ServiceTrade Demo with SWK Mechanical

Susan Warren with SWK Mechanical
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Participants

ServiceTrade

Susan Warren
Territory Manager

Will Scott
SDR

SWK Mechanical

Kevin Trask
President

Other

Susan Demo Phone

Topics

Transcript

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SUSAN

0:00 God afternoon, how are you?

KEVIN

0:02 Good. How are you?

SUSAN

0:03 Good, good. Do I have? I'm, assuming I've got Kevin on the line?

KEVIN

0:08 You too. Yep. Nice to me to take care bye.

SUSAN

0:11 Even I'm Susan Warren, I'm a territory manager here at service trade. I appreciate you taking the time, to hop on and, great to see it. It's always so much easier to have a semi face to face conversation. How's your day going so far?

KEVIN

0:31 It's good, you worries.

SUSAN

0:34 Pretty pretty good. I've been trying to come back from waking up after having a dream where I woke up thinking it was Saturday morning, but I've since recovered and accepted the fact that it is a Monday, so.

KEVIN

0:48 I...

SUSAN

0:51 I've come to terms with reality, but yeah, I appreciate you hopping on with me.

--- Purchase decision ---

SUSAN

0:57 Basically the game plan if it sounds good to you is to, you know, take some time, learn more about as business, what your goals are, what you're hoping to accomplish potentially with a tool like service trade. I'll show you a little bit about, you know, the folks that see the most value out of our tool and then, you know, spend a bulk of the time actually showing you the workflows. If you're liking what you're seeing, we can talk next steps, sound good?

--- Purchase decision ends ---

KEVIN

1:24 Yep. Sounds good.

SUSAN

1:26 Awesome. And just in terms of timing any hard stops coming up that I need to be cognizant of?

KEVIN

1:32 I think we have this for an hour, right? Yeah. So I'm good for the hour.

SUSAN

1:38 Fantastic. Always good. I had someone the other day. I was like, I only have 15 minutes. I'm like I don't know what to show you in 15 minutes. So, yeah, I was looking at the notes, so it looks like you've been with Northboundary for a good chunk of time.

KEVIN

1:56 Yup.

SUSAN

1:57 So, gosh, it was about 10 years is, would you say?

KEVIN

2:02 Yeah. So kinda rolled out his online, his upgraded online version that's when we jumped on. So... I know.

--- Type of work ---

SUSAN

2:13 Yeah, you know, I saw in the notes here that you guys are currently using ServiceFusion out in the field. Yep. And yeah. So basically, I just want to kinda confirm, you know, a few details like that. So fusion and then Quickbooks online for accounting. Yep. Yeah. And in terms of total folks currently work out in the field when, things like, you know, inspection, repairs, preventative maintenance, you know, the shorter term installs that lasts like less than six months. Would you say that's about six folks?

KEVIN

2:57 It's five...

SUSAN

2:59 Five gotcha. Perfect. And about 75 percent commercial.

KEVIN

3:06 Yeah, that's accurate.

SUSAN

3:09 Now, in terms of the work that all are doing, you know, just seeing the notes as mostly plan maintenance, but do you guys do a significant amount of installs? Would you say?

KEVIN

3:20 Yeah, we do more on the residential side, we do installs commercially. We'll do retrofit and whatnot for direct clients... upgrade?

SUSAN

3:30 OSHA.

KEVIN

3:31 Things like that.

SUSAN

3:34 If you had to roughly guess what the percentage of non service work would be, what would you ballpark that up?

KEVIN

3:41 Define non service?

SUSAN

3:43 So any kind of install basically?

KEVIN

3:51 Probably 2025 percent.

SUSAN

3:54 At a very good. And then, you know, thinking about that service work, if you had to break it up into plan maintenance or versus reactive maintenance, what percentage would you say is more proactive like plan maintenance?

KEVIN

4:08 Yeah, we're 80 percent plan.

SUSAN

4:12 Good. Awesome. And, you know, saw in the notes here that you guys are focused on hvac and electrical. Is that correct? Or is there anything else that should be added to your kind of bread and butter services?

KEVIN

4:25 No, that's it.

SUSAN

4:27 And tell me a little bit about your customers. You know, what type of industries are you servicing?

KEVIN

4:33 We're kind of right across the board. I mean, our ideal clients are direct owner, you know, 20,000 square feet buildings. You know, we do education, food services. We do commercial leasing spaces... kind of really any clients that fit into, you know, those type of molds that's what we're after.

SUSAN

5:00 Sounds good. Well, getting all the kind of demographic stuff out of the way. I'd love to know, you know, kinda what, what's bringing you in today? What's what's sparking the interest and taking a look at something outside of, your current process with fusion?

KEVIN

5:17 Well, fusion is as... most, I shouldn't say most, a lot of the operating software out there, this one fits into the residential mode more than the commercial mode. So, you start to see it real soon that, you know, your commercial clients, you don't have, the same transparency that you would... for residential. So that's kind of our hick up right now as we're you know, we're scaling the business, and I need to make sure now I'm looking at something and support commercial more than residential. I don't want to be doing it later on a time. So that's really where today's kinda focused on.

SUSAN

6:02 Absolutely. And, and what kinds of challenges is, you know, more specifically, is fusion giving you with your commercial customers? Like what are some things that you're not able to do that you wish you could?

KEVIN

6:13 Well, it's really preventative maintenance. I mean, their ideal situation, for a preventative on a residential scale is just an annual. So when you get into commercial, it's completely different. So that's kinda the struggle.

SUSAN

6:30 Yeah, that you're not the first person, to kinda tell me that because, yeah, I mean at the end of the day, it's it was certainly designed with residential in mind and you know, you can kind of dovetail commercial in there, but it's not what it was designed for.

--- Type of work ends ---

SUSAN

6:50 Any other challenges that you're running into. How is it? So, like for example, a lot of folks tell me that it's a little bit tricky to like access equipment history with tools like that. Any, any challenges around that in terms of like overall the tech experience while they're out there?

KEVIN

7:05 It's okay. Again, it's not made to navigate through equipment like a commercial aspect. I mean, they still have assets that they tie to work order. So you can get through there. Definitely not seamless.

SUSAN

7:22 Gotcha. Definitely makes sense. So, so some of those are some of the things that are kind of frustrating you right now or, you know, making you kinda look around what are some of your gotta have, for a tool like this? What are, you know, if you had to say these are my, you know, two three things that are, I got to have these in a tool like this?

KEVIN

7:46 Again, I mean, it's gonna be the preventative maintenance side. What we're missing right now is apr reporting, you know, how these things are actually doing? For an agreement standpoint. We don't have any of that that's kinda must have. Obviously everything is online now, but, you know, dispatching tool and then, you know, access to history from the field is a must too. Gotta make sure that our guys can look that up if they need be. And then Progress billing is one of the things that ServiceFusion doesn't have that we need as well.

SUSAN

8:23 It sure a few questions about that one, when you talk about reporting when it comes to plan maintenance or is it about, is that reporting more focused around the ability to see what's coming up and making sure things aren't falling through the cracks. Are we talking about profitability of certain agreements or anything in particular around that?

KEVIN

8:46 Well, apr are performance report. So, yeah, I mean, we wanna know, are we making money? Are we not making money? Northboundary does a good job, of putting that all together and setting it up for scheduling and, you know, their internal tasking and whatnot. So, you know, I would hope that service trade would be integrated pretty smoothly. I mean, I know you guys are obviously new to Vince products, so I'm sure there's going to be some learning curves, but, you know, from the other side that Vince doesn't get the, you know, how do these things perform? How are they, you know, to plan? How are they for extras?

--- ST app contracts and pricing ---

KEVIN

9:20 How are you tracking extras on agreements? How you're tracking? You know, P, PR, let's say project performance reports, stuff like that. You don't get that out of Northboundary, certainly don't get it out ServiceFusion. So those are the things that we mission right now.

SUSAN

9:35 Yeah. And when you say Progress Billing, is that like about stages or is that more about percentages?

KEVIN

9:41 You know, Progress billing is just, yeah, when you're working through a project, you have the ability to just do percentage of billing to completion.

SUSAN

9:55 Very good. Now, you know, let's say hypothetically and something I completely forgot to confirm your official job title. There is the president, very good.

--- Purchase decision ---

SUSAN

10:08 Now, you know, let's say, we go through this today, potentially, you know, finish up showing some other things a later date. But let's say hypothetically you love what you're seeing you're like this is the right tool for the job. It's designed to work with Northboundary fantastic. The value it was the price. Who else would, you know, sorta have need to be involved in that discussion? Who has a veto rights? Anybody?

--- Type of work ---

KEVIN

10:32 Just me there.

SUSAN

10:34 You go.

SUSAN

10:40 And anybody else you guys have taken a look at outside of us? And of course, you know, the existing tool that you have.

KEVIN

10:49 Yeah, I mean, ServiceFusion obviously looked at. We also looked at tighten, whatever that's called service tighten, I think and then build ups as well.

--- Type of work ends ---

SUSAN

11:07 Anything in particular that, you really love that you saw there or felt like they were missing in this?

KEVIN

11:14 BuildOps, is pretty inclusive. They, they've kind of nailed it down on what they need. Service tighten, is, yeah, it's complicated simplicity sometimes is the best. You know what I mean? They just get too much information you got, you can't really process at all. So.

SUSAN

11:38 Yeah... that definitely makes sense. But, but overall BuildOps you felt like was, a pretty good fit. We were, they able to, you know, do some sort of like custom API stuff for bringing information from Northboundary into to BuildOps. Did they talk about that?

KEVIN

11:58 Yeah. They got a pretty good team there that's pretty confident about integration. So just depending on what you want, right?

SUSAN

12:09 Gotcha. Very good. All right. Any other kind of big picture things that, you know, in the discussion have sprung to mind things, you know, you really wanna see besides what we've already covered, things that are a real kind of turn off for you?

KEVIN

12:26 No, no. I just like to see how it integrates with Northboundary really?

SUSAN

12:33 Yeah. So just to kinda give a heads up. So basically the plan for today, you know, I definitely want to show you all the key functionalities especially over everything you talked about with the pieces we just went over with service trade. If you want to see like an sort of a go into like real in depth kind of technical to a. When it comes to, what does that look like? I really wanna see like I click, yes, this is sold in Northboundary. What does that look like in service trade? That would be something I would recommend that you check out a webinar that this does. He does there's one coming up tomorrow, and then I think there's another one next week. I actually just got off a meeting this morning with someone else that wants to see that exact like I wanna see like what does it look like when it comes over? And they're actually gonna do that tomorrow at 11 eastern. So I would recommend checking that out for sure so you can see that component.

--- Purchase decision ---

SUSAN

13:30 But in terms of today, I'm definitely more than happy to, of course, you know, show you around service trade itself. Okay. Sweet. Well, if it sounds good to you, I'd love to just kinda just quickly go through just a little bit of back story on us. Let's see.

--- Access to information ---

SUSAN

13:56 Go ahead and share my screen and please let me know if my audio gets a little garbled, anything like that. I'm more than happy to, you know, I can turn camera off, make my internet connection a little bit stronger. But go ahead, share my screen here. So in just a few seconds, you should be seeing a... loading screen yep.

--- Access to information ends ---

SUSAN

14:26 So a little bit of back story about us. We have been around for just over 10 years. It'll be our 11 year anniversary. This summer. We currently have just over 1,200 north American customers. We manage more than 13,000,000 assets, more than 10 percent of us commercial industrial buildings are serviced by service trade.

--- Customer engagement ---

SUSAN

14:51 And then we've helped our customers generate invoice is for more than seven point 5,000,000,000 dollars. You know, everything that we do kind of flows up into these buckets. We wanna help, you know, be more efficient and therefore control costs, but also help you grow quality revenue. So, you know, the improvement of the efficiency and overall operations around service and projects, helping your technicians be set up for success that we talked about with, you know, the ease of use of their mobile app, as well as access to asset history while they're out in the field, reducing those phone calls back and forth, wait time, et cetera. And of course, we want to help you make more money by generating more quotes and getting helping to get those quotes approved faster through more robust information on there. And then finally, we want to help folks, you know, through better customer communication, you know, be more profitable and grow, that customer loyalty there.

--- Customer engagement ends ---

SUSAN

15:50 And we kind of break that a little bit further and kinda into these like five categories here. You know, when we think about office coordination, that's you know, keeping up with the obligations you have around project deadlines, around service agreements, making sure nothing's falling through the cracks, you know, keeping up with time tracking parts, etcetera.

--- *Customer engagement* ---

SUSAN

16:11 When it comes to technicians, it's about, you know, making sure they have access to everything they need to the job. It's super easy for them to report information back to the office and even the ability to have customers sign off and work that they've completed on site. I also, you know, in terms of customer communication is the ability to send real time updates, you know, through our portal, the ability to go and see a full complete history of everything that's been done... request service on specific assets and they can, you know, easily approve and pay invoices online in terms of management visibility that's all about, you know, the reporting function that we talked about, you know, everything that, you know, soup to nuts from dispatching all. The way to generating that invoice lives in service trade and the ability to report on all those functions while you're out there or while you're you know, inside of the tool. And then finally we wanna, you know, help you now that you've sold all of these amazing service agreements and project proposals in Northboundary, being able to execute on that and then get additional pull through revenue, for example, from those planned maintenance visits from easily requesting, you know, having the technician reported efficiency, get information back to the office quoted out, and then get that approved really quickly and managing the pipeline of potential jobs from that. I kinda just talk for quite a bit, but we'd love to know, your thoughts on these pieces. You know, perhaps, you know, if you had to think which kind of two categories would you say are probably the biggest priorities for you? Which one would you say?

KEVIN

17:55 The reporting would be one. And then you mentioned customer or a portal, is that a customer portal?

SUSAN

18:06 Yes, for the, it would be a link on your website that they could click on, log into with their unique credentials and see their particular service history, et cetera.

KEVIN

18:16 Yeah, those would be, those would be too interesting topics.

SUSAN

18:20 Absolutely. Very good. Well, let's jump in without any further ado.

--- *Recurring maintenance* ---

SUSAN

18:34 So this is the job that I have created for us today to kinda walkthrough whenever you see job and service trade, think work order. These are really robust. You can have multiple appointments on here on multiple technicians. You can have, you can have the expectation to perform multiple services on multiple assets at any given appointment.

--- Assets ---

SUSAN

18:58 So a lot of flexibility here. You can see from the jump, how we're designed for commercial in the sense that everything is performed on an asset, that asset lives at this particular location. That particular location is a part of this company. You know, I like to kinda jump in from here and show, you know, this is just, a regular go out here and perform plan maintenance appointment, but I just want to show you a little bit of our current functionality when it comes to kind of managing this as a project.

--- ST app contracts and pricing ---

SUSAN

19:32 So if we go over here and click manage job, we can just toggle on that. Yes, we wanna manage this as a project. And I'll just put in a sample text here... and we'll say we're starting this now and we expect to complete it by the end of the month. So quickly show you some of the functionality that's available with this. So, you know, here, of course, you know, if this was, a true project, you'd have multiple, you know, appointments, you know, with different phases on it. So, you know, each service that's on here would be, you know, like phase one, phase two, phase case three, you'd be able to add all that in. And as you completed each of those, it would show what level of completion that you're currently at up here and you've got those dates on there as well. So when we click in here, we can go ahead and create a budget. So if we want to do a budget creation and budget management, it's gonna take all of the items that are on that work order. And it's going to basically turn this into a budget. So we wanna see this granular one. Of course, it's going to be super simplistic, to, because, you know, we've only got those two items on there, but it's gonna break it out by different categories here. You can of course make edits that will then be reflected back on the work order. And then when you're ready, you're like this is good to go. I feel comfortable here. You can go ahead and lock that budget. And from that point forward, you would use change orders to make changes to it. And those can be done internally only and still reflect in here or if it's something that you need to. Get the customer to sign off on. You can easily send a change order request through there. So do have a kind of a more robust version of this that I can quickly show you. So with our budget job here. So this is one that has, you know, kind of those multi phases that are on it.

SUSAN

21:39 So you can go in here and view the budget.

SUSAN

21:50 This is, you know, where we've got, you know, these three different phases on here. All these categories are broken out here. You can see all of your margins. You can go in here and see the change order history where we've gotten various things approved on this.

SUSAN

22:15 Head back over to the job.

SUSAN

22:22 And then if we go over here to performance... obviously, we haven't started this yet. But you can see your total incurred cost. The total invoice margins will of course, appear there another way to view the budget. And then you can also view that work in Progress screen here. So you can just track that performance here as well. I'll just take a second to load. And then something I will say in terms of Progress billing by percentage... that is something that in terms of our sales engineers reporting into us, that is going to be kinda the final piece of our project management update that is due out. I believe the last update was in about three Ish weeks. You'll have the ability, to do that Progress billing. But this is the work in Progress screen. So you can get visibility into all of that as well. Yeah, or all these pieces, you know, kind of what you're looking for in terms of project management.

KEVIN

23:30 So you said, the Progress billing is not implemented yet on your way now.

SUSAN

23:37 So in terms of percentages, that is like I said, we've been told that that's like about three to four weeks off. But what you can currently do and have been able to do for quite some time is Bill by phases. So you could, you know, for example, you know, you could Bill out for phase one for this 24 K and then you can Bill out for phase two. But in terms of, you know, billing out and that traditional percentage Progress billing, that would be something that's just down the road.

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

SUSAN

24:09 Okay? So, yeah. So that, that's kind of an overview of project management there. Let me go back over here to this main job. But yeah, in terms of actually, you know, taking a look at the work order itself. As I mentioned, this is the a plan maintenance appointment for us to go out and perform.

--- Recurring maintenance ---

SUSAN

24:29 That. It's something thing that's done quarterly. So basically the way, that works as, you know, we initially brought in from Northboundary, all your tasking is gonna come through and specifically what it looks like you can see on that webinar. But basically it's going to be set up to be performed when you need it to be performed. So in this case, this is something where we have the flexibility to schedule it throughout any point in the month and it repeats every three months. So the system is designed to prompt you to create those jobs every three months. In this case, the description that's listed out here is right there.

--- Quote templates ---

SUSAN

25:06 As well as you've got your commonly used parts and labor that's on here that can be part of a template. So if this is something that you're doing pretty frequently when you're initially, you know, setting up planned maintenance or really anything that you're doing more than a couple of times, you can create those service templates and it's automatically gonna bring in this description as well as these parts in labor.

--- Assets ---

SUSAN

25:29 And then you can make those edits one off there as well. Down here. We'll go through most of these pieces when we actually dig in on the mobile app. But just in terms of the accessibility, you know, here would have all the assets for this particular location. But this is a specific asset that we're servicing. If you had multiple services and multiple assets, they would all appear here. I'll show you this on the mobile app, but just know that you can always click into this and see full history every single work order that's been performed on that, all the quoting opportunities that have been generated from this piece of equipment as well as any sort of files, diagrams, manuals, any sort. Of PDF attachment that would be helpful. And so...

KEVIN

26:18 How do you choose that asset now? I mean, is this asset under an agreement or is this asset just under the?

SUSAN

26:24 So this asset is under the customer. When you go into the locations pages, you would select which asset meets those.

KEVIN

26:32 So when you open up a, yeah, I guess you'll show me when you open up a work order, how you select that?

SUSAN

26:39 I can just show you really quickly through the office because like you would be, you know, if you wanted to... see all of that, is this is everything that's on the location. So go down on assets, that is all of our assets there. And then I've got all of these different services that are set up with these specific time blocks of when they need to be completed by.

--- Quote templates ---

SUSAN

27:05 And so if I want to go in and, you know, kinda manually add a job, I'm able to, you know, I can, of course, you know, create the service on the fly or I can select from an existing one. And then you just select or create the service, and then you select or create the asset and then you just put a... you know, a specific appointment that's assigned to it?

--- Access to information ---

KEVIN

27:29 No. Is that just from the office, you can add that equipment or can you select an asset in the field to?

SUSAN

27:35 You can add assets from the field as well. Okay. So, yeah. So that is the high level overview of the office views, work order. Let me go ahead and join from my phone so we can see what this looks like from the technicians perspective.

--- Access to information ends ---

SUSAN

28:17 Okay. I'm gonna go over a click share of sharing here.

SUSAN

28:36 This is looks like when you log in the service state, I'm gonna go ahead and turn off my camera to slow down the Zoom lag... and it's gonna have all of your appointments listed out. As you can see, this has been converted to a project. So it has my silly project name on it now.

--- Tech On-site ---

SUSAN

28:56 But normally that would just say preventative maintenance visit on there. So you can easily click into that. And it's gonna have that same information that you just saw. But now in a mobile friendly format, generally what our technicians like to do when they first clock into that, when they first, you know, go to this page as they wanna clock in as being in route. So you can just swipe across and then click clock in and that's gonna take a time and a GPS stamp and you can even go in this place and click to notify the customer. And this, you know, you can select from all of that customers contacts they're all save, no additional in. And then you can just look at your GPS and say, hey, it looks like I'm gonna be here at 345, send a quick note and that'll be a nice introduction to the customer. I'll have, you know, the technicians name headshot, if you like, et cetera.

KEVIN

29:54 Like that, if they wanna use that.

SUSAN

29:57 Absolutely. All of this is totally optional. So if you want to go directly into clocking in on site, you can certainly do that if you don't want to keep track of that. But in this case, we'll go ahead and clock out of being in route and we'll clock in as being on site again in their time in GPS stamp.

--- Assets ---

SUSAN

30:20 So here we've got again, that same information. So we click on services. We can see that same description that was in that initial work order. When we click on assets, it's gonna show us that particular asset that we're expected to service on this appointment. But you can also if anyone has any questions about other assets while they're out there, they can head over to all and access that same info about any other asset that's at that location. But just to quickly show, you can click into this or any other asset, you can see service history. So that's gonna be all of the previous work orders that you can access. It will be deficiency. So all those previous quoting opportunities and the status there of and then under files and photos, you can add manuals, diagrams, et cetera. Do you think that'll be helpful for your text to have that?

--- Tech On-site ---

KEVIN

31:15 Yeah.

SUSAN

31:17 Of course, you got some additional demographic information here. And then next step we wanna see what do we need to do to, what do we need to use to complete this job? We've got our job items here. This is, are the same parts labor, job items that we had from the initial work order in the office.

--- Parts management (purchase orders) ---

SUSAN

31:39 But of course, sometimes technicians, to need additional items. They realize while they're at there. So to add any additional items, they can simply click that plus button. They can select from the existing list or add something new in terms of reporting on the source. They can indicate that it's from truck stock by indicating that it's from the technician. If it's something from a parts vendor, they can indicate the source there. And then they can go down to status and indicate whether or not it's something that they were able to procure in the moment. If it's something they ordered and they're waiting on or if it's something they need the office to order, all that info is gonna come back with the work order. And then it's gonna be reportable in an aggregate level as well. So you can run weekly reports to make sure truck stock is fully stocked up. Make sure that we've ordered everything we need to order, make sure that we've rescheduled the jobs where we've ordered something and received it. And we therefore we need to reschedule.

KEVIN

32:37 Say procurement, they can actually create a po from this page.

SUSAN

32:41 Yeah. So POS, with service trade, the way that most of our customers handle the need for sort of tracking with that. So every single job number in service trade is unique. You'll never see the same job number again is even unique across all customers. So way most of our folks handle that. Is they use that job number as the po and they provide that to the vendor. So because it's all going to come back on that same work order and that way it can all be searchable across the platforms.

KEVIN

33:17 So, what do they do? And they're just getting truck stock or something that's not attached to a work order, how do they handle that?

--- Parts management (inventory) ---

SUSAN

33:27 So like just something that has nothing to do with any particular job?

KEVIN

33:32 Yeah, they go in and they just need some, you know, some material, for their vehicle or they just want to grab something they don't have a job work or open and they're just calling it truck stock. How is that handled? Or is there a way to handle that?

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

SUSAN

33:48 So I would say it's a mix with our customers. I would say some folks do that strictly out of their accounting system because they want to kinda disinfiguate like what is because like, the cost of that isn't going to be applied to a job. So they just want it to live in their accounting system.

--- ST app contracts and pricing ---

SUSAN

34:05 And then some folks that really just love service trades reporting, they'll create an internal customer and they can, you know, basically, I hate the word workaround, but, you know, by creating an internal customer and an internal job, they can apply those items to that. But whatever you prefer.

--- Deficiencies ---

SUSAN

34:27 So we've got all of those options there... and let's say there's an issue. We realize we open this up there's. We open this guy up and it's a broken compressor. So in order to report on that, get that information back over to the office. We would just head over to deficiencies, tap deficiencies, and it's gonna show all of the previous deficiencies on this particular location across all assets. But to add a new one, we're gonna click that plus button and we can provide a description here. So let's say it's a broken compressor. And then we found that attaching media really helps, you know, around four to five pictures is kinda the peak for getting quotes approve faster. I won't bore you with four to five but media is a huge help to that. So pictures, video, voice memos, documents, all of that can be attached here. You know, when we think about voice is that can be especially helpful. Let's say it's a really complicated repair and you don't want your text wasting their time typing a bunch of stuff in so they can report a voice memo that will go back over with the office, that will get saved. So once we've got those items in there, we can click next and it's just gonna say how severe is this? Let's say it's making it inoperable? And we wanna make sure that it's tied back to the correct asset. So it's nice and organized. It will auto fill the service line. This is a new deficiency and if they want to, they don't have to, they can provide a proposed solution. Let's say they're recommending that we replace it. So in just that short amount of time, we've done everything that we need to do on our end as the technician to... be able to.

SUSAN

36:25 Fully access that job.

KEVIN

36:28 And who does this? Go back to you? This just goes back to the office now. So...

SUSAN

36:34 It does. Yeah.

KEVIN

36:35 You can assign it to different people.

SUSAN

36:38 So, yeah, the email notification that a deficiency has been found... that you can set to go to whatever email address that you like.

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

SUSAN

36:53 So let's go over here. Just gonna go ahead and pull up this deficiencies page. I want to display this. And so when they click on that email... this will go to this deficiency details. And just know that if you ever want, you know, if someone calls up and you don't wanna, you know, do the whole Northboundary shebang.

--- Deficiencies ---

SUSAN

37:14 You can also do this deficiency process from the office view. If someone just wants to describe an issue to you without sending a tech out, but we'll review all of this information here. We'll review those attachments... and we can listen to that audio memo, pull some information out of that, review, the pictures, let's say, you know, we listen to this audio memo and got everything we need off of it.

--- Quote templates ---

SUSAN

37:40 We definitely want to keep the pictures. We can do that and we can go ahead and add this to a quote. So go ahead, click here, click replace quote and we are doing some... maintenance in our demo environment. And I was warned that there is a 20 percent chance that this could happen. So let me just show you an old quote to show you what quotes look like.

--- *Quote templates ends* ---

KEVIN

38:05 You're just creating this quote in service trade. It's not going back to Northboundary right now.

SUSAN

38:13 That's correct? Yeah, this really the, when they're designed to work in tandem... you really want, you wanna keep your kind of like big maintenance, you know, your plan, maintenance proposals, your big project proposals, those live in Northboundary, you execute on them and service trade. But then, you know, little repairs, things like that. It's just so much easier to quote out of service trade because it's just really quick kind of thing. So let me do a quick search for that. Would help if I spelled this correctly. All right, the customer name is here. So night Dale, I'll do a smart search on that.

--- *Quote templates* ---

SUSAN

39:02 I just got.

SUSAN

39:11 So here is an existing quote and this is basically let's see if it'll let me copy it. So basically, what would to kind of get you to this point again? Apologies for the maintenance that we're doing in the back end. But you would basically be able to apply a quote template. So, you know, all the information would carry over. But, you know, let's say that broken compressor is something that happens pretty frequently in that compressor replacement is something we want to build a template out for. So we're then able to, you know, have that come over that description, the parts and labor etcetera. You can go in here and change the way that this gets displayed. So if you want to have it group by service, do grand total only etcetera. You have all these different options and then you can change that view.

KEVIN

40:01 The template that you said brings in the description and brings in the detail of labor and items as well.

SUSAN

40:09 Yes, sir. So it's gonna be this little section right here with the description. And then it's gonna be the parts and labor area. Of course, you can adjust those as needed.

KEVIN

40:19 Now, are you gonna show me what that looks like when it goes to the customer?

SUSAN

40:24 Yes, sir. And no, that photo would be on there as well. So... let's see, you know, just wanna quickly... grab something.

--- Deficiencies ---

SUSAN

40:43 You're gonna get a picture of me holding a goose as, the photo that gets attached here. But yeah, I'll definitely show what that looks like... to the end. Customer may have selected too large of a photo from my internet connection. We'll carry right along. Okay? I'm not gonna wait on my goose photo.

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

SUSAN

41:09 We'll go ahead and send that to the customer. And we here we can, you know, select from all of your different company contacts... you can select all of these different folks. And then it's gonna have that in your main message. If you need that extra layer of accountability for some customers, you can ask them. You can require them to enter in a po for approval. We can toggle that button. Let's say, I'm gonna send this to this, I'll send that on over to the customer.

KEVIN

41:41 Those are the contacts within that service agreement, right?

SUSAN

41:47 Yeah. So the contacts would come over from the service agreement and it'll have, you know, all the titles, all that stuff. So you can make smart choices around who needs to receive that. And then in terms of what it actually looks like, once they open up that email, it's gonna be your brand. Front and center to ship twos. Here. We've got description, the parts and labor laid out the way that you indicated you wanted it right above the TS and CS would have all your pictures right here. And then from there, it's super easy for folks to click the green approved button if they would like to approve it. Of course, you know, if they want to request changes, they can click the request changes button, triggers an email. You can choose to modify that however you like.

--- Deficiencies ---

SUSAN

42:27 But generally, you know, having a good portion of a good amount of pictures, video etcetera down there, it's going to help you get those approved a lot faster because they can first see the issue that's going on is, you know, attaching photos and stuff to quotes. Is that something that's relatively easy to do infusion?

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

KEVIN

42:46 Yeah. That's one feature that is.

SUSAN

42:49 Good. So, yeah. So after they approve that, I'll just kinda manually approve it here. It's really easy. All you have to do if you want to go ahead and perform this work, you can click the green, you know, create job from quote button.

--- Quote templates ---

SUSAN

43:05 You want to create a brand new job. If you want to add this work to an existing job, you know, they're going out there, they're going to be out there for a while. It's easy to do that. And then it's gonna basically just turn into a, you know, a whole new job.

--- Quoting ---

SUSAN

43:16 And the only action you're gonna have to take is actually just scheduling it out on the correct technician at the correct time. So there's no double data entry there. But, in terms of, you know, kind of general reporting, some of the reporting, you know, definitely like to highlight here in terms of quotes. And this is also available for invoices as well. A lot of our customers will run a weekly report, for example, of course, you can run out any of these parameters on, you know, for example, quotes that are more than 20 days old or quotes that have just expired. I, you can run those reports and then send messages to whoever that applies to if you want to send them a friendly reminder. Hey, would you take a look and potentially approve? And you can do that same functionality with invoices. If folks haven't responded to an invoice in service trade. Yet... all of that would be right there. And then also another helpful reporting area. Of course, you know, you can run a variety of different reports. But something I always like to highlight is our tech scorecard. So this is just an easy existing report that you can have on last month.

--- Tech time tracking ---

SUSAN

44:34 So there's a little more data in there, but you would have your five technicians up here and you can easily run a report and see how much time they spent in different categories of work, but also how many onsite visits they had, how many late appointments, how many missed appointments, and then perhaps most importantly, how much revenue that technician is bringing in for that specific block of Tom.

--- Tech time tracking ends ---

SUSAN

44:56 You think that might be helpful in terms of getting your some visibility in terms of tech productivity. Yeah... very good. So, yeah. So that's quoting a little bit about. I mean that's quoting reporting. And then, so this piece of the reporting as well. But we do need to get back to our technician and have them finish out the job, head back over here.

--- Deficiencies ---

SUSAN

45:27 So we've just finished reporting that efficiency. And this is where, you know, if they want to for example, attach before and after pictures they could. Do that through attachments and apply labels to that. If they wanted to put in specific comments for the office to review, they can go into comments and do it.

--- Forms ---

SUSAN

45:48 Do you ever have specific forms that particular customers want you to fill out? Like, you know, certain PDFS that they expect technicians to fill out anything like that?

SUSAN

46:03 And if they're bringing physical paper to jobs at all still sometimes.

KEVIN

46:08 No, we are, we're mobile with everything really.

SUSAN

46:12 Good. Well, if a customer ever said, like when you're out there, I want your text to fill out this special PDF. We have a cool function called blank paper. It'll basically open it up in Adobe auto, fill in some, you know, easily autofill able fields, you know, like the name of the customer etcetera.

--- Tech On-site ---

SUSAN

46:29 And then all they have to do is, you know, check some stuff. Another question about tech experience. Do you guys require or would like to require sometimes onsite signatures?

KEVIN

46:41 Yeah.

SUSAN

46:44 I'm sorry. Was that a yes or no? Yeah, very good. So, in order to do that, unsurprisingly, all you have to do is click create work acknowledgement.

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

SUSAN

46:53 So your technician is just gonna click on that and then select the contact that's gonna be signing. I'll select that there. And then they can review all these different pieces that you see. And then from there, they can just easily click review. They'll toggle that they understand, the TS and CS, it will auto fill in their name.

--- *Access to information* ---

SUSAN

47:18 So no additional typing from your customer. And then they can finger sign and that's gonna be sync back up with the work order?

SUSAN

47:32 So, we've done all of that. Any other mobile app related questions before we clock out of the job?

KEVIN

47:42 From a mobile standpoint, in tasking, do you guys have any of that currently in ServiceFusion for maintenance? Or is that all still in north?

--- *Access to information ends* ---

SUSAN

47:53 Do you mean like some sort of checklist functionality? Yeah. So in service trade core as we call it, it's gonna be what needs to be performed at that particular service is gonna come over as plain text and it won't be individual checkmark boxes. So it will just be the expectation of this is what you're expected to do. These are your tasks at this particular appointment?

KEVIN

48:19 Where, and that comes from Northboundary?

SUSAN

48:23 Yeah. So this, and specifically how it looks, but the way that, you know, is a question for events, you know, when he actually shows that. But the specific tasks like, this is what we call our services area that live in there. That is part of what comes over from Northboundary, so there's no necessarily like retyping it... but definitely something like I am by far not the expert of what that's actually going to look like when you say, yes, I sold this.

--- Tech On-site ---

SUSAN

48:58 Now. Let's create the job and ServiceTrade. Yeah. So in order to clock out of this job, we're just gonna go down here and click clock out. And it's going to have that extra layer of accountability for your technicians where if there's multiple services on this appointment, they'll have to check and say, yes, I did all of these different services. So we can go ahead and click next and here if they just want to clock out, but let's say there's an emergency or there is an important part, they were missing and they weren't able to finish it, they will put, no, leave the appointment and the scheduled list. If it's something. In this case, let's say we did everything, we had everything, we can move this to the completed list. And there we can finish clocking out. So in terms of what that looks like when we had back over here to leave the site?

SUSAN

50:04 We'll head back over here to this job.

SUSAN

50:14 So now the status of this appointment here has changed from schedule to completed. So now we can go in here and review all of the information. We can see these clock events have come back. This is a great way to make sure that the labor that we're charging is appropriate based on the amount of time that was spent here. You can see that we went the extra mile. We reported that deficiency and we've got that work authorization right there. So we've reviewed everything. We wanna review. It's all looking good. So in this case, let's go ahead and complete the job and invoice it out. We can do that.

--- ST app contracts and pricing ---

SUSAN

50:56 And then it's gonna ask us. Do we want to invoice for all these items? Yes, we do. So this is our invoice preparation screen. Again, you can see internally only that margin on that job. In terms of pricing is generated. You know, all of your, you know, pricing rules are gonna, you know, come over as well. But if, you ever have something that isn't connected from north, you can create pricing rules in the back end. For this case, we've got a pricing contract which is in Susan pricing contract. And that's just, you know, the ability to have different pricing bands for different tiers. You can have certain items that calls certain things.

--- Quote templates ---

SUSAN

51:39 It's going to create those rules. So you're not having to do any of that math on your own. Again, just like with quotes, we can change the way that this gets displayed to the customers. All these different options here. All that's looking good. And we're now comfortable, we can go ahead and send this over to the customer.

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

SUSAN

52:00 So we can click here to do this, send invoice. I'll show you what that invoice looks like. And it's going to be pretty standard invoice. You know, your brand description of what you did, all of these items here. But the real value of our invoices, I feel like is when you click on this service details button and keep in mind, you can send this before or before during after the appointment to just show exactly what's current neatly been done or what's about to get done.

--- Tech On-site ---

SUSAN

52:35 So that description of the work, the appointments, all the parts and labor that were used if you wanted, you know, if you want to add a specific comment from the tech or the office, you can easily have that in there that work authorization. You can see how we went the extra mile and reported that efficiency, all that would be there.

--- Invoicing ---

SUSAN

52:54 And then you can even see the timeline of when, of everything that was performed. If you want to turn that function on a, and then they can just click the big green pay now button to pay. That can run through AC, H or credit card. But, you know, kind of thinking about this invoice.

--- Invoicing ends ---

SUSAN

53:12 You know, is this something you feel like would be beneficial to be sending to your customers compared to how you're currently invoicing?

KEVIN

53:21 Yeah, seems, I mean quite similar, in the way of being able to pay for it and the description of work. So.

SUSAN

53:32 Good. So now that we've got paid for this job, I know we're a little bit, you know, coming up close on time in terms of options, we can dig in a little bit on scheduling or we can quickly go over... pricing. What, what would you prefer if you have time we can do both?

--- Dispatch ---

KEVIN

53:58 Yeah. Let's let's go into scheduling.

SUSAN

54:02 Okay. Sounds good. Head back over here. So we have two different ways that you can well, really three, of course, you can all cart schedule on individual jobs. But in terms of... our specific scheduling areas, we have our map scheduler and that's really design or thing that's in advance whether that's a project, you know, install project or if it's a plan maintenance visit, anything that you know about well in advance, we recommend running through here. So this is our map based scheduler. So right here, it's gonna show us all. In this case, we've got set up for all of our jobs that are due in this particular month. A lot of these are already scheduled out. So you can see for example, this purple one. We've got our two technicians that are on it when I scheduled because we've got the little calendar icon baked in on there. But in this gray one right here, you know, when you first initially generate this, if you don't have any appointment set or any technicians assigned, it's really easy to make sure that you're doing appointment generation. That makes geographic sense. So, for example, you know, we can drag this gray dot over, for example, assign it to sell, that will then turn blue. And we can just drag it onto the calendar for wherever you like. So that we can do this. Is now assigned to Shelby and let's say it looks like she doesn't have any other appointments on Wednesday. So I can just drag it on a Wednesday. And then from there, I can click into that, make edits et cetera. But you can now see how it went from gray to blue with an appointment... so that it's our more proactive scheduling option. And then when we get into more reactive scheduling and see if you ever have to, do, you know, kind of those last minute repair somebody calls up with an emergency. You can head over to our dispatch board and that's gonna be for really anything that you just want to see that day by day, where is everybody at? And can throw something on the schedule. So in this case, you know, someone calls up and they say, hey, you know, you think you get somebody out there real quick, you know, today or first thing tomorrow. So you can see day by day, you know, who's currently available. And then to add a job is going to do a predictive search here. So you don't have to retype any of that stuff in. And then you can just easily look across and figure out which technician I want to assign that to fill in all of this information to go ahead and quickly get an appointment. On the calendar.

SUSAN

56:50 And then once that's in there, you can easily drag this across, make it longer. You can assign it to a different technician. It's all color coded so you can see what types of work are being done. And then you can see on these lines down here, where everyone is at based on their most recent clock event. And... do you think that would suit your scheduling needs?

KEVIN

57:13 Hey.

SUSAN

57:13 Good. And then finally, I like to end at the beginning. This is what it looks like when you log in for the day from the office and service trade. This is our service dashboards got, of course, your daily schedule along with some little statuses on what is going on with these, whether they've been a complete or not, how much of the work has been done. You can see where all of your techs are based on their most recent clock event. All that's going to be listed out up here and then overdue jobs without appointments. That's going to be places, you know, where, you know, when you set up the service, for example, you've promised them that you would be out there at some point before may 20 second, and never created an appointment for it. If anything existed like that. I would live here. Same deal with jobs with out appointments that are due in the next two weeks that are pretty urgently actionable down here. We've got our past jobs to be marked complete. This is where the technician has done none, all some of the work but the office needs to go in and review and just make sure, hey, should we go ahead and Bill out for this? Should we reschedule it? And then down here, we've got completed jobs to be invoiced. So the tech is marked a complete. The office is marked complete, but we've got money sitting on the table because we have not invoice it out just yet. So that is the high level overview of service trade. We'd love to know your overall thoughts. What I didn't cover, turn the floor to?

--- Customer engagement ---

KEVIN

58:48 So two things would be reporting and then customer portal?

SUSAN

58:53 Yes, the customer portal and report. Yes. So let me show you the portal really quickly right over here.

--- Customer engagement ends ---

SUSAN

59:10 See, does it wanna make me log in? This might be part of... let's see that is part of our plan maintenance that we're doing right now. Doing it. Well. There we go. Okay. Sorry, no, it's my internet that's slow. So when they log in, this is what it will look like.

--- Dispatch ---

SUSAN

59:29 When they log in, you can see if there's any jobs they have on any of their locations that would live there, any upcoming jobs recently completed. And there's recently completed. You can click on any of these job numbers and it's gonna take you back to that service link that you saw before.

--- Assets ---

SUSAN

59:44 Anytime you click on an invoice amount, it will take you back to that particular invoice and service trade. And then if they want to go in and request specific request service on specific assets, they can certainly do that by going over locations and assets. So you can choose your location from, you know, let's say we had a customer with five different locations.

--- Recurring maintenance ---

SUSAN

1:00:08 You can choose that, and then you can select from the assets that are there and then request service on that particular asset. If they go in and request service on it, it's going to generate basically it'll notify you of course, but it'll also just basically create a job within service trade and it's up to you to of course, choose whether or not to work it, but also schedule it out.

--- Customer engagement ---

SUSAN

1:00:34 And you can of course see any previous efficiencies or quotes here. So that's our portal is this kind of in line with what you're expecting in terms of customer portal.

KEVIN

1:00:44 So they can see everything that's open and everything that's upcoming. And then they can actually go into a specific asset. If they want to look at history would say that as well.

--- Customer engagement ends ---

SUSAN

1:00:55 So on this asset, you can request service and then see deficiencies and service.

KEVIN

1:01:02 Yes, sir. All right.

SUSAN

1:01:08 Now, in terms of, you know, you mentioned reporting, is there a specific, and then, you know, I'm also gonna in terms of like there isn't like a, let me click on the reports area of service trade.

--- Tech time tracking ---

SUSAN

1:01:20 But, you know, you can certainly run a vast array of reports on any kind of specific areas. So, for example, a common report that a lot of folks run, you know, when it comes to jobs, you can easily export all of the, you know, clock events for payroll that's something that's super helpful.

--- Dispatch ---

SUSAN

1:01:42 So you can go in and run a report there. And then, you know, any upcoming appointments, you can run that, see all upcoming appointments. And then you're even able to send a little friendly reminder based on upcoming appointments through here. And then when you go into jobs, this is something else that I'd kind of hinted at.

--- Parts management (purchase orders) ---

SUSAN

1:02:02 But you can run those reports where, you know, parts that are overdue for delivery parts that are ordered but not yet received and complete services, all these different options here. For example, we can let's see if this turns anything up. People have been indicating this. So there, you say, hey, you know, this says these parts are overdue.

--- Assets ---

SUSAN

1:02:25 So call the vendor etcetera. So those are options within the job screen. We talked about the reports that are available for quotes and invoices. And then, you know, if you just want to kinda look up... any sort of particular assets, particular locations, you know, that's gonna also have...

--- Assets ends ---

SUSAN

1:02:48 Credentials like that you can kind of key in there. But, you know, I do want to be clear there isn't like a, this is a big screen that we have with a general pie graph, of things like that. But another piece that might be helpful in terms of big picture reporting is, you know, on these pricing contracts. So, for example, I don't know if I necessarily showed this very well. I think you already know about that. So to show you that one that I was using before when I click into that and view it. So, you know, let's say we're using that for this particular customers plan maintenance.

--- ST app contracts and pricing ---

SUSAN

1:03:26 You can see that this is how much invoice amount that we've invoiced so far. And then the actual margin on all of these.

KEVIN

1:03:35 So just that entire contract. Yeah, it doesn't give you hours used or it doesn't give you hours to estimate or anything like that?

SUSAN

1:03:48 Let me make a note about that.

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

SUSAN

1:04:00 I just, I was just jotting that down. So the other piece... when we talk about reporting is there is the ability you know, to in service trade with our highest tier level, our enterprise level. I'm not sure if you took a look at our pricing page, we, have you ever heard of Amazon quick site?

--- Implementation and ongoing support ---

KEVIN

1:04:24 No.

SUSAN

1:04:25 So, Amazon quick site is the partner that we use. And basically what that does is, that can create the big nice pie charts and graphs. And, you know, that visualization of like here are a bunch of kind of key reports that are accessible. So that plan does come with, you know, a few kind of like pre existing reports.

--- Implementation and ongoing support ends ---

SUSAN

1:04:48 And then if there's a special report that you want in there, you know, you can scope that out with our engineers, but kinda the basics of, you know, I can certainly ask if those components are baked into that. However, that is something it does significantly increase the price.

--- Implementation and ongoing support ---

SUSAN

1:05:04 You know, if you take a look at our pricing page, the plan that I was going to generally recommend for you is our premium option because it's going to have all these great project management features that we went over. It's gonna give you access to that portal. And then, you know, you can get additional support and see, the contract prices. All of that. They are multiple TSS are a never bad thing to have. And then of course, you're going to have that 24 seven support instead of just business hours. So that would be my recommendation. But however, we do have our enterprise plan and that's gonna come with the business analytics reporting, there will be those few preexisting reports that will show up on a page and then, you know, anything that is special you want created? You know, we can scope that as I mentioned.

--- Purchase decision ---

SUSAN

1:06:03 But yeah, does it make sense to put together a quote kinda talk pricing now?

KEVIN

1:06:12 Well, I think it's going to be crucial that I jump in on, this Vince?

SUSAN

1:06:21 I agree. Are you? Yeah, yeah, because, the connection is going to be key. I completely agree his next one.

--- *Purchase decision ends* ---

SUSAN

1:06:30 I hate that a little bit short notice here. His next one is tomorrow at 11 a. M. And they're already discussing this issue 11 a M. Eastern. Okay. Are you available then? Because the next one is the thirtieth at 11 eastern?

KEVIN

1:06:48 Just check in.

KEVIN

1:06:54 Let's...

KEVIN

1:07:33 I think I could set the 10.

SUSAN

1:07:36 Perfect. Let me go ahead. I'm gonna go ahead and get you signed up for that. So standby for calendar invite... it's designed for outlook. So if, let me just do this while I have you really quickly... let's see you... today... grab your email address. I'll go ahead and get you signed for that. But yeah, any other questions, anything like that?

KEVIN

1:08:16 Yeah. I mean, the reporting was one of the things I'd like to see what, what's included with that, you know, top to your package... because reporting right now out of ServiceFusion does seem similar to what you guys have right now. It's it's almost like creating your own reports. So to speak right? With your own parameters, it's not pre generated reports. So I would like to see what that looks like.

SUSAN

1:08:51 Absolutely. Yeah. I will make a note to report back on those. Any other information I can find?

KEVIN

1:09:03 Integration... is boundary here. Those are kind of the hot topics?

SUSAN

1:09:13 Good. All right. If you wouldn't mind if you could just really quickly check your email and make sure that invite came through for tomorrow?

KEVIN

1:09:27 No problem.

--- Purchase decision ---

KEVIN

1:09:40 Yes to.

SUSAN

1:09:44 Fantastic.

KEVIN

1:09:44 All...

SUSAN

1:09:45 Right. So I will take the action. Perfect. So I'll take the action to find the included reports. Also kinda put together a brief overview about what we talked about as well as send you over a recording of this as well as information about the onboarding process and how it integrates with Quickbooks. So all of that will be in a short little deck I'm gonna put together for you. You're going to attend, the webinar tomorrow? And we, in terms of, you know, decision process, are there other folks that are on your list? Like I've got to look at this before I make a call?

KEVIN

1:10:25 Yeah. Do, was the next one on my list?

SUSAN

1:10:29 You haven't demoed yet, but.

KEVIN

1:10:31 They did a quick demo, but they, we was short cut short. We gotta do another one.

SUSAN

1:10:37 Okay. But other than tighten and BuildOps now analysis on the gotta check out before I make a call. Okay. Well, what I'm wondering it might make sense because you know, one, you know, generally check in after, you know, I send you the information that you talked event. So you see what else is out there. We'd love to find some time, to get together with you when all that stuff is done, you know, just thinking about that to quickly meet.

--- Purchase decision ends ---

SUSAN

1:11:05 Would that be something that's a week out two weeks out? What, what are you thinking in terms of the amount of time it would take to get that done?

KEVIN

1:11:11 Be a week?

SUSAN

1:11:12 Okay. So next week is the week of the 20 ninth American memorial day that throws out that Monday. But otherwise, I'm generally pretty open, what works well for you Tuesday through Friday?

KEVIN

1:11:34 Let...

KEVIN

1:11:47 Probably Wednesday 30 first.

SUSAN

1:11:51 Wednesday, the 30 first, I have an 11 eastern already on my calendar, but I could do... one eastern all the way. Yeah, one to three. Would any of those times work for you?

KEVIN

1:12:09 She's...

KEVIN

1:12:19 Yeah, one o'clock New York.

SUSAN

1:12:21 One eastern. Okay. One eastern... on the 30 first. My gosh. And then after that is going to be June where's the month going... very good. Well, like I said, I'll get all that over to you as well as a calendar invite for the 30 first. And yeah, everything goes well tomorrow with Vince. I'll you know, ping him and let them know that you, you'll be joining in, you know, the types of questions you'll be looking to see. We should be good to go. Perfect. Awesome. Well, it was a super nice meeting you. I really appreciate you taking the time and we'll be to chatting soon.

KEVIN

1:13:04 Sounds good. Thank you.

SUSAN

1:13:06 All right. Thanks. You have a good one.

KEVIN

1:13:08 You too. Bye bye.

The End