks, maybe it's covered under contract or maybe they just want to do it and the technician knows that. So they might want to market as fixed that, hey, I identified it and I fixed it. So we need to Bill it out or whatnot. So there's just some options there.

PHONE CALLER #1

1:03:27 Gotcha.

ALEC

1:03:30 Do you think this would help your guys maybe report more repairs or at the very least, you know, get higher quality information back to the office or what's kind

of your impression?

PHONE CALLER #1

1:03:39 I think that, the transfer of information is, you know, that's... when you have paper, there's always a chance that something is going to get lost or it won't get written down or I meant to write it down but didn't you know, there's a lot of opportunity, for something to happen. I think having this and then having it available on the phone or tablet, whatever they're using on site and making it as easy to use as possible should hopefully allow for more identification of deficiency so that we can try to process that, and move forward with a greater pull-through rate.

ALEC

1:04:20 Yep. And yeah, that's you're speaking our language here. So, yeah. So I'll definitely show you real quick how this information goes back. So we're not only identifying more but how can we send more quotes out? So I'll definitely show you that... now, if we clock out of this job, well, the option to mark this services complete. If it wasn't complete, for whatever reason, we can state why it wasn't complete. Maybe we need to wait on parts or maybe there's another reason.

PHONE CALLER #1

1:04:51 Yep.

ALEC

1:04:53 But if we know it's complete, we'll just go ahead and click complete. And this is kind of that feature I was telling you about earlier. So maybe our technician forgot to attach a photo or something along those lines. You can kinda put these digital handcuffs on.

PHONE CALLER #1

1:05:09 Right.

ALEC

1:05:14 And if we go ahead here, I'll go ahead and finish that... and we'll go back to the office. If you just give me one sec... I'll show you how all this information travels.

ALEC

1:05:34 And then just so I'm being respectful of your time. How, how are we doing on time? I definitely don't want to go to over here, but how are we doing on time?

PHONE CALLER #1

1:05:42 You know, if we could, if we could start tying things up maybe, to shoot for an ending in 15, 20 minutes. That would be ideal.

ALEC

1:05:49 Okay. Sweet. Yeah, I can definitely do that. So just give me one sec. My Zoom is being really weird today. I don't know why.

ALEC

1:06:40 So basically here, how that information travels, it comes back in real time. So we can see here that the work order was completed. We can see that the service was completed as well. Any pictures, work. Acknowledgements, if you got that PM checklist that would live down here as well. So you can see that. But really the main one, I think what you're interested in is just the deficiency. So there's not only a dedicated section for this. The customer will also see that in the portal in real time... but they'll also come in via e-mail so basically here...

ALEC

1:07:29 Dave, we can see that... the... deficiency came in, who identified it? Where was it? What was the unit? What's the general description?

PHONE CALLER #1

1:07:45 That's an e-mail that's auto generated once the tech on site fills in the information, is that what that was?

ALEC

1:07:54 Correct. And, and you're in control of who you want to see it. So if you want a couple of people to see it, everyone to see it, it's up to you. But, exactly.

ALEC

1:08:05 So the idea with that is that instead of relying on internal phone calls or manually looking over notes that you'd see that in real time, so the tech could still be working on the job and maybe have enough information to send them the quote right then and there or what not. So. Yeah.

PHONE CALLER #1

1:08:21 Yeah, cool.

ALEC

1:08:24 And then from here, we can see, you know, the deficiency, you know, if the tech had a proposed solution, we can also see related history. So what deficiencies have been reported on this in the past? And we can also see as well on any pictures that were collected. So you can see here that picture I took earlier is right there as well. Obviously, I'm sure you would take.

PHONE CALLER #1

1:08:49 Hopefully.

ALEC

1:08:50 All right. Yeah, that's all put those digital handcuffs on them, take a 1,000 pictures before you leave technician slash photographer. But anyways, to put this to a quote, Dave, we can go ahead and put this to a quote. So I'm gonna go ahead and click here, add the quote and create quote.

ALEC

1:09:15 As far as what this looks like? So if this is a relatively unique repair, you can always go in and manually add a quote description, manually, add any parts, labor items. But what a lot of our customers like to do, they like to create these quote templates for your relatively common repairs. These are your templates. So with the verbiage you like, and the parts labor items you need.

ALEC

1:09:43 So if I click this here, I can go ahead and add these items. And basically, you can see here that the idea is that we might need to go in and make any slight adjustments. Like maybe this verb is used to be a little bit different on this one or maybe the amount has changed. So, for example, hey, maybe we need four, four hours of labor, not three. And then hey, maybe we need a different formatting for this quote specifically, we can see that.

ALEC

1:10:18 Just curious before I send this out to you so you can see what your customer would see. How does this compare to what you guys are doing now? Are you guys doing this in Jobber? Are you doing this somewhere else or how does this kinda compare to what you?

PHONE CALLER #1

1:10:31 This is all an e-mail that's manually done afterwards. So anything is an improvement.

ALEC

1:10:36 Okay. Gotcha. And so, I'm assuming you guys are doing a lot of like copy and paste action and stuff like that.

PHONE CALLER #1

1:10:46 Yeah, or just generating all new verbiage.

ALEC

1:10:51 Okay. Gotcha.

PHONE CALLER #1

1:10:52 There's a lot of there's a lot of steps that are being duplicated. You know, the tech will go out there and identify an issue, and then it'll get translated to the service manager, and then the service managers going to type up an e-mail or make a phone call and identify what the issue is and talk to, the person in charge.



--- Wrap-up ---

PHONE CALLER #1

1:11:10 And then, you know, it's there's a lot of steps. And if we can start reducing steps, I think that we can be a little more efficient with our time.

ALEC

1:11:22 Right. And, and what would you guys do with that time if you were able to free up a couple of hours in your week day or whatnot, would that just be dedicated to sales? Or would that be dedicated to other things? What do you think you guys would do with that time?

PHONE CALLER #1

1:11:35 You know, that once we have it, then we can figure that out. But right now, we don't have it, so.

ALEC

1:11:40 Gotcha.

PHONE CALLER #1

1:11:41 Okay. It all be just speculation.

ALEC

1:11:44 I hear you. Well, you know, it's always fun to know. Hey, what I do at this time, that's a good problem to have. So I'll go ahead and send this to you, David, just so you can see what your customer would see. I know I already kinda showed you this in the portal, but it is pretty good just to get an idea of, you know, how your customer would interact with this. So, I'm out of send you this quote. It's gonna be from a var service?

PHONE CALLER #1

1:12:12 Okay.

ALEC

1:12:12 If you can go ahead and click on, it should be like it should say something along the lines of review and respond to quote. And then if you could approve that quote, that'll be great and we'd love to hear your thoughts, good, better indifferent.

PHONE CALLER #1

1:12:27 Okay. Have you sent it?

--- Wrap-up ends ---

ALEC

1:12:31 Yes, I sent it to the e-mail that.

PHONE CALLER #1

1:12:33 I just got it. Wait.

PHONE CALLER #1

1:12:52 I like that. That's and that was all just pulled straight through, from the service call, correct? Correct?

ALEC

1:13:00 So, this basically in this quote example... my guy went out to a PM, he found this repair opportunity and in real time, he reported it office out visibility. And now the customer as a quote, obviously, you can't always get it out that quick. But yep, that's the general concept.

PHONE CALLER #1

1:13:20 I like that. And then boom, you hit the button.

PHONE CALLER #1

1:13:29 Yeah, no, that's like... that's. Like, yeah, I like that.

ALEC

1:13:37 Yeah, you know, especially around the holidays right now, it's kinda giving them that prime experience. You know, Amazon is definitely shortened. Everyone's attention span and everyone just, you know, kinda expects things to happen really fast. I know I ordered a chair the other day and it came to my house like super quick. I was kinda crazy, but that's kinda the concept with that. I mean, do you think that help you guys get some more quotes approved?

PHONE CALLER #1

1:14:00 Yeah, I would think so. I mean, anytime that you can speed up the transfer of information, you increase the likelihood, of receiving that work right away.

ALEC

1:14:11 Exactly. And that, and that's why a lot of our customers renew. Is typically this just this workflow alone? So not even the portal, not even some of the other things we talked about, just the ability to streamline this process, creating a visually appealing quote that's easy for the customer approved this feature alone. Typically if the, you know, person is using it, right? Typically makes service trade pay for itself. So... so assuming you've approved that here, I'm gonna go in and refresh it just so you can see. And then, yep. So you don't have to Chase down those customer. POS, they can actually put that in. So you don't have to Chase those down now with you guys sending them out kind of manually, is it ever hard to track what quotes you have out there? What quotes are outstanding? Who you need to follow up on stuff like that?

PHONE CALLER #1

1:15:00 Sure. I mean there's always, there always exists the opportunity for something to get lost in the crack.

ALEC

1:15:05 Yeah. And, you know, human error is always going to be there, right? We're just trying to minimize it as much as we can, but, you know, for example, here, this is our quote dashboard. So are you the one sending out these quotes or is it someone else or is it like a team of people or who kind of?

PHONE CALLER #1

1:15:24 There's multiple people?

ALEC

1:15:26 Okay. So whoever you'd want to have visibility on this, you know, you can run a little quote report. It's up to you if you want to get super specific or super high level. But the way a lot of our customers do it is like, hey, end of the week, maybe we wanna look at, hey, what are all the quotes that have been submitted and viewed? Basically, meaning that we send it out to the customer, they viewed it, but they haven't done anything with it. So we can see all those and we can prioritize based on the totals on the right here. You know, we can always obviously call them up. I mean, the phones UN defeated but we can as well. Sometimes it's just as simple as sending it back out to the customer. So maybe we want to send all these back out in bulk to the customer. Now, since you guys, it seems like you'd probably start with the portal, you know, obviously you guys having a portal gives you a unique competitive advantage where they can always just log in. But if for whatever reason, you'd want to send these back out, you can do that.

PHONE CALLER #1

1:16:27 Well... it's nice too because it looks like you can download that to a spreadsheet and then you can identify your hit rate and... really kinda dial in and look at the metrics, that are of importance to you for whatever meeting that you're about to go into.

ALEC

1:16:49 Yep. Exactly. So a lot of these reports have the export to spreadsheet function. So if that's something you guys would wanna take advantage of that can now, you mentioned metrics, there, is there any metrics that you guys typically care about the most when you guys have meetings or whatnot?

PHONE CALLER #1

1:17:07 You know, conversion rates always going to be high on that list. You know, it's, are we taking the opportunities and turning them into to revenue? And if we are great, if we aren't why?

ALEC

1:17:20 Yep. Yeah, no, that's definitely super important. So yeah, we can definitely help out with that. Well, Dave, you know, there's definitely a lot more that I could show you but I definitely want to be respectful of your time. So I think this is probably a good stopping point since I think we kinda touched on the major things. I know that there was a lot of things we probably could have got to today, but we didn't get to. But do you just want to kinda hear, I mean based on what you've seen so far, do you think that... service trade is a good fit for what you're looking for?

PHONE CALLER #1

1:17:50 Yeah, I mean it certainly hits on a number, of topics that, are high on my list of being able to identify track, and be able to report on. So, you know, there are a lot of features here, that certainly, that still fill the gap or fill the void that we have right now. As with anything, you know, it's, it can be a great software. But if it's not one easy to use and two financially responsible of a choice for us to make then, you know, I can't say to how effective it would be.

ALEC

1:18:24 Right, right. And that, you know, like you said, I mean that's any system you buy, what I will say is that, you know, with our retention rate and some of our numbers that I'll send you in a recap, e-mail, typically our customers are getting pretty good results, but I mean you're right? You gotta use the system the way it's designed to use. And we try to make it as simple as possible. Now, is there anything specific that you really like today? Or what kind of the main benefits you saw today that you really like that stood up to you?

PHONE CALLER #1

1:18:52 Well, I mean aside from the benefits, what I'm more concerned with, is onboarding. So... when I integrated service tighten in, we went from house call, which was really easy to use. I mean, just very user friendly, very intuitive to a much more robust platform that was considerably more complex that required a lot more attention and onboarding time. So with your software here, what are we looking at as far as onboarding time? I mean, the platform, the mobile platform looks relatively easy to use, but I mean, are there a lot of back end steps that we're going to have to go through to complete before it's usable? Like I had to do with service tighten or is this kinda built ready to go?

ALEC

1:19:37 Yeah, yeah, great question. So I definitely say that, you know, I think ServiceTitan from what I've heard from folks, it is a pretty complicated system. I wanna say we're as complicated as ServiceTitan. Now, what I will say is it's not going to be a plug and play it's not like a, you know, obviously our system is not a Jobber and you've kind of experienced some of the limitations of Jobber, but essentially our onboarding process depending on what plan it can take anywhere from 60 to 90 days. My guess is that you'd be right in the middle. The technician training is easily the simplest that's only about a two hour training, but we have a very thorough onboarding process I could send you if it'd be valuable, able to a pretty robust document that kinda goes through how many hours from the project lead, how many hours can you expect for each person? But we have a very robust process as well as you'll have an implementation specialist that you can meet with every week. Our implementation specialists, they're actually here in the states. Most of them are local here in Durham. So you're not dealing with someone over seas or something like

that. But this section on our website, I think I went to resources onboarding. This kinda gives you a good high level overview of what that process looks like. But if you want something a little bit more thorough in detail, I can definitely send you that as well.

#### PHONE CALLER #1

1:20:55 Yeah. If you could send, that would be ideal because I, you know, I'd really like to know what I'm getting into because when I onboarded with service tight and I had a rough idea but I had no idea that I needed to dedicate one person full time to managing that. And, and really it was a little misleading when I started now once we get, once we got further down the road six months into, it made a lot of sense but for six months, you know, your second guessing the entire time. Is this really worth it? Are we taking advantage of what we should be taking advantage of? And I don't want a second guess things because when you're second guessing, you're not fully integrating it and you're never really diving all the way and you still got, you know, one foot out and you're not sure if you, this is where you wanna be.

#### ALEC

1:21:39 Yeah, yeah, absolutely. And I'm all about being transparent so that there's no surprises. The big thing with us. I mean, realistically you guys are running a business, right? You know, service trade, you know, this all looks great and, you know, implementing this, we'll do a lot for your business, but at the end of the day, your business and your customers will take priority. So, just like any other onboarding, I'm not gonna sit here and be like it's easy. It's a walk in the park. But what I will say is we're very structured about it. We do try to make it as easy as possible. And honestly if you just show up to the calls and just follow up, the implementation person is telling you to do. Usually it's pretty straightforward. There's no issues. The only time we have issues with our team really is when people aren't showing up, you know, and that's something we can't really control. So with that being said, I mean did you have a timeline in mind or when you want to go live with something or when you would want to start that implementation process? Did you have any?

#### PHONE CALLER #1

1:22:34 Ideally first of the year. Yeah, you know, quarter one, would be the ideal situation but, you know, there's stuff on my end, that we have to clear too. So, you know, as much information as I can get on the front end will make it a lot easier, to go through, the ranks and make sure that we're able to, get, the ability to implement in the time frame that we're looking for.

#### ALEC

1:22:59 Okay. Well, you know, we can always shoot for your goal. So I mean, if that's your goal, you'd probably wanna make a decision on service trade in about a month. Typically these evaluations take anywhere from four to six weeks. Now, if you know, by chance, you can't do that. If you made a decision by the end of the year, you'd probably be looking at like a 115 to one start date. Now. I definitely don't wanna, you know, I just want to be honest with you because I know that's super important BuildOps they have, you know, pretty cool technology. I'm not gonna lie. You're probably going to be impressed with what they have, but what we have heard from our customers because we've had some customers leave service trade go to BuildOps and then come back to us as we have heard that they've over promised on the

onboarding front and that their process isn't super structured. Now, you don't have to take it from me. I have plenty of references that can tell you that if you'd be interested at any point in the process of talking to them. But if you talk to them and you start leaning their way, I definitely recommend then supply you with that documentation as well as maybe talk to a reference that's live with BuildOps because we have heard that they have a lot of customers but not all their customers are live. And you don't have to take it. You don't have to take it from me. You can either talk to our folks or their folks, but that's just something I'd keep in mind if you talk with them.

PHONE CALLER #1

1:24:24 No, absolutely. And like I said, I like what I've seen so far. So if you can get me, the detailed information regarding onboarding, and... obviously, we haven't you know, we're coming to a close, my availability right now, but we haven't discussed any of, the pricing on that either. So, you know, if we can get some indication, of what we're looking at as far as pricing, I think that those two items are going, to help us, you know, get to where we need to be.

ALEC

1:24:55 Yep. And are you guys at for service text right now?

PHONE CALLER #1

1:24:59 Correct. But I would like to try to integrate as much as we can with the install team too because I don't want to run multiple software platforms.

ALEC

1:25:10 Okay. Yeah. So, if he is the service portal a nice to have or a mustache for you guys?

PHONE CALLER #1

1:25:19 The customer portal?

ALEC

1:25:20 Yeah, customer report, I should say.

PHONE CALLER #1

1:25:23 That's I would say top two things that attracted me to your software.

ALEC

1:25:29 Okay. So you'd probably look at the premium plan. So the premium plan is one 39 per month per technician built annual. How, how many installed guys do you guys have?

PHONE CALLER #1

1:25:45 Eight to 10?

ALEC

1:25:48 Okay.

PHONE CALLER #1

1:25:49 I mean.

PHONE CALLER #1

1:25:54 But I mean, we potentially could just have the lead on there and the lead reach out to the people that are additionally on the install project without having them on the resource itself.

ALEC

1:26:12 Okay. Gotcha. Yeah. So I don't wanna take up too much of your time. This is probably something that needs a deeper dive because I just wanna make sure I work for that side and I don't want to drill you with like five, you know, 10 minute questions here, because I know you gotta go. Would you be open to talking later in the week? And maybe I could, I'll send you a quote, so you have that pricing?

PHONE CALLER #1

1:26:37 Yeah.

ALEC

1:26:38 And there's definitely a couple more things I wanna kinda get on the same page with.

PHONE CALLER #1

1:26:41 You on?

ALEC

1:26:42 Be open maybe Thursday or Friday having a brief 15 minute call so we can make sure that this aligns with the install guys as well as go over pricing, clarify any of that.

--- Next Steps ---

PHONE CALLER #1

1:26:55 Yeah, that would be good in the afternoon would be ideal.

ALEC

1:26:59 Okay. Are you central or eastern?

PHONE CALLER #1

1:27:01 Eastern...

ALEC

1:27:03 Okay. So.

PHONE CALLER #1

1:27:06 Friday afternoon. Yeah, I don't really.

ALEC

1:27:09 Have any time Friday afternoon. I could do Thursday at one, two or three, whatever you prefer?

PHONE CALLER #1

1:27:16 Let's go Thursday at two.

ALEC

1:27:18 Okay. Sweet. I'll send you a calendar invite for that, and then I'll send you the recap e-mail tomorrow morning. I do have a pretty busy day, so I probably can't get that today, but I'll try to send that to you first thing tomorrow morning and I'll have everything you want in there.

PHONE CALLER #1

1:27:31 Okay. That sounds good.

ALEC

1:27:32 All right. Sweet. Well, thanks for your time, Dave. I'll go ahead and let you get back to it. But I appreciate you going a little bit over here and happy to continue the conversation?

PHONE CALLER #1

1:27:42 Perfect. I appreciate the time. Thank you, ma'am...

ALEC

1:27:44 No problem. You have a good one man you.

PHONE CALLER #1

1:27:46 Too. Bye.

ALEC

1:27:47 Bye.

*The End*