



# Followup ServiceTrade Demo with Dual Fuel Corp.

Brett Griffith with Dual Fuel Corp  
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## Participants

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# Transcript

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BRETT

0:00 Yeah, that's...

KURT

0:00 Fine. I'll probably.

BRETT

0:04 Get annoyed and turn it off at some point, but can start... understand?

BRETT

0:18 So...

KURT

0:18 Is that dashboard that you use? Is that like your updated dashboard?

BRETT

0:25 What do you mean?

KURT

0:28 The... pod one?

BRETT

0:33 Yeah, I don't really use that. I just use open ops. There's. A lot of stuff on there that I don't know what it does, so.

KURT

0:42 Mate.

BRETT

0:45 Don't touch it. I've got like 18 dashboards people are making for me left and right? And I'm like, I just manage it all in my head to be honest, which is bad. So.

KURT

0:56 Demos missed her.

BRETT

1:01 How's Lucas been for you?

KURT

1:08 He scheduled something for... Thursday last week. The guy didn't show.

BRETT

1:15 That car Michael?

KURT

1:16 Yeah.

BRETT

1:19 Running that company before, and they never show.

KURT

1:21 Yeah... I just expressed my views about Canadians.

BRETT

1:29 Yeah, no, I'm right there with you. I talked to a lot of Canadians at the HR show and...

STEVEN

1:33 Someone will call you won't be.

BRETT

1:35 But all went well.

KURT

1:37 Yeah.

--- Pricing ---

KURT

1:42 It's just the pricing. It's hard enough. The pricing is just...

BRETT

1:50 Yeah, it's... yeah, I agree. I haven't sold a Canadian company in a while, like two, three years. I had one big one but they turned, so it was great.

KURT

2:05 Yeah, yeah.

BRETT

2:09 Not trade force tech. That was my, I did have a 40 K deal.

--- Pricing ends ---

BRETT

2:12 They're trade force tech. They're a really good customer, cool mark mechanical maybe was the one that turned. And it was right. When COVID started, they signed like three months before, and then COVID hit and they were like, we can't pay you?

KURT

2:25 All right. So.

BRETT

2:28 I don't know what happened there.

BRETT

2:40 Let me see. Working with this food equipment company up in Connecticut. They're looking for reference, commercial food equipment, commercial, refrigeration, anyone come to mind for?

KURT

2:52 You...

KURT

2:57 No...

BRETT

3:00 I...

KURT

3:01 I mean...

KURT

3:07 No closing at view is a prospect. Make that is kicking time. I'm not gonna make a decision to fourth quarter. So, yeah.

BRETT

3:15 Yeah, no worries. We'll figure that one out later. Hey, Steve, how you doing?

JOSEPH

3:21 Good. How are you?

BRETT

3:23 Doing well. Thank you for asking. Thank you for being here.

STEVEN

3:27 Worse... just you today.

BRETT

3:31 Even Joe joining.

STEVEN

3:33 Or...

BRETT

3:35 Simon, excuse me? Yeah. Okay. I did see Joe accepted the invite. I don't know if he's gonna join at some point, but...

STEVEN

3:43 We shall find out on.

BRETT

3:47 Right. How was your weekend?

STEVEN

3:50 Was good weekend was good. What about you? Yeah, I...

BRETT

3:55 Was good. I was kinda sick this weekend, so I do much.

STEVEN

3:58 Really?

BRETT

3:59 Okay. Relaxation is always a good thing.

BRETT

4:07 Making sure I got everything set up for you guys. Hey, Simon. How are you?

SIMON

4:13 Good. How are you?

BRETT

4:15 Thank you. So, Simon, I saw Joe accept the invite. Do we wanna wait for him to potentially join in?

SIMON

4:25 No, let's go ahead. Okay. I think he'll join at some point, but let's go ahead.

BRETT

4:31 I'll keep my eye on it. And then Kurt, it's just been up his camera off. He's got some bad wife I, today, but he is on the call with us, so.

--- Purchase decision ---

KURT

4:39 Hi. How are you?

STEVEN

4:44 My...

BRETT

4:44 Plan for today? Is I'm actually gonna pull this right over here. So here's our agenda for today. Let's you know, go through all those questions. You guys had the things Curran I couldn't answer last week. We do want to show you the service time card, which is essentially Simon more on your side, but the approval process for time for payroll, we will review a little bit of implementation kind of what that would look like for you guys.

--- Purchase decision ends ---

BRETT

5:06 And then I'll give you an update on references right now, Steve, I sent you an email this morning with Brad bogs connected to it. Actually, I sent the email to Brad with you cc'd on it. He's good to go ready to be a reference for you there down in Atlanta, Georgia. They do both hvac and boiler work for California boiler. They're actually on a meeting with one of my ams right now. So the am is gonna ask them about a reference call today, and I'll get back to you on that.

JOSEPH

5:33 Sounds good.

BRETT

5:35 Awesome. So what I did guys is I just took one of your customers from that list you sent me, Steve, and I put them in the service trade so we can keep everything



clean.

*--- Deficiencies ---*

BRETT

5:43 And kind of what I have planned for today is let's go through actually logging deficiency, turning it into quote and let's see the status change every time. Because I was thinking about our meeting last week, we got really confused because there's all these different statuses and resolutions severity and things like that.

*--- Deficiencies ends ---*

BRETT

6:00 And I think the point in that is we do have 1,100 customers. Different customers are gonna use different things. So we need to figure out what's gonna work for you guys. So came in here. I just took two locations from abc management. We're going to be working at 173 bleak today.

*--- Recurring maintenance ---*

BRETT

6:16 So I have that pulled up. Let me actually pull some of my other screen so I can reference it... and just a couple of things to show you. So services like we mentioned last week services, the actual task that you're delivering that you agreed upon with your, on your contract with your customer.

*--- Assets ---*

BRETT

6:33 So I know this is not your words. This is my words, but I just simply put in one task that we perform. Does that make sense?

STEVEN

6:41 Okay.

BRETT

6:44 Under assets, I put your burner and your boiler in here. Your boiler is your parent asset. Your burner is your child asset.

*--- Assets ends ---*

BRETT

6:51 There wasn't much information on the spreadsheet. So I didn't put much information in. So that said... I set up a job for us to do today. We're doing a service call out in the field. So let's go ahead and let's actually log in efficiency.

BRETT

7:13 Or just gonna go, this does not work.

STEVEN

7:18 Mature don't happen by the way?

BRETT

7:21 Let me do that again. Thank you for pointing that out.

STEVEN

7:27 A little...

BRETT

7:27 Bit loud.

*--- Deficiencies ---*

BRETT

7:39 There you go. You seeing that move now?

STEVEN

7:40 Yeah.

BRETT

7:42 Okay. So I'm just going in logging to efficiency. We're just gonna rock with. This doesn't work right now happens don't really matter right now going in and marketing the severity. So as the technician, I'm saying, hey, this is deficient. And then I'm tying it to the building and I'm picking boiler as my service line... marking it as a new deficiency. So back in my service trade app, I actually made a mistake. We are working at the one or seven Queens boulevard location.

BRETT

8:18 So in here, under deficiencies, there's that deficiency. I just reported, this does not work, but this isn't where you guys are typically gonna go find those deficiencies, you're gonna come in and run a report. So I put the abc management in the one seven Queens in my office. So you guys aren't seeing stuff from 2014 for my demo account. So it's gonna be really easy to just run a report at the bottom. There's. My, this does not work. The status is new and the resolution is new. So we're kinda gonna go through the deficiency like life cycle right now. So with this deficiency, when I go to create a quote from it, it's gonna change the status to verified and the resolution to out for quote. So let's do that.

*--- Quoting ---*

BRETT

9:11 All right.

BRETT

9:17 And I'll just send this to myself. So when I do in fact send that to myself, let's see what it's changed because it was new before... now. It's verified out for quotes. So those are automatic changes that service trade is making for you guys. That is something we can change on the back end if you don't like it. But how do we feel so far?

--- Quoting ends ---

STEVEN

9:38 Yeah, that's...

JOSEPH

9:41 That's better.

BRETT

9:43 Okay. Yeah. I know we're getting crazy confused. We were talking about resolutions status severity and I was sitting there like I don't know what's going on. I've worked for four years, what is going on in my brain. So I just took the time to let's go slow with it.

--- Quoting ---

BRETT

9:56 I think that's best. So next stop the quote is actually going to get approved by the customer. So let me go, approve that.

BRETT

10:08 That's a... groove quote. Now going back to deficiencies, I don't think anything's gonna change it's. Not because it's not a deficiency anymore. It's now a quote. So we would go into run a quote report tied down to Brett office.

STEVEN

10:28 I...

BRETT

10:28 And here's that quote that we just got approved there's, your approved stamp that you want. It's not going to be on the deficiency. It's going to be on the quote because the deficiency is what your tech is finding in the field. Once the office interacts with it, you're turning it into a quote, right?

--- Deficiencies ---

BRETT

10:43 So I think that's where we were maybe getting a little confused as well. So the customer approves the status of that deficiency is verified and the resolution stays as out for quote as we saw on this report... from here on that deficiency. Once you guys actually fix it, the deficiency is going to be tied to the quote.

--- Tech On-site ---

BRETT

11:05 So if we pull this open... my deficiency is right there. So once you guys create the job from the quote, creating the actual work orders, I send my technician.

STEVEN

11:16 Let's do.

BRETT

11:16 That... and your technician or you schedule this for your technician, excuse me, and your technician goes out and does this work.

--- Deficiencies ---

BRETT

11:29 The person that is reviewing all of this in the office comes back to the initial deficiency and marks it as fixed. You can do that on the actual deficiency. You can do it right here. But are you tracking with what I'm doing so far?

STEVEN

11:44 I go back to deficiency. What are the, what options?

--- Quoting ---

BRETT

11:49 Your resolutions? So I'll just grab them all. I wrote them all down just so we would didn't run into this again. So new, I mean do feel not acted on it out for quote. I sent the quote. The, I sent the quote to the customer notified means the customers viewed it, they might have not approved it yet.

STEVEN

12:16 That's gonna happen once they see it in their email.

BRETT

12:19 That's correct once they open it because we're tracking who views quote to approve quotes. Once they open it and view, it will automatically change to notify... out for repair. Means the quote was approved by the customer and we've created a job to go and fix it.

--- Deficiencies ---

BRETT

12:38 From there, you guys go do the work. Once you do the work, you're gonna change the status of that deficiency from whatever it's in likely out for repair to fixed just like so. And that's how you guys on the reporting end and the back end will know that, hey, these deficiencies have either been acted on are quoted out or have been fixed by you guys. Makes sense?

--- Invoicing ---

JOSEPH

13:03 Yeah. So.

STEVEN

13:04 What, let's say we send something out, it gets approved, right? Then we send out an invoice for a deposit. And then once the deposits received, we'll like create a job or can we create a job and not assign?

BRETT

13:19 I would create the job and not assign it that way you're making sure everything's out there, and then you would just run a report for show me all the.

--- Quoting ---

STEVEN

13:26 Status and turn out to repair.

BRETT

13:30 Out for repair, correct?

STEVEN

13:32 That's right when we create the job even if it's not actually assign.

BRETT

13:36 Correct. Because we're looking at the deficiency resolution, the job can still be unscheduled. It can be scheduled that's the job status, not the deficiency status.

JOSEPH

13:50 Okay.

BRETT

13:53 So that, that's kind of exactly what I would recommend. I would say you guys have a response time of three hours on deficiencies. You wanna get every quote out,

get the quote out within three hours from there. Do your thing, get your deposit, put it in service trade, and then I can run a job report for show me all the unscheduled appointments.

--- Quoting ends ---

BRETT

14:13 These would be all the outstanding jobs that you've already created inside of service trade, but haven't been scheduled to your text... and that would be, hey here's. A list of jobs, just go schedule and do what you need to do.

BRETT

14:31 That's really the, that workflow that we just went through as far as step by step that's really the biggest thing I wanted to show you guys in today's, meeting because that's where we got hung up for at least an hour on our last call.

STEVEN

14:45 Is... say it again is.

BRETT

14:53 I can't understand you.

STEVEN

14:54 It wasn't not long.

BRETT

14:56 Wasn't that long. I felt like an hour I'll tell you.

STEVEN

14:59 There's a question. I said, it was that.

BRETT

15:03 Okay. I couldn't hear you. No, it wasn't that long, a little bit of exaggeration because our call was only two hours, but it felt like a long time and I was spinning my wheels, listen to that recording man.

--- Quoting ---

BRETT

15:13 I was like, what were we talking about? I don't know. So that's kind of why I listened to it a couple of times to figure out what to.

SIMON

15:21 Yeah... I think.

STEVEN

15:25 Yeah. So, I think this, you know, this makes a lot more sense to me.

SIMON

15:31 So, now...

STEVEN

15:31 It's like as long as once it's approved, you create a job off it, you can easily see that all your deficiencies.

SIMON

15:39 That aren't you know?

STEVEN

15:43 Either like all your deficiencies essentially that out that are outfit quote are the ones that be followed up on to see if they can get signed, all your deficiencies that are new means a proposal hasn't...

SIMON

15:55 Not...

STEVEN

15:56 Yet, so, you know, proposals need to go out and then all that are.

SIMON

16:03 You know, out for...

STEVEN

16:03 Prepare means they need to be fixed and the work needs to be scheduled.

BRETT

16:09 Exactly. Basically, after a pair only thing I'll change there is the quote has been approved by the customer, there might be a job created. You guys just haven't scheduled it yet, right?

--- *Deficiencies* ---

BRETT

16:24 What other questions do you guys have about that if any?

SIMON

16:29 Brett, the challenge that I'm having is this right? So, on the one hand, I think the tracking deficiencies is cool, right? And helpful because... you know, it's just helpful like, you know, somebody goes into the boiler room, the marketing is efficiencies, you know, the person in the boiler room isn't responsible for doing the quote and whatever. So, you know, it's nice to have a, you know, a huge bucket of efficiencies, you know, for us, you know, basically any time somebody goes into the boiler room, you know, they'll end up with efficiencies... right now. We don't really have something that's called deficiencies, right? If there is something that needs to get done, it just essentially becomes a quote, right? And the quote could have, you know, one thing that needs to get fixed or 15 things and it needs to get fixed or who knows, right?

SIMON

17:28 So, my, what I'm trying to figure out is on the one hand, like having the deficiencies and kind of, you know, that level of visibility and everything like that. It's gonna create like we're going to have hundreds if not thousands of deficiencies, you know, pretty quickly given the number of buildings. So we're servicing. Well, we really care about, I mean, on the one hand, we care about the deficiencies, so we know that not all of our customers are gonna resolve all their deficient.

--- Quoting ---

SIMON

17:55 I, we really care about is the quote, right? And the quote may just be like, you know, one quote for building that, you know, gets updated over time. You know, if we send detect there today, find five deficiencies, that becomes one quote, you know, if we send them back in a week from now or whatever maybe find some other two deficiencies, it just gets added to the quote. So... how are customers like not getting drowned in deficiencies and really making this useful? Because the thing that, you know, you were showing a minute ago where once it's fixed, you still manually have to go back and mark those deficiencies fixed, right? So it's not that this whole process is, you know, 100 percent automated and we can very easily still get kinda caught up at that level... you.

--- Customer engagement ---

BRETT

18:51 Yes. Okay. So I understand what you're saying. It's interesting that you guys aren't focused on the deficiencies, but then again, you say, hey, I go to a building. I'm finding deficiencies every time I go. So that makes sense with our customers in today's world. The deficiencies for them is a gold mine.

--- Quoting ---

BRETT

19:09 You guys told me last week, a goal for you all is to increase your close rate. So how our customers would do that via service trade is log as many deficiencies as you can and send a quote out for every single one. We don't expect you to get every single one of those approved, but it's kinda like sales. It's a numbers game. The more



quotes you send out from deficiencies found that's how you guys are going to increase your close rate, long term that said go ahead.

SIMON

19:35 Right. And just to play devil's advocate, we agree with that. But again, let's say somebody goes building, find five deficiencies, right? TAM, that could just go into a quote and the quote is going to have the five efficiencies and a price to fix those five deficiencies. Right? So, what I'm really trying to get at is like from an administrative point of view, right? You know, what are the cost benefits of like having this whole new category called deficiencies, which again is intuitively makes sense and everything like that. But if all those are going to get into a quote anyway, it's not like if there are five deficiencies, we're gonna do a quote for one of them, right? Or we shouldn't be doing that. If there are five deficiencies we should be doing, you know, five on a quote and I, you know, if a customer wants to do three, fine, but at least we gave them a quote for five, right?

--- Deficiencies ---

SIMON

20:27 So again, this is, you know, seems very intuitive and helpful. But it could, we could also be drowning and managing deficiencies especially if it doesn't automatically close them out.

BRETT

20:41 So, let me ask you now in today's world because you guys don't technically log deficiencies under that name, the technicians are just writing what happens in the notes and you guys are transferring that to a quote?

SIMON

20:56 Basically, yeah.

BRETT

20:58 So at the end of the day, there's no way to get rid of deficiencies in servers trade. It's a pretty integral part of the system and it's in your guys world exactly that instead of logging notes, log a deficiency. So someone from the office can automatically and quickly turn that into a quote. I think that's the biggest benefit for you guys. It's not having to transcribe from the notes to the quote, being able to just click a button and say, this is what I wanna quote.

STEVEN

21:25 Yeah. I think the real difference about it is that each deficiency essentially is its own unique thing that's not tied to one master quote, right? Like what would be ideal for us is like let's say you find five deficiencies in a given visit and fine, let's say we log each of them as their own individual deficiency. Ideally, we should be able to loop them all into the same quote automatically where it's like created quote.

--- Deficiencies ends ---

STEVEN

21:59 And then like you can select like five different deficiencies. And then from there, when the quote changes, whatever stages it's at it'll add. So, is that, can we do that?

BRETT

22:17 Yeah, it's a little different than some of my customers do it, but I do have customers that do it this way as well. So, all I did right here on your screen is I just made a quote. There is absolutely nothing on it right now. I wanna make this easier for your guys workflow. I'm gonna go add an existing, see what's going on. Flip this off real quick.

BRETT

22:44 Why is that not working for me? Let me close some tabs.

JOSEPH

22:58 Live demos, all we suck this.

STEVEN

23:01 What's that you live?

JOSEPH

23:02 Demos always are hard.

BRETT

23:04 I tried to turn my camera off. It's not rocking for me.

STEVEN

23:07 Do you have existing efficiency?

BRETT

23:13 You might be right? Let me tell you what? Let me do this. I think you're 100 percent, right?

BRETT

23:32 Well, Steve, you need a job and come work in service.

STEVEN

23:37 What are you guys paying?

BRETT

23:40 Probably not what you get paid on.

STEVEN

23:42 Yeah, I...

BRETT

23:45 Maybe next time, cool. So, thank you for pointing that out for me, but that's exactly what it was. So I didn't have any deficiencies on your location.

--- *Quote templates* ---

BRETT

23:54 But right here, I would go select multiple deficiencies, and that's why we're logging those deficiencies so you can come in here and say, I'm gonna grab these. You know, we were along with five before. I'm gonna grab all five of these and save them at that. All five of those got attach the quote you guys put in your quote description, your parts, labor items, material and then you send it to.

--- *Quoting* ---

JOSEPH

24:18 Got it.

BRETT

24:19 That reduces the, I need to quote for every single deficiency.

STEVEN

24:25 Right. And then now, when this quote changes status, it'll change it for all five of those deficiencies, right?

BRETT

24:34 Is correct, anything tied to the quote will get changed, okay?

BRETT

24:43 Did you wanna see this in quote format or is that good?

--- *Quote templates* ---

STEVEN

24:47 Yeah. Let's go through the quote one more time. I wanna see how it goes from an efficiency to a quote with the pricing and everything like that.

BRETT

24:55 So, I'm just gonna throw some... random parts on here.

KURT

25:00 And the only thing I would add to Simon's point... this is the future is data and minding it for it's useful purpose whether you call it a deficiency or pull through a work.

*--- Quote templates ends ---*

KURT

25:14 We don't care. It's just the term that we've landed on. But the reality is the data is there, it's separated, right? It's not part of a note within a work order or a job. It's the deficiency as we talked about during the first call, right?

BRETT

25:29 Oval rates.

KURT

25:30 Are somewhat static.

*--- Customer engagement ---*

KURT

25:31 So it's more about how many times a bat do you get? But it's part of our model and it's something that enables and helps our clients grow their revenue. However specifically you wanna use it, it's there for you to... leverage that.

JOSEPH

25:52 Is it fair to say the value of deficiencies and itemizing by equipment increases in value?

*--- Assets ---*

JOSEPH

25:59 The more complex or the more piece of equipment a building has... you know, maybe a heating side of cooling, side pump, side the side, you know, whereas a simple building that only has one piece of equipment, does the value from your perspective of looking at service that way to, you know, go down what's how do you view the application of that idea?

BRETT

26:24 I think that's a really good point. I would say there's definitely more value to it. The more complex the work you're doing is, if you need to track parent assets and child assets and deficiencies on which component of the device is occurring on, there's a lot more value than there's just one boiler at this place. And I know what I'm doing to it and there's no sub components that you guys work on.

--- Assets ends ---

STEVEN

26:48 Okay. So.

BRETT

26:52 So, this is what that quote looks like. I actually messed up the ordering of it. But typically you would have these deficiencies above the line items right here, but you guys can set it up however you guys want to set it up. So Dual fuel at the top here's, how you guys break it down.

--- Customer engagement ---

BRETT

27:10 And here's those five deficiencies. So the grand total is 1,625. You're showing the story to the customer, the pictures you took from those deficiencies, hey, here's, all the problems. I actually found. This is Dual fuel teases, and then the customer, when they come in, they can either approve all five or they can say, hey, I only want one two and four done... and that would notify you guys in the office that they only want three out of five done.

--- Pricing ---

BRETT

27:40 Does that make sense?

SIMON

27:43 Well... but the pricing is, isn't broken out by deficiency.

BRETT

27:51 Yeah. Let me go back to that... like we.

STEVEN

27:57 Yeah, that doesn't matter that happen.

JOSEPH

28:03 It doesn't matter. Shouldn't, the customer know, like how do they know they're gonna prove three or four or five Steve?

STEVEN

28:08 No, we're not gonna break our pricing. We're gonna give them one long, some price. And then if they say we don't wanna do three or five or if they ask us for breakdown, we'll do it. But off the bat, we don't want to be break, it causes a lot more questions and issues.

--- Pricing ends ---

BRETT

28:26 I agree with that. I would say 99 percent of my customers are doing bulk sums. Yeah, for that reason. And so if I went... or what do you guys want me to do with this? Do you have a specific question?

STEVEN

28:47 I'm good on this. I mean, if we wanted to, we don't even need to show widget double time. We don't need to show any of that, right? We can just show the.

--- Quote templates ---

BRETT

28:57 Yeah, it's what you guys show on the quote as far as items or prices is totally up to. You can do just a grand total. Only you could do line at grand total. You can do TAM line out of prices whatever you guys want.

STEVEN

29:09 So, like on the back end, we obviously wanna actually price it out. So we have all of our budgets, but on the front end, we could just be like only show service total and description, no quantity unit price, no total.

BRETT

29:23 Exactly. And on the back end, yeah, you guys are going to have all the information you need. I go back to that quote. I got all my prices in here. This is the demo. So I didn't actually put individual prices in for these. You guys. Would you'd have all your margins customers? Of course, never gonna see that.

STEVEN

29:37 Right. Okay.

BRETT

29:44 Okay. So that's deficiencies and quotes. I'm just looking over my notes seeing if there's anything we missed on this topic.

--- Purchase decision ---

BRETT

29:53 I think one of the biggest things to point out is another thing that I just noticed from our last meeting is you guys have workflows set in stone from M help desk. And that's great. The workflows that Simon sent me last week before our meeting. Your workflows are gonna change a little bit depending which software you guys go with.

--- Implementation and ongoing support ---

BRETT

30:08 And that's a big part of what the implement excuse me, implementation process is it's yeah, we got to train you. We got to teach you guys how to use this, but it's let's figure out how service trade is going to work for you guys specifically and your guys workflow?

*--- Recurring maintenance ---*

STEVEN

30:23 Right.

BRETT

30:25 Okay. Let me... yeah, that was everything I had regarding deficiencies and quotes. The next topic that I had here was services reporting. For example... Steve, last week, you gave me the example of say we do start doing a new service line backflow for example. And I wanna see all the services of backflow that I offer for all my customers.

*--- Recurring maintenance ends ---*

BRETT

30:53 How I would do that and what I was blanking on last week, I would come in and run a job report. So I'm actually gonna reset that. When I run a job report for everything and do jobs and services. That's gonna tell me if there's no job, no worries. It's gonna tell me every service that I have for a customer.

*--- Forms ---*

BRETT

31:16 We'll let that download and open. If it was backflow specifically. If I wanted to get a little more granular for you, I would come in here and do just a backflow report... search it... and then export it. And there's a lot of information in here. So this might take a second.

*--- Recurring maintenance ---*

STEVEN

31:37 This is only showing me jobs.

BRETT

31:40 Job and... services.

JOSEPH

31:45 Job services.

STEVEN

31:49 And the services that are gonna be set up before the job?

BRETT

31:54 Exactly 100 percent of the time, yes.

STEVEN

31:56 So, if there's a service contract, each one of the individual components of that service contract will be serves, that is correct. So.

--- Accounting ---

BRETT

32:06 This is the export that comes up... and it's here's. Those are the codes we use.

BRETT

32:20 You got your text and you got your service description right here.

BRETT

32:31 Yeah. So this, yeah, very high level reporting throws it all into excel kind of along this line, there was one other thing you asked me... and it was that's the thing I missed around quotes.

--- Quoting ---

BRETT

32:46 Can you see what's been sent out? Approved? Acted on all that can be reported on in this format as well. You asked the question last week, as far as close rate, we showed you our enterprise reporting through Amazon quick site... native reporting can always be done inside of service trade.

--- Accounting integrations ---

BRETT

33:04 You can find that you might have to do a little bit of manipulation inside of your excel. If you do it through core service trade, if you purchase the enterprise level that Kurt showed you last week, you tell us the KPI'S you want to report on.

--- Accounting integrations ends ---

BRETT

33:16 We'll build it for you guys. So it's how manual do you guys want to be with? This? Essentially is the question?



STEVEN

33:22 All right. Not very much.

BRETT

33:28 That's kinda what I was thinking and thinking about it over the weekend when I was listening to this and it's like the end of the day, you guys with your workflows, you're an enterprise customer. There's really no way around that. With the level of delivery, you get to your customers. That's how I see it as we get into pricing and all that good stuff. You guys tell me what you want to start with, but I think you guys are definitely an enterprise customer.

STEVEN

33:50 Right.

BRETT

33:51 Yeah.

JOSEPH

33:55 Let's see.

BRETT

33:57 What other questions about services do you have? Because that was really the main one?

STEVEN

34:13 Yeah. I mean, my main question is, you know, we're on that reporting... and it seems like, you know, is not such a complicated fact being able to see the proposal and stuff. It's very important.

STEVEN

34:36 I guess... could we talk about pricing a little bit, Simon? Have you gone over the pricing at all or no?

SIMON

34:48 I think our initial conversation gave us some pricing but let's go through it.

JOSEPH

34:54 Yeah. And Simon, you already discussed apis with them on the last call.

KURT

35:03 The...

STEVEN

35:03 The a PI can.

BRETT

35:07 Briefly discussed it. What specifically you looking for? Joe?

JOSEPH

35:11 We have an IO T side of the business where we control monitor equipment. We tag in a format called haystack. So you talked about parent, you talked about child assets. So, haystack is a meta data tagging standard. I don't think next year we would be connecting our service platform to our iot platform. However I do imagine the next platform we choose, we're going to be on that platform for five years, 10 years. So if it's going to be service trade. I wanna make sure that when we want to link our equipment performance history to the equipment in service trade, we could do that.

BRETT

35:56 Yep. So we have a full open API. What I just searched on my screen is service trade API here's, our entire documentation.

*--- Purchase decision ---*

BRETT

36:04 So if there's something you guys wanna build or you want us to help you with building kinda take a dive through this first and let us know further and we can definitely help out with that or if you guys wanna do it internally with your it department, feel free.

*--- Type of work ---*

JOSEPH

36:15 Okay. That's awesome. Thank you.

BRETT

36:19 Absolutely. We're a big proponent or big fan of, I know service trade is not going to handle every single part of your business. It's gonna manage service and small projects really well, but we want it to be able to connect with any other best of breed software you guys pick in other departments.

*--- Implementation and ongoing support ---*

BRETT

36:34 Is that kind of how we see it? Yep? Absolutely. So how I said earlier, you guys are an enterprise customer. The biggest reason I say that is as far as the BI or business analytic reporting that Kurt did show you guys last week through quick site to Kurt point last week, you guys might not start the first year with that because you are gonna spend the first year building out some of this data.

BRETT

36:57 So it might be your premium customer for a year, and then you renew at enterprise, we got to figure that out. It depends what you guys wanna do. Everything you guys have seen this far is on both, everything is on the enterprise level, everything minus the reporting through quick site is on the premium level. You guys are not going to be on select. You need to be on premium for the... intact integration is native and we would base this on the amount of technicians that you guys are running. And this is a monthly fee per technician and we Bill it annually. So, do you guys want me to price out enterprise or premium?

STEVEN

37:32 Enterprise?

BRETT

37:36 189? It's 12 tech, right?

STEVEN

37:40 Well, I mean we could do that.

JOSEPH

37:42 Is it only technician?

STEVEN

37:43 Maybe?

JOSEPH

37:44 Office staff? Like how do?

BRETT

37:46 All your office staff is going to be free. So just technicians for I.

JOSEPH

37:52 Okay. So.

STEVEN

37:53 189 a month. Yeah. And what's your typical historical price increases?

BRETT

38:03 So, price increases. I've been here for four years. There's been one price increase. It was... last either last Q2 or the last Q3. It went up 10 dollars per tier that you're looking at right here written into our contracts, we'll say something that if our

price were to increase year over year, we can increase you guys no more than seven percent until you reach list price.

JOSEPH

38:28 Which is.

BRETT

38:30 This is what's priced on your screen?

JOSEPH

38:31 Got it.

STEVEN

38:34 Does that?

SIMON

38:35 Mean.

BRETT

38:39 One person?

SIMON

38:40 Mean, whatever this, if you raise it to 250 dollars tomorrow, you're saying that we'll start at 189, but we can only go up seven percent per year until we hit to 250.

BRETT

38:52 That nailed it on the head that said, I don't really see that kind of increase happening being that I've been here four years and we increased at one time and that was to deal with inflation.

--- Purchase decision ---

JOSEPH

39:09 Companies typically asked that we have not asked yet. You're...

BRETT

39:14 Friends over here asked that same question kinda last week as well. And I was thinking about that. You guys have asked a lot of good questions. One of the things we're gonna get to in a little bit is onboarding that's typically a big question that comes up from your guys end, which I'll cover in detail other than that like functionality guys or functionality wise. You guys are asking all the right questions. I think one of the other things you will have questions about is the impact integration, but we need to meet with our accounting experts to figure that out. That is definitely not my wheelhouse.

BRETT

39:47 I do wanna, I don't want there to be any surprises for you guys.

--- *Parts management (inventory)* ---

BRETT

39:50 So we talked a little bit about, hey, where do you wanna keep inventory in parts? Steve? You said on the service side, it makes sense to have it in service trade. We have another module. It's called partsledger. It's our inventory and processing tool. There is a price behind that. Partsledger is 6,000 dollars a year, that includes 10 warehouses. So 10 trucks or 10 physical warehouses. There's a setup fee for that, and there's a setup fee for service trade. The impact integration would be free. So it would really just be service trade and partsledger licenses. Obviously, we have to look at partsledger.

--- *Pricing* ---

STEVEN

40:26 What's the setup for search?

JOSEPH

40:27 True.

BRETT

40:29 Depends on the amount of text that we're rocking. So, are we say in 12?

STEVEN

40:32 Yeah, we...

BRETT

40:35 50 attacks. So 42 or that's premium, what's the enterprise setup?

STEVEN

40:42 Whatever it's not that much.

KURT

40:44 It's not typically, I think back of the envelope. It's 350 protect. So.

JOSEPH

40:48 You're...

STEVEN

40:49 Talking about a couple of 1,000, you're not talking about.

BRETT

40:52 It's not 50 grand. Yeah.

STEVEN

40:55 That's a.

BRETT

40:56 Problem?

BRETT

41:00 So, I can, you know, I can talk through numbers with you guys right now. I can put it in a quote for you guys. You tell me what you think is best.

--- Pricing ends ---

STEVEN

41:11 It doesn't matter either way.

BRETT

41:14 Okay. I'll put together a quote. So you have everything in writing. I'm gonna rocket off the 12 text. Do you want me to include part pricing in there even though we haven't reviewed it yet.

STEVEN

41:24 Yeah, just put everything.

BRETT

41:27 Okay.

BRETT

41:32 Okay. That'll be the first thing I do after our meeting today... what?

--- Assets ---

JOSEPH

41:37 I got a question. One of the, how do you guys handle pictures? Are they only tagged to calls or can I pull up a parent account and see all pictures associated with any call at that account level? Like one of my frustrations with them helped us right now, if I wanna look at some pictures, I got to find the site, find the parent, find the child, find the service, call, open the ticket.

--- Assets ends ---

JOSEPH

42:05 And then I can see pictures. Is there a way that in your platform, you could see any picture related to a site without going into the call itself? Do you understand what I'm asking you, right?

BRETT

42:18 Know exactly what you're asking me. I don't think there's a way to do it though. I think you're going to run the same issue that you're running into. M, help as far as I gotta go to the specific work order and it houses those pictures for that.

JOSEPH

42:29 Okay.

BRETT

42:30 The only way I had another situation like this with another company. I was working with what they did or what they're in the process of doing is they didn't have their pictures in service trade. They just use Dropbox, and then they had a link to the drop.

JOSEPH

42:45 Drive. Yeah. Yeah.

BRETT

42:47 If you add a link to Google drive and all your pictures were in there, you could put it under comment under location that would direct you there. But that kinda limits your technicians in the field from viewing those pictures as well.

JOSEPH

42:56 Yeah. Okay. Thank you.

--- Access to information ---

BRETT

43:00 Absolutely. What other questions guys?

BRETT

43:10 I'm...

JOSEPH

43:10 Good for now? What about mobile? Do you guys sleep your app when it's not being used? And one of our frustrations with our technicians is the apps they put on their phones, trains, or batteries? Any feedback on that?

BRETT

43:28 I don't think when you say sleep your app, do you mean like does it turn off after a set amount of time?

--- Access to information ends ---

JOSEPH

43:35 Yeah. I mean, like when I, when we enable them help desk on their phones, you know, their batteries would go twice as fast as if, you know, we just, they would sign in and then close out the app or whatever it was. So.

BRETT

43:49 Gotcha. These are small.

JOSEPH

43:51 These are not big things.

BRETT

43:53 No, that's fair. But I'll be honest like I use this iPad every day. It's on my desk and it's got service trade running all day every day. I started at 100 percent every day typical end of day. It's sitting around like 55 percent. So it's not drain in my battery and this iPad like 10 years old.

--- Tech time tracking ---

BRETT

44:07 So it's not totally killing it. But I'm thinking of an article that we have it's like system requirements and something about devices that I can send you Joe and it kinda gives you best practices on that.

KURT

44:19 The, the best answer is that we don't we only Geo locate when your tech clock in and clock out of events specifically.

--- Tech time tracking ends ---

KURT

44:27 Because if it were to track your text through the day, right? It would be up and it would be draining your battery all day long. So I think the answer is no, it's not going to drain the battery. Like Brett said... I also have server trade and I keep it. I don't if I clock out of a job, it's no big deal. It's not draining my battery. And that's specifically why we do it. Those apps that track your text, drain batteries. We don't track text.

STEVEN

44:55 Okay. Thank you. Bye.



BRETT

45:03 What I'm thinking guys is another thing on our to do list is for me to show you guys the service time card, Simon. That has a lot to do with payroll that you were asking about last week. It'll take me five to seven minutes.

STEVEN

45:13 So.

KURT

45:14 And, and by the way, the only thing I will say is what have you guys asked that our other customers asked? What you're in the process of doing onboarding, accounting is probably the most important, right? So when people make a decision that you're at a lot of times, they wanna do it all at once and they try to consume both accounting and the field service at the same time you have solved that problem by going forward with impact already. So that would be the answer I would have to your question. What do you typically ask that other clients have? And I think the way that you're proceeding is in my opinion, we would always say server should go first but, you know, in this case, obviously it's a moot point. But... I think you've already solved for the most difficult challenge.

*--- Accounting integrations ---*

JOSEPH

46:09 Credit to Simon who works on.

SIMON

46:12 Thanks, Kurt. Just out of curiosity, what accounting systems are your customers or people like us who are implementing, you know, potentially service trade, you know, doing obviously your native is Sage in tax. I'm sure percentage are doing Sage intact, but, you know, what's your feel for what accounting solutions people are going?

KURT

46:40 I would say we have a ton of customers on 300 that are upgrading to Sage because they just like the feel of the Sage product. And intact is an easy upgrade for them. Alternatively... what would be the most, the second most popular? I mean, we've got a lot of Quickbooks, but those are smaller that are growing.

*--- Accounting integrations ends ---*

BRETT

47:09 I've seen a lot of NetSuite recently, big companies on NetSuite.

KURT

47:16 Yes. And I think was NetSuite that just bought... the integrator.

BRETT

47:27 Now that was spectrum.

KURT

47:29 Spectrum spectrum is probably... second or third, most, right? So, what the large erps are finding is that they can't software. Once you get nuanced, once you want best in class verticals, you have to break away from the all in one. And so spectrum is one that's saying, listen, we're not gonna win the battle versus service trade and they bought rivot, which is the solution that built the apis around spectrum. So spectrum would be another one that, you know, these large huge, right? They have 100,000,000 dollar Construction... pieces of the business that went with the on one ERP, that are now saying, you know, service is just as important. We're not gonna win that game. We bought rivot, spectrum did bought rivot so that they can have that integration piece. So that's what I would say.

SIMON

48:30 Right.

--- Accounting ---

SIMON

48:30 So if you have to break it down, you know, in the last year or so between customers going with Sage intact, maybe Sage, 300 Quickbooks, NetSuite spectrum. How does it break down?

KURT

48:49 I would only say for the northeast, I would say that the line share are going with intact. I can't speak for other geographics in the.

--- Accounting ends ---

BRETT

48:58 Country, I think a little context on that. Kurt works with really big companies. I work with companies about your guys size. And then there's people lower than us that work with smaller companies. What I've been seeing a lot of is people already have stage in place. They have Sage 300 in place and they are making that jump to intact just because it makes so much sense for what they're trying to do that's the biggest thing for our territory.

--- Tech time tracking ---

SIMON

49:21 Okay. All right. Let's go back to the on screen.

BRETT

49:26 Okay. So this is our service time card. Essentially, it's an approval process for technicians to go through to make sure they're getting paid the correct amount for payroll. So essentially at the end of the week technician can come in here and submit their time card. Let me go find my name there. And there's two ways we can track time guys. It can be labor items or it can be clock events. Do you know which specific one you would prefer to use? Clock events are the physically clocking in, clocking out labor items. Are the, hey Brett boiler labor one hour? He was here for quantity eight. Does that make sense?

SIMON

50:04 Yeah, I think we want just employees clocking and clocking out.

BRETT

50:09 So you guys can pick and choose what this is based off of. So I already have clock events in here. From today. You can see I've got your location in there. So essentially all my clock events automatically funnel into this time card. They're all tied back to the individual job. So you guys in the office, when you're reviewing this can go double check to make sure that information is correct. You can also have additional lines here. For example, I have pto, sick time training. If I, as the technician say, hey, I was on pto for two hours today. When I go to submit my time card, I can say maybe I had an additional comment. My pto was preapproved, whatever it is. So I certified to be true. I submitted my time card. Then goes to my manager. In this case, I can see everything. I'm an admin on the account. So I'm gonna actually go view this time card. And as the manager, I'm coming in, I'm cross checking making sure everything matches up if I see that, hey, Brett requested this pto, but he didn't get it approved. I might come in and request a change.

JOSEPH

51:14 More.

BRETT

51:15 When the manager does that, the technician gets an email... here's. What it looks like. It says. Hey, you got changes requested. So the technician comes in reviews, that time card can make any changes that they need. So take that pto out. I'm gonna say yep this is true, we submit it... back into that process as far as approving it and we go to review.

--- Accounting ---

BRETT

51:40 Excuse me. So when I view it, I make sure it's good. I'm simply going to approve it down here. And this is where I'm actually going to export this information for adp. So we will set up the template based on what adp requires. When you import stuff in. We actually already have an adp template set up in another one of our accounts. So we can probably help you there. Essentially, we'll export it into this format and you will take that spreadsheet and just import it into adp. It's a little less manual than native time reporting and ServiceTrade.

--- Type of work ---

BRETT

52:19 That makes sense.

STEVEN

52:22 Yeah.

SIMON

52:28 So here's the thing we talked about having, you know, 12 technicians on the server side, we probably have about 30 people in the field overall. You know, the other portion, the other half of our, in our Installation business... we would want to have one time solution for the entire company.

--- Pricing ---

BRETT

52:56 Okay.

SIMON

52:57 So we would essentially be paying 180, you know, if the installations people need to have a time keeping solution, but don't necessarily need the rest of the service trade. Are we paying 185 a month for them too?

BRETT

53:13 No, is the only thing that you need for those install guys to track?

SIMON

53:22 Yeah. Out of all we've seen, I mean their project management would be done in a different software, not this.

BRETT

53:30 Okay. So you would say 15 of your 30 field guys are installed... or 18, whatever. I just looked up the price. We have a concept of a helper license can be that of a helper apprentice, but it could also be anyone that needs to track time in the field, those licenses, no, they're not 189 a year. They're seven or eight for the year which comes out to, I think it's 59 dollars a.

--- Tech time tracking ---

SIMON

53:55 Okay. Do you put that?

STEVEN

53:58 How expensive is that compared to a current time?

BRETT

54:03 Say that again, Steve?

STEVEN

54:05 I'm just curious what we currently pay for timekeeping?

SIMON

54:10 Currently, it's to... I have to get back to you on that.

STEVEN

54:18 Got it.

BRETT

54:24 So, yeah, I think the point there is if your helper text or if you're installed guys can use service trading and get some benefit out of it, makes sense to buy him a tech license. If it's just time tracking, there's probably cheaper options out there.

SIMON

54:42 Okay.

BRETT

54:44 You...

SIMON

54:45 That include that in the quote that you send over?

BRETT

54:49 Yeah, I'm gonna do 15 service guys and 15 helpers that cool.

SIMON

54:52 Sure.

BRETT

54:53 Okay.

BRETT

54:58 All right. Just a few other things on time card. Do you guys have kind of full autonomy of what you want this thing to do? So any additional rows you guys pick your own rows, put them in, you pick the calendar start date you can pick? Are we billing for job prep? Are we billing for end route, whatever you guys want to track? What else template settings? So we'll essentially set up the template. Like I was

saying to whatever adp importable format is, that is what will make the template inside of service time card.

SIMON

55:33 Okay.

BRETT

55:36 Then, like I said, if you guys don't want to use job items, you would just keep this on for clock events. And then these are just other settings. So you got, you add a new user in service trade. Let's just refresh it over to time card and we got some Quickbooks information down below, which isn't important to you guys. But that's pretty much time card. It's a really simple tool. It just makes the process of time approval easier.

*--- Purchase decision ---*

BRETT

56:01 But like, you know, the question is, does this make sense for my installers? Or should we look at something else?

BRETT

56:09 Okay. The next thing I had on the agenda for today guys is I wanna go kind of into detail with what implementation looks like. And I think, you know, talking about price kind of flows right into that unless you guys want to go a different direction.

*--- Purchase decision ends ---*

JOSEPH

56:25 I'm okay.

STEVEN

56:26 Yeah. Let's do that. Okay?

BRETT

56:40 All right. So this is really what the onboarding process is gonna look like. As we're going to go through this. We're going to go back and forth. We're going to have a couple of different meetings. Let's figure out of service that is gonna work for you guys. If we come to that conclusion, it's going to happen is Kurt and I are going to send you over a contract.

*--- Implementation and ongoing support ---*

BRETT

56:54 You guys are gonna sign it. Once we get that signed contract back, we're going to assign you to a project manager on our implementation team that's going to be your go to person for your entire onboarding process. So we do have the concept of a service delivery window. Essentially what that means is that the earliest we can get started implementing your guys account earliest start date have available as of right now is 315 March fifteenth. You guys are going to have 120 day onboarding window. So four months. So within two weeks of that service delivery start date, you guys are going to have a... kickoff call is really important. It's where we're gonna schedule a time for weekly calls because we're gonna need to meet with you guys weekly during onboarding, to make sure you're giving us everything we're getting you everything you need. We're gonna review your timeline. Like I said, you got 120 days from us. If you want to get started sooner, tell us we can move as fast as you guys can move. A... project manager is gonna learn more about your business, but they're going to have all my notes. So they're going to be a little bit ahead of the game. Let's establish measures for success and really plan a time for those certifications. You guys have 30 guys in the field and a bunch of people in the office. You need to learn how to use. This. That's a big part of onboarding also discussing those workflows. What are we going to put in place to be successful moving forward at the end of the day? This kickoff call is really about discussing your data. That data might be an M help today. It might be in Quickbooks today. The data we're essentially gonna ask for is this stuff. So we need your customers in your locations, services, whether they're recurring or one time items and prices, your equipment, and then PDF forms. Those are where we take your guys forms for like PM checklist in the field. From there, that certification does come into play. So certifications are pretty easy. Every single person in the company is going to get their own certification program. It's online it's self paced, there's a test at the end. The test at the end, let's my project manager know where you guys are tracking, where you guys are struggling. There's areas that you guys are struggling in. You're going to have two and a sessions back and forth until it makes sense for you all. Also, we do have the addition of onsite go live support. Essentially, what that means is two people from my customer success team will fly up to do fields office and they'll stay with you guys for the two days you're going live. So the day before and the day of they're essentially Google of service trade for you guys. I think that's 3,600 bucks for two days.

--- Accounting ---

BRETT

59:15 From there, it is a matter of setting up service trade tying into intact. What do we need to do to map it over? This is also going to require some meetings on the front end meeting with our accounting expert as well as your Sage partner, figure out what do we need to map before we sign the contract... next step, data import, review and approval.

--- Implementation and ongoing support ---

BRETT

59:35 So of all that data that you guys are going to send us for your service trade account, we're going to review it. If there's any errors. If there's any duplication. We're gonna say, hey, this is wrong. Fix it once you guys fix it and send it back to us. Then at that point, we'll put it into service trade. But as you guys know, good data in good data out, we want it to be clean from the start. And last step there is going live

with service trade, definitely time to celebrate, but you guys will have ongoing support with that in two ways.

*--- Implementation and ongoing support ends ---*

BRETT

1:00:01 So you're paying for support, you can call us, email us, chat us on the website at any given time. Our support team is pretty world class. They presented at last QPR for us and said average response time to a ticket is about seven minutes. Average time to ticket closure is about 25 minutes. I don't know how much fast software you guys deal with in today as well. That's pretty good.

*--- Accounting integrations ---*

STEVEN

1:00:23 What do you guys use for your chicken in system.

BRETT

1:00:26 Zendesk?

STEVEN

1:00:29 Yeah. And it works well.

BRETT

1:00:32 Does work well, move that?

JOSEPH

1:00:37 We had Zendesk in cedwick avenue. No one use it. I'm happy to do it again.

STEVEN

1:00:43 Sounds like wire tickets. Don't be close.

JOSEPH

1:00:48 Yeah. I mean, ideally we should just use this for our ticketing system.

*--- Accounting integrations ends ---*

STEVEN

1:00:54 All see, not even using ServiceTrade for their ticket is.

JOSEPH

1:01:01 Yeah, I can, I ask you a question? Why did you guys choose to make the financial cost of the product based upon technicians and not based upon users? I'm



sure rational for that. Why did you just, why did you guys choose that?

--- Paper process ---

BRETT

1:01:15 Great question. At the end of the day. I see it as your tech, your service technicians in the field. They're the ones that return the ranch is making you guys money in the field. So that's how I'm gonna charge you.

JOSEPH

1:01:26 Yeah, but to Steve's point, right? So we have a help desk upstairs, right? For our IOT division, right? So, right calls come in. I mean, she's not a technician. She's not going on turning wrenches, but she's done with inbound requests, you know, sometimes generate proposals sometimes not. So that's why I was asking just curious.

BRETT

1:01:43 To take that a little further, if she's just dealing with inbound requests, is it like service calls that stuff or is it like you said monitoring with iot? So you need to like figure something out in your office?

JOSEPH

1:01:55 Yeah. Sometimes customers are saying, hey, listen, my control panel is not working, you know, and sometimes just rebooting the modem and you're off and away. And then sometimes you got to send a technician and assign a call. And right? So not in mechanical, every issue needs a visit.

--- Paper process ends ---

JOSEPH

1:02:11 We're not every 90 percent, 99 percent in the technology side, maybe 50 percent of the time. You could solve it remotely.

BRETT

1:02:22 I...

JOSEPH

1:02:23 Need to dispatch.

STEVEN

1:02:24 This is curiosity question.

JOSEPH

1:02:27 Yeah, don't. Yeah, don't please. I don't mean to take us off topic, sorry.

BRETT

1:02:34 Okay. I can.

JOSEPH

1:02:36 Steve, you brought it up?

BRETT

1:02:42 Just thinking off top of my head for that one. If that girls in the office taking calls left and right? Why not have her as an admin user on service trade one? You don't have to pay for her, but if she's making proposals, she can do that through service trade. If she's dispatching a text, she can send that tech through service trade. That's the first thing that comes to mind for.

STEVEN

1:02:57 Yeah, she wouldn't I think he wants you to charge us more should be charged as.

BRETT

1:03:07 Yeah. Look at that and call my boss. Hey, this is what we need or I won't get done, I think show approve.

*--- Implementation and ongoing support ---*

JOSEPH

1:03:12 Yeah, yeah.

BRETT

1:03:15 But guys, I do just want to let you know also with your account, you will be given an account manager that account manager's main job is to make sure that you guys are getting the most value out of service trade are using it the correct way. Is there better things you could be doing? They see all your information, not your information, but they see your functionality information on the back end. As far as account health. They wanna make sure you're getting the most value out of service trade, if it is time to upgrade or renew or you need something additional, you just need help, call that account manager. They're going to be your best friend during this process?

*--- Pricing ---*

STEVEN

1:03:46 So, couple of questions grow. What happens if it takes longer than 100, 20 days?

BRETT

1:03:52 On our end or you're in?

STEVEN

1:03:55 On our end?

BRETT

1:03:58 So at that point, if it takes longer than 120 days, you got two options on the quote that I'm going to provide to you.

*--- Implementation and ongoing support ---*

BRETT

1:04:03 There's going to be a service delivery extension written into it. It's going to be 30 percent of your account setup. You guys can pay that fee for an additional month or you can go live by yourself.

STEVEN

1:04:14 Okay. Once we go live, what kind of support do we get exactly?

BRETT

1:04:23 Well, get 24 seven support. It's that call us, email us, chat on the website, and you also have your account manager here. So you got two points of contact at any given point or any given time?

STEVEN

1:04:33 And is there any requests that is outside of the scope of the support?

*--- Implementation and ongoing support ends ---*

STEVEN

1:04:39 Meaning we want to come up with the custom report to do this, will you guys like log in for us, make the report for us? And now we're in.

BRETT

1:04:51 I will let you on this one. How's that work with like that sounds like a TAM?

KURT

1:04:58 I believe it is that if there is additional work that's specific to your workflow?

*--- Implementation and ongoing support ---*

KURT

1:05:04 TAM is a technical account manager that... can be purchased for a slightly additional cost that can work on that for your behalf.

STEVEN

1:05:15 So, does that mean like any custom report is additional?

BRETT

1:05:24 A customer report would typically be through quick site. What you saw that we were talking about?

STEVEN

1:05:29 I guess, I mean, it could be anything, right? I'm just thinking like there's going to be a 1,000,000, you know, parts of this. Some of our questions are going to be like just show us how this works.

SIMON

1:05:41 I imagine.

STEVEN

1:05:42 It's just gonna be free ongoing support. And then we might have questions like, hey, we want to figure out how to take this data and, you know, put it into XYZ format and you guys might say TAM alert TAM alert. So, I'm just trying to get a sense of like what's included, what's not included in whatever is not included? What are the cost of it?

BRETT

1:06:08 Gotcha. So if it's a matter of, you know, yeah, wanting to build out a specific KPI report in, through Amazon quick site, what you saw last week that's billable hours by TAM technical account manager. But if it's my text in the field or I'm in the office and I can't figure something out, call us included.

STEVEN

1:06:27 Okay. How much do you guys build the technical account managers?

BRETT

1:06:34 I can find out right now.

--- Pricing ---

BRETT

1:06:44 Technical account manager... her, these prices in Salesforce. What are they? What are they for? Are they for a year for an hour or a set of hours?

KURT

1:06:55 Is it one sec? I think it's 175 an hour, but it's off the top of my head and I believe at enterprise don't, you get five hours included?

BRETT

1:07:05 You do on the enterprise level, you guys do get five hours included in your setup that's really set up quick site for you guys based on the KPI'S you want. I don't have accurate information here in Salesforce. So let me double check on the actual price, whether it's 175 or 199 an hour.

--- Pricing ends ---

BRETT

1:07:23 Not 100 percent sure. But what I can do is I'll include a couple of hours in the quote for you just.

STEVEN

1:07:28 All right. That's also, Brad, can you, how do we access the recordings? I do want to rewatch, you know, especially the first one.

BRETT

1:07:42 So, Steve, I know I sent you this, I don't think I introduced this to you. This workspace that we've been using... this is called recaps and I actually didn't put the recording in but I will after our meeting here.

STEVEN

1:07:53 Yeah, because I was in there and I clicked, but it brought me to like.

BRETT

1:07:59 Yeah. Now that's my bad. I didn't put the recording and so I'll drop a link to it right here. You'll see last week's, meeting, and this week's meeting. Once the transcribes, I'll put it in. This is really just a way for me to send you guys a bunch of information. So, I'm gonna give you a quote today. I'm gonna make this visible to you and I'm gonna put a quote for everything we talked about in here. And these are just different sections of things that we've talked about versus me sending, you know, 57 emails through this process. I'll just drop everything in here, right? And Joe, I added you in here as.

STEVEN

1:08:27 When you use recap for this?

BRETT

1:08:31 Yeah, it's something we bought. I don't know six months ago last June.

--- Purchase decision ---

BRETT

1:08:35 We bought it. It's essentially a Mutual action plan software. It's hey, there's a lot of things I gotta do in this process for you. One of those things was listening to

that demo recording and figuring out what we were going to talk about today. You guys are in talks of the core, getting intact setup. So over this.

*--- Purchase decision ends ---*

STEVEN

1:08:52 Part, is this part of service street or no?

BRETT

1:08:56 No, this is a third party vendor that we use to manage our deals better essentially.

STEVEN

1:09:01 Now, wait, you bought?

BRETT

1:09:05 No, we bought their software. We did not acquire their company got.

STEVEN

1:09:09 Okay. Yeah, John, think that it might be interesting for a.

JOSEPH

1:09:15 The action plan.

STEVEN

1:09:17 Not even the actual core but it's just like you have the recording there are?

JOSEPH

1:09:22 Mike become a project management also?

STEVEN

1:09:28 Okay. So you'll put it over here. Yeah.

BRETT

1:09:33 I will drop everything in its respective sections today. You'll get updates. I'll leave you guys a comment. Hey, this is what I put in today.

STEVEN

1:09:40 Okay. Great. Appreciate that. So.

BRETT

1:09:45 Also, did you see that email with bradbogs this morning? I did.

STEVEN

1:09:50 I think I wrote back?

BRETT

1:09:52 Okay. Cool. Take care of that? I will.

STEVEN

1:09:56 No, I didn't hold on. Can you let us know? You said, can you let us know when you might be available for all the UK which... I leave was addressed towards Brad.

--- Dispatch ---

BRETT

1:10:09 Yeah, I called or I connected with Brad on LinkedIn a couple of weeks ago, and I sent him a message... and he was like, yeah, I'd be happy to, but email is better for me. So, I just emailed them if you wouldn't mind. Hey, Brad. Thanks for your time.

--- Dispatch ends ---

STEVEN

1:10:22 Yeah.

BRETT

1:10:23 I'm free.

STEVEN

1:10:24 An email right now?

--- Accounting integrations ---

STEVEN

1:10:43 When did they go live?

BRETT

1:10:45 They've been a customer for at least three or four years.

STEVEN

1:10:48 Okay. Cool.

SIMON

1:10:50 Do you know what in software they're using?

BRETT

1:10:54 They were previously on Jonas, which was something no service software could connect with. So, they used to stand alone systems that said, I think they're in the process of moving to intact.

--- Accounting integrations ends ---

BRETT

1:11:09 And also the other reference I'm trying to get you California boiler. They just went live maybe eight months ago. They use intact, but I gotta get the, okay before I send you their.

BRETT

1:11:22 And so guys just kind of written down here is a couple of other things that I know we have to do in this process. So I know we have to demo the service team. You guys mentioned that last week, but you don't want to get too many people involved until, you know, this is probably a direction you're going. We need to have a scoping call for intact and service trade. What else needs to happen?

STEVEN

1:11:41 So, okay. We have a new director of service starting tomorrow. We have our Sage intact going on right now. You know, right now, the goal is for us to, you know, kinda look into service straight and build out as, you know, so that we have a good, you know, kind of feeling about where we're at. I think the next step will be for us to re, watch the videos, come up with any additional questions that we have. And then from there maybe do another call if needed. And then after that probably move over to the rest of the service department, which would really just be probably, you know, the new guy and maybe Rob... but, you know, it could be a couple of months at all this because, you know, we have this new guy starting. He doesn't know much about what we're doing at all. We want to finish Sage intact before we like really start like getting into the depths of this because Simon has, I don't know how many hours a week with Sage intact? And then, you know, we want to get the new guy kinda up to speed on our existing processes and let him spend time with him help desk because it's going to be very hard for him to come in and be like I really would want a service to do X or why, but he doesn't even know what, you know, he currently has.

--- Purchase decision ---

STEVEN

1:13:21 So, you know, I don't think it's gonna be exceptionally quick but... yeah, once like a couple of these things happen which I would expect to for the next, you know, maybe two to three months we'll then probably revisit it and start to be like, okay, let's make this a little bit more serious and start making some decisions and making some plans and stuff like that.

--- Purchase decision ends ---

BRETT



1:13:51 Okay. I think that's great.

STEVEN

1:13:53 We started early because we don't want to be like put up law in terms of having to make decision real quick. And I'm sure you're used to long sales cycles for this type of thing anyway. So.

BRETT

1:14:07 No, that... that's totally fine especially with you guys overhauling, you know, the whole ERP system that's the massive move in itself. I was on a part of the call but I know when Kurt called Simon, it was like you guys wanna get, do you want intact up first for a few months or do you want the service software and intact to go live at the same time?

STEVEN

1:14:30 Now intact is gonna.

BRETT

1:14:32 At first. Okay, cool. And then is there just working backwards, totally cool with this taking time. Is there a certain date that you need service software in place by? No. So.

STEVEN

1:14:48 It's you know, it's a little bit tough for us but you're saying 120 days. So it's four months. Yeah, I mean, like for me, ideally, we can have it live by like October first this year. But realistically, I don't think that's going to happen. So we'll...

KURT

1:15:10 With... intact being built specifically for you guys, there does need to be a decision on the field service solution as it pertains to the accounting build out. Is that correct? My other clients that have?

--- Accounting ---

SIMON

1:15:28 Yes and no. So... I don't think we, you know, we're going to go live and intact. You know, hopefully may or June, right? I don't think we necessarily need to make a decision that said we're at the point in the intact implementation where we're configuring you know, customers and, you know, parent child relationships with customers and kind of all that kind of stuff.

--- Accounting ends ---

SIMON

1:15:55 And, you know, I spoke to Kara who's our implementer that, you know, once we get that locked down in intact, I'd want her to go through that, you know, with

BuildOps and service trade to see what kind of, you know, feedback you guys would have to the way that we're building it out.

*--- Accounting ---*

SIMON

1:16:18 So, you know, we definitely wanna keep stage two in mind what we're doing, you know, stage one, but I don't think that we necessarily need to, you know, to finalize... you know, before we go live with intact. And to be honest, I would, you know, I would want us to be on intact and, you know, stable on intact before we're starting to really kinda configure another system because otherwise, you know, if we have chaos on system one, it's not the right time to be trying to implement, you know, system two.

*--- Accounting ends ---*

SIMON

1:16:56 And, you know, to be honest, I don't think you or your implementation team, I want us to be in a position where you're asking us questions about, you know, how are we doing things and why are we doing things a certain way? And we like, we don't know, we just went live a week ago, and we don't know what we're doing yet. So, you know, I think we very much need to lock down intact, but it's part of our planning on intact to, you know, engage with you guys to, you know, see how this would, you know, transition into a phase two?

BRETT

1:17:25 Yeah. So I love the way you guys are thinking about it Simon you hit the nail on the head. You don't want to do to overhaul implementations at once. That sounds horrible for your business and for us. So we've done it before. We don't recommend you guys are doing it the right way. All that said, I think us utilizing what you guys are seeing on your screen here just for me to update with you guys with where it's looking like you're going to be live. I will continuously update it over the next couple of months. But what I'm thinking after our meeting today is I'll go in and say, hey, you're going to go live with impact in June? I'll map it out so you guys or to show you guys when you can expect to go live with service rate. So at least you have it from my side?

*--- Purchase decision ---*

SIMON

1:18:04 Yeah. Look, let's not get to cut off here. Okay? You know, look big picture. We're comparing service trade and BuildOps, you know, they're pluses and minuses of each of them. You know, they're not, you know, in my mind, it's like two different pathways for us. You know, again, I think that you guys, you know, have certain advantages, you know, just for the service, you know, for us as a company, there are certain advantages that BuildOps brings to the table, right? You know, that's a big decision that we need to make, you know, we're taking away questions from here and going to BuildOps. You know, some of the questions that, you heard, you know, from us were from, you know, the demos that we're doing with BuildOps. So, you know, I

understand you wanting to kind of understand our thinking in our process and all that.

*--- Purchase decision ends ---*

SIMON

1:18:54 But, you know, we need time to demo it more. We need time to get to know intact more. And then, you know, everything will kind of flow from there.

BRETT

1:19:06 Yeah, that's totally fine. We're Kurt and I are here to be a resource for you guys. So you kinda guide us and let us know when you want us there, what you want us to do and we'll do it essentially... so that's said guys, my plan for after today's, meeting is, yeah, I'll put both recordings in there for you guys.

*--- Purchase decision ---*

BRETT

1:19:24 Let you guys watch them. I'll put together a quote, anything additional that I think might be useful. I'll drop in here just so you can review it. That said once Brad get back to you, Steve, give him a call.

*--- Purchase decision ends ---*

BRETT

1:19:37 I'll be in touch about California boiler. We'll get you rocking with that. When would you like me to reach out to you guys again?

STEVEN

1:19:50 Whenever you want.

BRETT

1:19:53 So, what the new guys starting tomorrow, you probably want is gonna take him at least two weeks to understand what he's even looking at, drinking out of the fire hose.

STEVEN

1:20:02 I mean, you're...

BRETT

1:20:02 From there?

STEVEN

1:20:03 You literally just call me or email me and I'll just be like, yeah.

SIMON

1:20:07 We're not.

STEVEN

1:20:07 Ready. It's going to be a couple more weeks before next steps. I, it doesn't matter. I'm just gonna tell you exactly what it is. I'm not gonna be like, but I'm just gonna be like, yeah, like we haven't looked at.

BRETT

1:20:19 No, that's all I'm asking you is great. I got a lot of bullshit answers from people. So if you can just tell me, hey, not ready, cool.

STEVEN

1:20:27 To tell you the truth and...

BRETT

1:20:30 Like it.

STEVEN

1:20:31 That's it.

BRETT

1:20:33 It's all I want. Appreciate you cool, guys. Is there anything else you need me to send you today?

STEVEN

1:20:39 I'm good right now. I want, I do wanna watch demo because if you like it'll, be very helpful and yeah, I think we're good for now.

BRETT

1:20:50 Okay. Give me an hour or so. I'll put everything out. I'll leave a comment. You'll get notified. I will put Kurt contact information on here too, so you can reach either of us any time. But just let us know if you need anything, and I'll be in touch.

STEVEN

1:21:03 All right. I appreciate it, guys. Take care.

BRETT

1:21:05 Got it. This.

KURT

1:21:06 Is good now?

*The End*