GONG

ServiceTrade Demo with Mountain States Fire Protection

Harrison Miller with Mountain States Fire Protection
Recorded on 9/26/23 via Zoom, 1 hour 37 min.

Participants

ServiceTrade

Harrison Miller
Territory Manager

Chris Resta
Associate NorthBoundary Account Executive

Mountain States Fire Protection

Jim Kyle
Owner

Other

Trudy Estep

Topics

Transcript

HARRISON

0:00 Are you doing good?

JIM

0:01 How are you? Hold on? Let me grab Jim. Hold on. Let me grab Jim.

HARRISON

0:06 Okay.

HARRISON

1:01 Okay. He's here now. Hey, Jim. Hey, Trudy. How are you two doing?

JIM

1:06 Doing good. How are you? I'm doing well.

HARRISON

1:09 I'm doing good. Thank you both for hopping on and chatting with me here today. I assume it's just the three of us, correct? We're not waiting on anyone else, are we?

JIM

1:18 No, no.

HARRISON

1:19 Okay, perfect. Well, cool. Thanks again. And just to make sure my notes are correct, Jim, I have you as the owner and truly, I kinda have you as wearing all the hats in the office. Is that correct? Yeah. Okay, cool. Cool. Well, quick introduction of myself then I am Harrison Miller with service trade. Obviously, I am one of the territory managers over here. Really just kind of my goal rough agenda for today is, you know, we'll spend a large portion of the time today, me sharing my screen, walking you through service trade, addressing questions, things like that for we did that just kinda wanted to get a little better understanding of, you know, the company goals for the business, things like that.

--- Purchase decision ---

HARRISON

2:00 And then we'll dive into it if you to like what you see. We can certainly discuss next steps at the end. If we think that makes sense. Does that work for you to?

JIM

2:09 For sure?

HARRISON

2:10 Yeah, perfect. Cool. So, Jim, I know you met with at a FS a. True to you. Were you at Afsa as well? Yeah, nice. Nice.

--- Purchase decision ends ---

JIM

2:20 Okay, cool. How how was that?

JIM

2:23 It was nice.

JIM

2:24 Yeah, it was fun. Good.

HARRISON

2:26 Good to get away from the office for a little bit.

JIM

2:29 Yeah.

HARRISON

2:32 I don't blame you at all. I was kinda hoping to catch the invite on that one. I was at not a FS a NFS a up in Chicago a few months back, and that was, it was a lot of fun. It was nice meeting people and, you know, like I said, it's I think more than anything, just nice to get out of the office for a little bit. But yeah. So, I saw on the notes from the conversation that you two had with us at a FS a, that, you know, you attended the recurring revenue presentation that we put on.

--- Type of work ---

HARRISON

3:05 And that was kind of one of the things, that you were focused on from the, you know, point of view of the business. So kinda curious. I mean, what, what's the breakdown of the business currently in terms of, you know, service inspection, install, things like that?

JIM

3:19 I would say we were at a 75 25 install service.

HARRISON

3:29 And, is that kinda the breakdown that you want to keep it at? Or I mean, what, what's the goal for that?

JIM

3:33 No, it sounds like I want to get more into the service and less into the new install or about 50 50. We'll try 50 50 first before we.

HARRISON

3:46 Yeah... awesome. That's that's a really good breakdown right right there, you know, obviously service trade, we can help out with the install side. A lot, you know, keeping track of, you know, your job Progress, work history, things like that. But a big thing for us, you know, how we're going to be a revenue generating source is, you know, a lot of it comes down to the service side as well.

--- Customer engagement ---

HARRISON

4:10 So being able to, you know, log deficiencies while we're out in the field and, you know, reducing the turnaround time on quotes and things like that. So I'll be sure to kinda touch on both of those today.

JIM

4:22 How many, how...

HARRISON

4:22 Many technicians do you guys have?

JIM

4:26 I think we have three, we have three technicians and then me and then Trudy in the office right now.

--- Type of work ---

HARRISON

4:34 Okay. Gotcha. And so, so three texts including you or three texts plus you?

JIM

4:38 Three texts plus me.

HARRISON

4:40 Okay, awesome. That's a, that's a pretty good breakdown as well. What?

JIM

4:48 And in...

HARRISON

4:48 Terms of the work that you're doing now in terms of like the assets or pieces of equipment, what's the breakdown of that like sprinklers, alarms, backflow, what's that looking like?

--- Type of work ends ---

JIM

4:59 What do you mean as far as?

HARRISON

5:02 Yeah. So, so assets, you know, in terms of, are we doing more like work on sprinklers? Is it mostly like alarm work? I was just curious like what was that looking like?

JIM

5:11 We're we're dabbling right now, in alarm, we got a monitoring contract finally and we're starting to push that product as well.

--- Type of work ---

JIM

5:21 We are getting a lot of monitoring contracts as well. We do have a lot of clients that are asking if we do monitoring as well as the alarm and sprinkler, the whole thing. So, yeah, we're starting to do that. We're doing underground repair now as well. We're being called by jurisdictions just to do the testing and flushing of the underground after our repairs are made by an excavator.

--- Type of work ends ---

JIM

5:56 So that seems like a little niche that a lot of people are doing. We're doing that as well. We don't do hoods, we get a lot of calls. I mean, it's almost like maybe we should hire somebody that does work on hoods, sure. But at the same time, we have stayed away from that, for a long time. We do extinguishers.

HARRISON

6:22 Okay.

JIM

6:24 So, we pretty much do everything we tell our customers. We can do anything and we can always outsource anything. So.

HARRISON

6:31 Absolutely.

JIM

6:32 Absolutely.

HARRISON

6:32 That, that makes complete sense. Okay?

JIM

6:36 Well, cool. That gives me a...

HARRISON

6:38 Kind of a good background of the business. You know, obviously you spoke to us at ATS, but I mean, just kinda curious, I mean, in terms of something like service trade or just software in general.

--- Forms ---

HARRISON

6:48 I mean, is there anything in specific that you're looking for or kind of a workflow that you're looking to, you know, to get some help with?

JIM

6:56 What do you think they're on that one?

JIM

6:58 Well, they wanna be able to do their reports on their tablets while they're out in the field automatically, you know, check their boxes on their reports and then be able to sign them and upload them to their.

--- Forms ends ---

HARRISON

7:13 Jurisdictions...

JIM

7:15 Yeah. And other clients?

JIM

7:17 And to the clients?

JIM

7:18 And that was another issue. We also need a copy on our hard drive at our office. So, when a customer calls and said, you know, I see the deficiencies if I didn't go out and do the inspection, I'm not familiar with the deficiency.

--- Tech On-site ---

JIM

7:36 So I need something to be able to pull up and look at really quick in order to see, yeah, I see you have deficiencies right here. And then of course, they wanna know the price right away too.

JIM

7:48 So, the best flow of that would be when the technician finishes signs, it sends it to the customer, the jurisdiction at the same point.

--- Access to information ---

JIM

7:59 He needs to be able to send it to our home computer, you know, here at the office where Jim can then upload it into our Google drive. So, and I can Bill it.

JIM

8:11 Also, have I wanna interrupt real quick? We, we have an issue with, when you hire a service manager, and then all of a sudden all these clients start calling them on their cell phones.

--- Access to information ends ---

JIM

8:26 We don't we don't get in any of this information. And at any point in time that service manager could walk away with your clients.

HARRISON

8:38 Exactly.

JIM

8:38 It has happened three times since I have owned the company. So, I mean, I told one of the guys that I just hired, I said I feel like I should just offer, go around and solicit to all the service managers of all these, all the other competition to pay them 75 bucks an hour just to get them to come over to mountain states and then take all the, take all the clients that they bring with them.

--- Access to information ---

HARRISON

9:06 Right.

JIM

9:07 And then just say now that we have all the clients, look how big we are, you know?

HARRISON

9:13 No.

JIM

9:16 They...

JIM

9:16 Go away. They go to somebody else.

JIM

9:18 Right. And they give everybody their personal cell phone number instead of saying, you need to call the office to schedule your appointments or for any questions. Everybody just gives out their cell phone number. So I don't know how to break that habit of the service managers. I mean, he's just as bad. Yeah, I don't know what jobs he's on.

JIM

9:41 Customer will call me and I don't know how they got my phone number, just a referral to whatever.

--- Paper process ---

JIM

9:48 And then next thing, you know, I'm jumping in my truck and going to help them out. And, and I don't write down stuff. So things slip through the crack and we don't get paid for the work. I just did.

HARRISON

10:01 Exactly. So, so basically, you know, it seems like really what we're looking for here is to have all this information that we're doing out in the field, kinda be stored in one centralized location, right?

--- Paper process ends ---

HARRISON

10:15 So, you know, all the customer information obviously. So, you know, whenever, when, if that service manager does leave, you know, back in the office, we still have

access to all their information. You know, we can keep a file on all of them. But also Jim, it seems like a big thing for you for, the new people that are randomly calling you is to be able to have that service history from the last time, you know, we went out there, right? So you're not going in blind? You know, we can pull up old inspection reports. We can pull up old, you know, service history, things like that. So, so you're going to be well informed. I think you mentioned that you didn't but I mean, what's kinda what's kind of the process or, you know, whenever you are going in there blind, I mean, do you have a way to figure out that information?

--- Recurring maintenance ---

JIM

11:03 No. When, when a customer calls, we, I mean, and that's another thing we try to refer, you know, you get those calls daily. You know, we'd like to get a quote from you on your inspection, annual inspection. It's like, well, the first thing I need is, can you provide me with last year's report?

--- Recurring maintenance ends ---

JIM

11:21 Because then I can see all the devices that are, that your property has in order for us to put together a quote for you? And... that's what we're asking from our customers prior to us even going out to them and giving them a quote. But a lot of times they want you to come out and it's like, wow if we could just take, can go look at everybody's job, all the time. We really wouldn't really would not be making money.

HARRISON

11:51 Yeah. Well, and, you know, again, it's one of those things, you know, having to go out there, you know, or pull up as them for the previous inspection report? I mean, what would it do for you guys in the office? If we already had all that information stored within ServiceTrade?

JIM

12:06 Well, he's talking about new.

JIM

12:08 Now.

HARRISON

12:09 Okay. Gotcha.

JIM

12:10 Not our current clients, you know?

HARRISON

12:12 New customers.

                    JIM

12:13 Call him, somehow, they get his information, somebody's given it to them and referred him. So they call his cell phone. So he has no previous information on the company.

                    JIM

12:25 Have the one that, we got a Bill right now. We're trying to figure out who to send it to. I mean, we don't yeah, just calls out of the blue. The work order should have had you need to, it's completely blank then you need to have your service guy get all the information he can from that client prior to even doing the inspection.

                 HARRISON

12:46 Absolutely.

                    JIM

12:47 What?

                 HARRISON

12:48 Yeah.

                    JIM

12:49 Great. What's to keep service trade from getting 3,000,000,000 clients and then starting their own company doing all their, it. M.

                 HARRISON

13:00 Well, I would say that, I would say the big thing for that is you could probably look at me and tell me that I am not a blue caller guy.

                    JIM

13:08 So, even if I had you.

                 HARRISON

13:10 Customers information, I highly doubt I would be capable of inspection for them. So, so I don't...

                    JIM

13:17 You see what I'm saying? Look how large you are, you know what I'm saying?

                    JIM

13:23 I'm assuming that's in a contract somewhere, you guys aren't allowed to sell our information or steal our information.

--- Access to information ---

HARRISON

13:30 Correct. Yeah.

JIM

13:32 That's part of.

HARRISON

13:32 Your contract, you know?

JIM

13:33 We're not going to sell...

HARRISON

13:34 Your information. And we have that very clear in writing as well. Also. I will say to service trade a cloud based system and essentially what that means is that we don't own that information. You want it, you know, you'll look at some of these other like web based companies and you know, they have access.

--- Access to information ends ---

JIM

13:53 CSS to that information. So they kind of on it.

HARRISON

13:55 Anytime you want to pull it, anything like that, you know, for whatever reason, five years down the road, you decide, hey service trade is not working for me name or, yeah, you have full access, you have a...

JIM

14:05 Exporting capabilities.

--- Paper process ---

HARRISON

14:06 We don't actually do that. So you're definitely in good hands with that. What, what about, how are you guys keeping track of? Like what jobs are coming up or, you know, what jobs are, do things like that?

JIM

14:20 Well, we pretty much just... hand out, ask the customer when it's convenient for them for, to have an inspection, they usually tell we'll tell you a lot of them work from home.

--- Paper process ends ---

JIM

14:32 So it's variable. And then we just kinda try to hit those as we're going to do another appointment so that, you know, you're killing two birds with one stone, saving a little bit more in trip charging as well. But, you know, some of these on indeed, you see where some of these guys are doing.

--- Pricing ---

JIM

14:54 They're they're stating that they do five to seven service calls a day. And when I talk to my alarm guys, like what kind of service calls are you doing? If you're doing five to seven a day? I mean, because I can't go anywhere and do five to seven unless that's a really long day spending a couple of hours at each place, drive time and everything.

--- Pricing ends ---

JIM

15:18 But I mean that's what a lot of these alarm techs are saying, maybe they're just going and changing batteries from one location to the next.

JIM

15:28 We don't have a lot of contracts right now for big jobs because our engineer had a stroke back in April. So there's not a lot.

--- Implementation and ongoing support ---

JIM

15:39 I mean, when he has a big contract, it's usually set up on a time schedule, you know, like the beginning of the year, we were doing a big warehouse and we started it in January. It needed to be done by April. So that's where the concentration was for those four months. And then we did service work, you know, in between.

--- Implementation and ongoing support ends ---

JIM

15:59 I pretty much didn't do any service work whatsoever, for four months because we were consumed with, this warehouse. And right? All we could do is just tell the customer we're swamped right now. We're we have too much work going on. We can't we can't help you out, you know, call someone else. You say that, but at the same time, if a customer calls and says this is, it's an emergency, I got water flowing. I'll stop whatever I'm doing and go help them out. I don't care if I'm at a warehouse or whatever that's an emergency. But at the same time, you know, they understand, if you just talk to the customer and say, you know, we're we just have this big job going on right now and we're swamped with work.

HARRISON

16:48 Yeah... no, no, I definitely understand that.

JIM

16:54 You really don't have, a scheduler or anything like that, I would say Trudy would be the would be the person that would try to be the scheduler and...

JIM

17:05 When they call the office.

JIM

17:06 When they call the office.

JIM

17:07 I was try and get, a day and time that they're available.

--- *Paper process* ---

JIM

17:11 And then I always call Jim and say this person needs, this is the time they're available. You know, can you do it during that time? And then I usually call the customer back. Is the biggest thing is getting those reports from out in the field done uploaded to the jurisdictions in a timely matter and getting them, into me to get the bills out immediately because I don't like billing somebody a month after we did the job because one, it looks bad, you know, and to that holds up our cash.

--- *Quoting* ---

JIM

17:48 And then your deficiency report?

JIM

17:50 Yeah. With.

JIM

17:51 An estimate?

JIM

17:52 Yeah. With the estimate, we're not the new guy's not following up with his estimates, you know, because he hasn't even done his reports.

HARRISON

18:01 No, yeah. So, that was something I wanted to touch on as well is like the quoting estimating side of things. I mean, what, what's typically the turnaround time on that?

--- *Access to information* ---

JIM

18:16 With me, I typically try to send my report with an estimate with the Bill. So they have all three. But getting that across to new hires seems to be a little.

JIM

18:33 He does, the new hire actually has service trade on his tablet. Yeah, the last two companies that he had worked for actually had used a service trade, but of course, we can't use it because it's I'm assuming it's still in their cloud, but he does have it on his tablet, so he knows how to use it.

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

JIM

18:56 I just don't know what they used it for or anything. But the big thing is reports, you know, and giving them the follow through and getting them billed with the estimates if there's deficiencies and, you know, not holding it all up for.

HARRISON

19:12 Exactly. And you know, really kind of our goal here.

--- *Customer engagement* ---

JIM

19:15 We're looking to do.

HARRISON

19:16 You know, we had touched on a little bit earlier about, you know, that service history, things like that, but also, you know, just making it easier out in the field for all this information to kind of flow from the field to the office to the customer to the jurisdiction.

JIM

19:30 Whatever that may be.

HARRISON

19:31 And what I mean by that is make it easy for your technician to log efficiencies, make it easy for them to, you know, fill out their inspection reports and just kind of increase this flow, need a couple of clicks of a button. We can produce a quote, a couple of clicks of a button. We can produce an invoice, couple of clicks of a button. We can get this inspection reports.

JIM

19:47 No. Okay. I don't want invoices. I don't want the guys doing any kind of invoicing because I have to get it into our Quickbooks. So I manually do that. I don't want, I don't want them to be able to mess with anything on my office computer. Nothing sure.

JIM

20:07 I just send me the stuff and I can take it from there. Yes, my big question here is I can't even get these guys to click a button to punch in on T sheets. What's what's gonna make them push a button to do their inspections?

HARRISON

20:27 You know, I think.

JIM

20:29 A lot.

JIM

20:29 Of, I mean, there's a few things to.

HARRISON

20:31 Really, you know, a lot.

JIM

20:33 Of it is gonna.

HARRISON

20:34 You guys internally kind of enforcing this to, hey, this is in.

JIM

20:37 Sent that we've supported.

HARRISON

20:39 You know, you need to buy into this, also understand that this is gonna make your job easier, but a lot of it is going to be on our end as well.

HARRISON

20:47 So, what we're gonna do is we're going to provide you guys with training. We're going to provide you guys with certification courses from the office but also for the technicians out in the field as well. So really, they're not in the dark you.

JIM

21:01 They...

HARRISON

21:01 Can learn the system pretty quickly by intuit, really find the true power and efficiency of service trade and help them understand, you know, hey, we can do these jobs easier.

--- Paper process ---

HARRISON

21:12 We can get information easier collected through ServiceTrade than, you know, from a paper process like you're currently doing now. So it's going to be on us but it's also going to be on you guys as well to kinda have them buy into that. Okay? But, but, I think a big thing is as we go through this today, you know, hopefully my goal is for you to understand, you know, hey, this is gonna make the office easier, but it's also going to make our technicians point of view easier as well.

--- Paper process ends ---

HARRISON

21:38 It's gonna make them more efficient. And hey, this is something that I can, I think I can get them to use. So that's really my whole goal for today. But this has given me a really good understanding of what it is that we're looking for, you know, kind of a breakdown of the company. Is there anything else that's top of mind for you too that you want me to know about before we dive into this?

JIM

22:00 I think you had asked how, what's the process we're using the one of the, I think it's the 2019 pa, got it out of the workbook.

--- Forms ---

JIM

22:10 The E forms in pa, 25 E forms. So typically, we get, we do our inspection, we get make notes and then we go back to our computers or laptop or something like that. I do this is how I do my, I go back to my computer laptop or whatever. And then I pull up the E forms. Go ahead and type in the address and the company name, and that general information. Then I just go through the checkbox, working my way down through the inspection on that E forms in 25 forms. And then I just at the bottom sign it at the end of that, and then I would have to... click save on my laptop.

--- Paper process ---

JIM

22:53 I would have to print it. I would have to scan it in order to get onto.

JIM

23:00 Or Google service.

JIM

23:02 Google drive or whatever.

JIM

23:04 I actually just took that step away with your bull zip printer.

JIM

23:08 And then, and then give the copy that I printed to Trudy in order for her to use it to send a Bill out... right?

--- Paper process ends ---

JIM

23:18 And then I have to put together the just a quick invoice, you know, to minimum to our minimum 75 dollar truck charge and as far as an invoice, and then formulate a deficiency repair list and give them that way the customer has it without having to contact you prior to sometimes I feel like that's not a good step by the way just between me and you. I think if you give out the price too early that kinda lets them know that they should be checking other people's prices. So your prices where to me. I think it's almost better especially with the compliance engine all of a sudden that come up. That customer get it's, a notification that they have 10 days to get these deficiencies repaired.

--- Paper process ---

JIM

24:09 They're calling me and saying, can you come out and take care of that? Well, that's better than any time giving out any estimate any day. And that's what we're getting is just there's so many phone calls where people are just asking us to come to it, do work, do this? They're not even asking for estimates anymore. And that could be because of word of mouth, they know that we don't charge as much as everybody else, right? At the same time. You know, that if we don't have to do that legwork putting together an estimate, that's fantastic. But then, if a customer calls you a month or two from now and ask you to give them a price quote on the deficiency repairs for that inspection you did two months ago, it may be hard to remember all the items, yeah on that. So.

--- Quoting ---

HARRISON

24:59 Yeah, no, you're exactly right. And, you know, kind of that process that you're talking about, you know, in terms of just submitting that inspection report to or the jurisdiction and not submitting the quote, I mean, really that comes down to personal preference, but really, I think you bring up a great point though in terms of, you know, hey, if we're not sending this quote out, but, you know, a month, two months from now, they're asking for that quote with the deficiencies, I don't know what to tell them, right?

--- Quoting ends ---

HARRISON

25:27 You know, I mean, they're trying to rely on my memory on pulling through old files. Anything like that. One thing service trade is going to be really good at is storing all this information specific to a customer. So, you know, if I wanted to go in, let's say we're working at a Dick sporting goods or something like that.

--- Quote templates ---

HARRISON

25:42 And I want to pull up, you know, hey, this quote from two months ago, I'm going to be able to see all this stuff directly.

JIM

25:47 From this location. So you don't have to send it, you can save it. You can go ahead and make a quote and just save it in your.

--- Pricing ---

JIM

25:54 So then I would suggest to all my service techs or whoever. If, you know, you got a five year hydro or a five year internal inspection coming up, just take a quick look at the system. If it looks...

JIM

26:08 Standard.

JIM

26:09 Like a standard price you would be given out, then that's fine. You don't have to pursue anymore. But if it looks like you're going to have to do a whole bunch more on that five year, then normally, I would be better put a comment down on your inspection report that because you don't want to give a customer the average cost for a five year when, you know, it's gonna be, it could be double because of just the situation that they have at their facility.

--- Pricing ends ---

JIM

26:37 Yeah, exactly. And you know, some of these more complex cases like that, you know, hey, maybe.

HARRISON

26:43 We...

JIM

26:43 Want to get an extra set of.

HARRISON

26:44 Eyes on this. Maybe we don't want to quote this right now, you know, let's just send this back to the office. We'll store this and, you know, we can do the necessary.

JIM

26:52 Then that's the problem that's the problem. Let's pretend it wasn't me who did the inspection? And then I'm getting that phone call and he and my tech can't remember. So it's like what? Then? I gotta go out and look at a job that you did in order to give a price quote to somebody.

HARRISON

27:11 Yeah. And honestly, Jim, that's the exact problem that service.

JIM

27:14 Trades looking to.

HARRISON

27:15 Solve for you. So, you know, if you don't have the...

JIM

27:19 Notes?

HARRISON

27:19 You're not having to drive back out.

JIM

27:21 And...

HARRISON

27:21 You know, providing another estimate for, you know, have all this info?

JIM

27:25 Formation within service trade, you know?

JIM

27:28 Videos...

JIM

27:30 Anything?

JIM

27:30 Like that specific to what it is that we found?

HARRISON

27:33 And you...

JIM

27:34 Know, our comments or notes?

JIM

27:36 Thing like that.

JIM

27:37 So, you know, if some...

HARRISON

27:41 Random technician, does this, let's just say, you know, he did it a month ago, he left our company two weeks.

JIM

27:46 Go, I can't get in contact with them still within servers trade. I'm gonna know exactly what it is that was fond and I'm gonna be able to get them.

JIM

27:54 Accurate quote directly from that, that's...

JIM

27:57 Really one of the main goals. It's just kind of.

HARRISON

27:59 Keeping this centralized location, you know, between the office between all of the technicians. So, you know, we're not having to rely on memory and we're not having to drive back out there and give them another quote. We're going to have a...

--- *Accounting integrations* ---

JIM

28:12 Information in service trade. Yeah.

HARRISON

28:16 Cool. We will, we'll definitely touch on that quick question, but I mean, before we dive into this thing here, are you guys like actively looking to get on a software now? Or I mean, what, what's kind of the timeline for you?

JIM

28:32 Well, I was looking at the service trade and building reports. A lot of people were saying building reports was a good one as well, I think is building reports.

--- Accounting integrations ends ---

JIM

28:42 No, it's building ops because they've been calling.

JIM

28:45 But anyway, I wanted to check them out. I mean, yeah, you both have been out there for a while so.

HARRISON

28:52 Yeah.

JIM

28:54 I just wanted to check them out to see.

HARRISON

28:56 Absolutely. Yeah, we'll do that. I'm I will. So I'm very familiar with BuildOps as well. I would definitely recommend checking them out. You know, I'm definitely not the one to talk down on a competitor. But one thing I do want to keep you guys in mind, you know, as you go through that evaluation is that service trade. We've been around a little over a decade, started out in the firing life safety industry. We branched off to the mechanical a little bit, but we have over a decade in fire and life safety. BuildOps is kinda the opposite. They started a few years back in the mechanical. They're trying to break it now to the fire in life safety side. So I can confidently say, you know, in terms of resources experience, you know, for the fire and life safety side, and I do think we definitely have the upper hand on that and I think it kinda shows in our work.

JIM

29:43 Flows and kind of what we're...

HARRISON

29:44 Designed to do here... but anything else for me before I share my screen?

JIM

29:51 No, I don't think so.

HARRISON

29:53 Okay, perfect. And let me know if, when you all can see my screen, okay?

JIM

30:00 We can see, but I'm gonna move your head.

HARRISON

30:03 Okay.

JIM

30:05 Okay.

HARRISON

30:06 Perfect. Yeah, I should say service trade product overview on it. Yep. All right, perfect. I am gonna read off about two slides to you. This is not a death by powerpoint, but I do want to provide a little context on service trade who we're working with. What we're really looking to do here. But really quickly again, I touched on some of this but, you know, we've been around a little over a decade now. I started out in the fire in life safety industry, branched out to the mechanical a couple of years back, but to that, we currently have over 1,200 active customers within North America and through our customers, you know, they have actually serviced a little over 10 percent of the U.

--- Type of work ---

HARRISON

30:43 S commercial and industrial buildings just to say this to let you know we are working with companies similar to you, have similar workflows. And we do have the resources available to help you. But really, you know, whenever we look at service trade, you know, we look at how we can use you, it to do a couple of different things, right?

--- Customer engagement ---

HARRISON

30:59 So the first is going to be to control your cost. So improving your service and project operations as well as setting your technicians up for success. It's really a big reason why a majority of people view platforms like service trade in the first place. I think what they find though maybe more importantly as they begin to use it is that we can also help you grow this quality revenue for your business. So helping you focus more on that top to your customer base. So you don't really have to worry as

much about that bottom 10 percent of the customers that are maybe a little bit more difficult to deal with. So finding that quality revenue that you won't and then just growing more of that. And really how we're going to help with this is by helping you sell more service contracts, capturing those additional repair or efficiency opportunities, and really just grow in that customer loyalty for your business just by providing that per.

JIM

31:49 Your customer service?

HARRISON

31:52 But really at our core, that's who we are, and that's what we're looking to do here.

--- Customer engagement ends ---

HARRISON

31:57 Any questions on any of that before we dive into ServiceTrade itself? No, no. Okay. Cool. I always try to keep those really brief. Can everyone still see, my screen? Okay?

JIM

32:11 Yup. Hold on like maybe back to the other side?

HARRISON

32:16 Perfect. So this is service trade right here. There, there's gonna be three different views of service trade.

--- Access to information ---

HARRISON

32:23 So we're going to have the view from the office. We're going to have the view from a technician out in the field. And then we're also going to have the view that your customers would see like on those quotes invoices, inspection, reports, things like that. So I'll walk you through all three of those today.

--- Access to information ends ---

HARRISON

32:37 But we're gonna start right here in the office. This is our service dashboard. It's the first thing that you would see whenever you log into service trade from the office point of view. And really what this is a 1,000 foot overview of the different stages of your workflow. So for starters, we're going to have a snapshot of our daily schedule. I was gonna let you know who's where, throughout the day. What kind of job are they doing? Is the job complete or not? Are overdue jobs? So, you know, we can keep track of all those jobs that slip through the cracks for whatever reason, you know, let's be proactive. Let's go ahead and get those scheduled back out. Our jobs do in the

next two weeks. So we can see all of our upcoming work. Again. Let's be proactive. Let's get you scheduled out. They're not overdue just yet, but it's coming up here pretty soon. Let's go ahead and get this on the books.

--- Tech On-site ---

HARRISON

33:29 Our past jobs mark to be complete. So this is where that technician out in the field is going to complete that work order. All this information is gonna come back into the office in real time. True to, for you to look at it, you know, make sure everything looks okay on it before we actually send that invoice out to our customer.

--- Tech On-site ends ---

HARRISON

33:47 So, you know, you'll be notified if something was found, right? This one's got paperwork on it. Maybe I wanna take a look at that. This one has an inoperable efficiency. Maybe I wanna, you know, take an extra look at that and make sure my origins look okay. After you mark the job complete, it's gonna drop it down to this completed jobs to be invoice bucket. So we know what jobs are done. Now, all we actually need to do is just send the invoice out to our customer. So again, just a real high level overview of the different stages of our workflow. Truly, I would imagine this would probably be a little more specific to you. I mean, what are your thoughts on this?

--- Recurring maintenance ---

JIM

34:23 Go back up because I thought of a question and now I forgot what it was. Okay. It is. So is there a way that we can set up? Because every year there everybody has their yearly like backflow inspection or fire inspection. Can we get those uploaded into the system? So it will automatically show us every month who's due for backflow and fire inspections every year?

--- Forms ---

JIM

34:50 And with that typically out here, in the Denver area, customer will get a notice 30 days prior to their last inspection, letting them know that, their inspection is due for their backflow or their fire sprinkler system or their whatever. And they'll pick up the phone right then and call and say we need it right now.

--- Forms ends ---

JIM

35:12 It's like, no, no, you don't this is your 30 day, no, you just got a 30 day notice. You just need to schedule it... in advance now, as long as you get it done within that 30 days prior to that last inspection you had.

HARRISON

35:28 Right. Yes. So to answer both of your questions, yes, that's absolutely something that we would be able to do.

--- Recurring maintenance ---

HARRISON

35:35 What's going to happen is whenever you get set up with service trade, we're gonna go through and fill out what type of services are we doing for this specific location? So, you know, if we're doing an annual backflow, right? We're gonna set that up within the location. Whenever we get that set up, everything is gonna run in the background for you. So you...

--- Recurring maintenance ends ---

JIM

35:56 Know.

JIM

35:56 If it's it hasn't been.

HARRISON

35:58 Scheduled out, you know, before the two week mark is gonna put it right here. You'll be able to see what kind of work is it? So this stands for wet sprinkler alarm, backflow, things like that. You can also run reports. This is just the dashboard. So.

JIM

36:14 It's set at...

HARRISON

36:15 Two weeks, but you can also run reports on jobs. Maybe I wanted to run a report on all my jobs that are going to be due next month or something like that. You can run a report on that and you can go ahead and get this scheduled out or reach out to the customer and find a time for it. Jim kind a chance. Your question as well. We can also send like appointment reminders as well, you know, kind of filter down the date range that we want to send that out to. And we can kinda do all that stuff within service.

JIM

36:39 So, we would have to go back, and put in all of our current customers. And when their next appointment is due, in order for this to start working continuously every year, right? We would have to hand put all that information. And to begin with.

HARRISON

36:57 Not necessarily. No man. Where does, where does your customer information live now? I assume like a Quickbooks or something.

JIM

37:04 Well, yeah, I have, I mean, I can tell you the last time somebody had a backflow gone, but it doesn't send out anything reminding Jim that it's...

JIM

37:13 Do we have always relied? We have always relied on the customer to give us a call to let us. I mean, I, I've never been an advocate of a contract. So, I mean, I think it's unfair that if somebody's not happy with their sprinkler company, they should be able to pick up the phone and call me just as well. As if they're not happy with me, they should be able to pick up the phone and call someone else. So, with that being said, we kinda rely on the customer to pick up the phone and call us when they want a, an inspection because for one, you know, if they know that they have a vacation coming up or something like that or a bad week that they don't you don't wanna just, I mean, they could tell you that over the phone, you know, let's schedule it, you know, third week in September or something like that. But at the same time, if we had previous, if we already have previous clients that, you know, that are coming up, I think you're what you're saying is you're gonna have to input it?

JIM

38:18 Yeah. Well, a good example is we've got a guy that owns what probably 50 buildings and he sends me in the mail. He's the cutest.

JIM

38:29 He does not do internet, he does not.

JIM

38:32 Internet, he doesn't make phone calls unless he absolutely has to. I will give an envelope filled with the.

JIM

38:40 Letters.

JIM

38:41 Letters from, the city saying your backflow is due by and every year he sends us these and it lasts for two, three months because he's got so many buildings, you know, and he just mails them to us and knows we're going to go out and get them done for it.

--- *Recurring maintenance* ---

JIM

38:59 So, I would have to, if I could, if you could put that into the system, you would know like March of next year, you know, Bill, Barbara's, got these 15 buildings that

are due at this time. And Jim would know already without having to wait.

JIM

39:16 And also don't then I wouldn't be trying to schedule any other clients during that.

--- Recurring maintenance ends ---

JIM

39:22 Hi, because he would know that he's got those coming up.

HARRISON

39:28 Exactly. And you guys are kinda hitting, the knell on the head out on this to Trudy to kinda answer, your first point part of your onboarding, you know, you're not going to have to go in and manually add all your customers into service trade. We would actually do that for you during your onboarding. So your customers locations, price book things like that. I wanna make that as simple as possible for you to get set up.

JIM

39:53 And then to your next point and special.

HARRISON

39:54 About the guy that's sending you over, the mail about, hey, you know, I need to get this back close, schedule out things like that.

--- Recurring maintenance ---

HARRISON

40:03 Yeah. So, so what we're gonna do is we're gonna get that filled out like on the actual location page within service trade. So you're gonna be able to see all that information. You know, hey, Bill has a backflow inspection coming up next month.

JIM

40:17 You...

HARRISON

40:18 Know, if I don't get one of these letters from them, I could probably reach out to them and go ahead and schedule it out, or anything like that.

--- Recurring maintenance ends ---

HARRISON

40:26 So again, we're not having to wait on the customer call, you know, if we get that customer call, that's great. But we also know, you know, hey, XY and Z customer has all this stuff coming up, you know, next month, let's go ahead and start getting that scheduled out for him. So, yes, all that information is gonna live in.

--- Accounting integrations ---

JIM

40:42 Service rate 100 percent.

JIM

40:45 Okay. And you said something about you guys would download our customers or whatever you need to know upfront right here, Quickbooks. We are, we are old school. I mean, we're old, we're paper people. So the only way we have customer information is through my Quickbooks, and we don't we do not even use Quickbooks to its full extent or billing.

--- Tech time tracking ---

JIM

41:17 Basically our billing, we don't even and do payroll through it. We use adp for payroll. So it's very, I mean, the information is in there and I'm sure there's a way to download it out of Quickbooks, you know, export it and export it into your system. So, yeah, but just to heads up, we're old school where we were paper people, you know, we don't you do a lot of text stuff.

--- Tech time tracking ends ---

JIM

41:41 I think that's why it's taking us so long to even do this because, you know, it kinda takes everything out of our control whether like we're used to doing, you know, so we've waited so long the even attempt to do this.

HARRISON

41:57 No, I completely understand that. And that, that's not the first time I've ever heard that.

--- Accounting integrations ---

HARRISON

42:02 Trust me, you guys are definitely not alone in that. And I understand that, you know, especially whenever you've successfully operated something one way for an extended amount of time, it definitely can be hard. One thing I will say to you on the Quickbooks side of things is that, the large majority of our customers are using a Quickbooks of some sort, whether that be the desktop or the online version that's what we have the most experience with in terms of an integration. But also in terms of getting this data exported, we have a really extensive team that really knows what

they're doing, okay, what to pull, what not to pull? I don't personally get that. I don't really deal with that side of things, but, you know, we're very familiar with Quickbooks. And if that, you know, you have information in Quickbooks, you're going to be in good hands with.

--- Forms ---

JIM

42:52 Is, is this also integrated with compliance engine?

JIM

42:57 So compliance in?

HARRISON

42:59 So honestly, it doesn't really play nice with softwares like service trade. I don't wanna say we have an integration with compliance engine, but neither does anyone else really. But what I mean by that is, you know, it might not directly integrate with compliance engine, but it's gonna make it a lot easier to get all these, all this stuff sent over to compliance engine. And I think you'll see what I mean as we go go through this. But like taking these inspection reports is gonna upload it as, you know, an online version directly into the office. From there, you can just go ahead and download that and submit it into your compliance engine. So to answer your question, no, does not integrate with compliance engine. Is it gonna make it easier 100 percent? Yes.

JIM

43:40 You still have to physically input each deficiency... on compliance engine as just based on be looking at, your inspection report and be typing on compliance engine to input your deficiencies that you see that you have for their inspection.

HARRISON

44:02 Yeah. I mean, essentially, so you mind, I'm a little green I guess or a little ignorant and what exactly goes into compliance engine. Are you just submitting the inspection report or you actually log in?

JIM

44:14 They want you to go ahead and download the inspection report. So, I'm assuming that's what you meant by just download it. So you can download it easy. That's an easy fix to download something on the compliance engine. But they also want you to list out each deficiency because when you go out to make that repair, then you can get back on compliance engine and do that check box and show a picture of, the fix that you made in order to get that off of, their deficiency list, but it's still manual input and that's a step. A lot of people don't do if a customer doesn't tell you they're on compliance engine for one, you don't do it. And then all of a sudden they'll call you back and say, well, I just got a phone call from the fire department and they said that, your fire sprinkler company didn't submit it to compliance engine. Well, that's a 75 dollar fee. It could even be more so.

HARRISON

45:17 It...

JIM

45:18 Would have been nice to know that in advance instead of asking the customer for another check for 75 bucks to not to mention if we don't do it, you're going to have to do it.

HARRISON

45:32 Yeah.

JIM

45:32 You're not gonna wanna do it. I can see where this is gonna, if you're saying it's gonna benefit the service department and make them, you know, more profitable on everything. You're gonna, the company is gonna grow. Somebody's gonna have to baby sit all these people too. You're not gonna come out here and baby sit them. Are you?

HARRISON

45:51 I, you know, I wasn't planning on doing that.

JIM

45:55 Like sounds we were talking about that recently, also that for every seven guys you hire, you're going to have somebody oversee, those seven guys and then, you know, multiply that out. Like I said, the phone rings not stop. We could easily just start gobbling up contracts but it's a headache. It's baby sitting and I don't like doing it anymore.

JIM

46:20 We're old. They told you we're old.

JIM

46:23 You don't have to tell them.

HARRISON

46:23 You aren't old. You aren't old?

JIM

46:27 We're tired.

HARRISON

46:29 Well, I'm tired too. I'm young, but I'm tired. So I'm definitely with you on that one. But yeah, what?

JIM

46:37 We'll get into.

HARRISON

46:37 Some of the compliance engine stuff as well. So to answer your question that you are still going to have to fill out that stuff. But with that being said, you're going to have all this information that you need directly in front of you about like the pictures define.

JIM

46:50 And see things like that. So it is.

HARRISON

46:52 Gonna make it easier. It's unfortunate that we don't have an it.

JIM

46:56 A direct integration with them.

HARRISON

46:58 But again, that's more of a compliance engine that I go.

JIM

47:01 So, if I don't if I don't, if I want my technicians to do all this out in the field like they should be, because at least then the customer sees that you're at their facility, you're still working on the reports and they're gonna almost have to have two laptops one on one showing the report that they formulated with service trade and then have another laptop where they're trying to get on the compliance engine in order to download as well as type in the deficiencies.

--- Forms ends ---

JIM

47:35 They can do that on their tablet.

JIM

47:37 What we don't want them to do is come back to the shop because when they come back to the shop, it seems like they end up hanging out here lolligagging around for three, four hours, we didn't I don't have that in, the price for inspection report.

HARRISON

47:52 Yeah, yeah, no, I.

JIM

47:55 I definitely.

HARRISON

47:56 Understand that. And, you know, so I will say they are using tablets service trades compatible with phones as well. So you can have compliance on a tablet. You can have ServiceTrade on the phone or you could have two separate.

JIM

48:08 Tabs then you go work.

--- Access to information ends ---

HARRISON

48:11 But actually, so what, we kinda touch on some of this stuff before I walk into this work quarter, I wanna touch on this real quickly just to make sure it's making sense. And, you know, so we can understand like the service history and things like that I was talking about. Actually let me take a step back right here.

--- Recurring maintenance ---

HARRISON

48:34 So... if I go right here, what we're looking at right here is going to be, the Bill to address. So we're working at like a Ford dealership, you know, obviously, we're not working at every single four dealership, but maybe there's a few different ones that we might be working on. What service trade is going to be good at. Is separating the location specific information, so we can make it really easy to find. So if I were to click on one of these, it's gonna take me right here to this location page. This is the Ford of stanford where we're working at. You can see any contact information. Where are we billing to? What I was talking about earlier, is any services that we do for them? You'll have to forgive me online. This is just my demo account and I have 116 different services. So it's a little bit sloppy, but I'll go down here and show you what some of these look like. So, you know, we can set up all these different services. Are we doing a sprinkler or quarterly? What sprinkler inspection? Are we doing a monthly alarm inspection? Are we doing an annual backflow? So it's gonna keep track of all that information on this location page. Any old jobs that we've ever done specific to this location?

--- Assets ---

HARRISON

JIM

49:46 You'll have access to this information from the office. If I needed to pull up an old inspection report, I click on the actual job number and it's gonna take me to that work order as well.

JIM

49:56 Okay. Stop right here. I don't like something right here.

HARRISON

50:00 What's that?

JIM

50:01 We don't want our technicians knowing.

--- Access to information ---

JIM

50:03 God, it.

JIM

50:05 Price is charging a customer.

HARRISON

50:07 I...

JIM

50:08 All raises, yeah.

HARRISON

50:10 So, so, I have a good answer to that. I think you'll like the answer. So this right here is from the office. You so obviously you want access that information. We're still in the office. Whenever we go out to the field, you'll see I have pricing on some stuff that's going to be completely permission based.

--- Access to information ends ---

HARRISON

50:27 So, we have a lot of customers that have the same mindset as you. You know, we don't want them to invoice. We don't want them to see pricing and things like that. We can just turn that off for you. So whenever we go up to the field and you see that, just ignore it and know that we can turn that off for you.

--- Assets ---

HARRISON

50:41 Okay? But this right here is from the office. So you'd be able to see any previous jobs, any previous deficiencies, any assets that, we do for them. So, you know, we do have a backflow, we have our extinguishers, we have our suppression, all that information specific to that, any previous quotes. So, Jim, like what you were saying earlier, you know, hey, maybe, you know, we went out there a month ago and they gave me a call and I had no idea about what it is that we did, right? You know, I can pull up any previous quotes or anything like that and you'll have access to all that information in the office, any different contracts or anything?

--- Assets ends ---

HARRISON

51:26 And, and in terms of like all this service history and, you know, all this information, you're gonna see within service train. I mean, what are your thoughts on that?

JIM

51:36 Why like that as far as the office? Because there's a lot of times he'll be out in the field and call me and ask me some of these questions that you have in here. So I can click on a button instead of having to go through Google drive and try and find something?

--- Tech On-site ---

JIM

51:53 The...

JIM

51:54 I can just click...

HARRISON

51:55 On that.

JIM

51:55 Is, is if she calls me and says, what about xyz job? And this? That, and the other is like I didn't do xygjobxyz job. I don't know, I don't know what to tell you, honey, yeah, you have to be able to.

JIM

52:14 In here? Yeah, this is mine is the office right now. He's in the office. Okay? So, did the job?

HARRISON

52:23 Yeah. So, I think to your point, you know, if she has questions about this job that we did, you know, back on the 20 second.

JIM

52:33 Hey, you weren't out there because we can see this other technician was out there. She's not having to call you anymore to ask questions.

--- Tech time tracking ---

JIM

52:39 She can just pull up this old work, right?

JIM

52:41 Here.

JIM

52:43 Is this integrated with T sheets?

JIM

52:47 I don't believe, so, I have its own time clock on it. It does have its own time clock on it so we could get rid of T sheets and this would take the place of T sheets.

--- Tech On-site ---

HARRISON

53:00 But, yeah. So I mean, Trudy could go with.

JIM

53:02 And pull up this.

HARRISON

53:03 This old work order. Maybe she did have questions about how long this technician was on the job. I can see that he was clocked in for 10 minutes. Hey, maybe she had a question about the deficiency.

--- Tech On-site ends ---

HARRISON

53:14 I can see that we have a deficiency. Maybe she needed to pull up the old inspection report or something like that. She's going to have access to all this information. So she's not actually going to have to call you anymore because she's gonna know everything that she needs to know about last time.

--- Tech On-site ---

JIM

53:27 Okay. Cool. Any, any questions?

HARRISON

53:37 The job or the work order so far before we go out, to the field?

JIM

53:43 No, I like that. I like the whole office section.

HARRISON

53:47 Good, good. Very good. Before we go out, I'm not gonna run through all this, but this is the job or the work order. Again, we're still in the office point of view, but really just want to start short here to show you there's nothing that's been done to it, right there's. No, no.

JIM

54:01 Clock events. No.

HARRISON

54:03 No deficiencies. And there's also no attachments. So after I go out and complete it from the field, you'll see how all this stuff is going to be updated in time.

--- *Access to information* ---

HARRISON

54:13 So I'm gonna go out here. This is the same job. This is gonna be, our mobile app. It's going to be compatible with any apple with any android products, tablets, anything like that. You'll see I went ahead and filtered my calendar by today just because I only want to see the jobs that are due today.

--- *Tech On-site* ---

HARRISON

54:30 So I click into it. This is the same job we were just looking at. So there's three different clock events we have on site we have in route and then we have job prep as the technician I'm on the way to the job, I'll go ahead and clock in. I could also if you wanted them to, they could click into here and notify your customer of their expected arrival time. What this is gonna do is it's gonna push over an e-mail notification with a picture of me as well as what talent is supposed to be there just so your customer knows who to expect and then also when to expect them.

JIM

55:03 Does Trudy get a seat in or out?

HARRISON

55:06 I'm sorry, what was that?

JIM

55:07 Does Trudy get the seat in route timing?

HARRISON

55:10 Yeah, she'll be able to see that back in the office.

JIM

55:13 Okay.

HARRISON

55:15 I'll show you what that looks like here in just a second, but quick trip. So I'm gonna go ahead and clock out. It's gonna ask about one o'clock in onsite. So I'll click. Okay, and it's gonna clock me in. No, you'll notice these eight tiles right here. So really with no additional work, you know, your technician is going to be able to see everything they need to do this job, accurately, click in the top left under services. And I'd be able to see that description of work that I'm supposed to be doing while I'm out there. Ignore this estimated pricing. Again. We'll cut that off for you. This is just on my demo account. Any job comments that you wanted your technician to see. Again. The idea is just to help them complete this job a little bit easier.

--- *Access to information* ---

HARRISON

55:56 I could also add comments from the technician point of view as well. This is my job comment... and this is going to get sent back into the office in real time. Any of those contacts that you wanted them to see. So, you know, cell phone number, e-mail, address, maybe they're walking out of the.

--- *Quote templates* ---

JIM

56:15 How does all that get in there? Who types in all that information for what needs to be done on the job?

HARRISON

56:23 The service information right here. Yeah. So what I would recommend what I do for mine is I would actually create some service templates. So whenever you're getting set up with service trade, you know, just kinda have a standard verbiage standard parts, labor, and items that go along with this particular type of work that we're doing. And then you can actually load all that stuff in from a template. So you don't have to manually type it out.

JIM

56:50 So if you don't have it in a template, like if Jim sets up a job, he has to go in and type in what he wants done on that job, if it's not part of the template.

HARRISON

57:02 So your options would either be to have a template or if you wanted to take verbiage from a previous job and copy and paste it, you could do that or you could go in and add your verbiage as well. But again, what I would recommend is making the template, you can go in and edit this information as well. But it's gonna make it a lot easier to kinda have that standard verbiage. I'm sure you already probably have that standard verbiage for your, you know, for your work orders now.

JIM

57:30 Yeah, I've seen some competition, some of the competitions inspection reports where they actually have the code reference next to the, each item as well.

--- *Assets* ---

JIM

57:44 I really do like that part. That way. The customer can see that it is a code. And if they had, if they wanted to check themselves, they could type that in, and look it up, you know.

HARRISON

57:56 Yep. No, absolutely. And if that's the detail level that you won't again, I would, it is gonna take a little bit of work at first kind of building a few of these out. But again, just like everything within sir Richard, whenever you have it in there the first time, it's always gonna be there and you won't really have to, you know, do that anymore. But yeah. So a lot of that's gonna come in from templates also out in the field, we have the asset or the piece of equipment that we're working on for this particular job as a technician. If I wanted some more information about this piece of equipment, I could click into it and I'd be able to see all that information that's visible to you guys in the office as well, you know, just so you know, Jim or whoever is out in the field can be more informed about this. So, you know, location number, type size, make model serial number, anything like that. If I wanted some more information about this particular piece of equipment, you know, I could click right here into deficiencies, and maybe we found a efficiency last time we were out here, you know, I could click into it. I can see a description of that work. I could pull up any old attachments or anything like that. So, you know, while I'm out in the field, I'm informed about what happened last time and I know what's going on. I could also see any previous service history as well. So these are just some jobs I cancelled, but maybe I wanted to pull up our most recently completed job, right? You know, I could click into here. I could see any attachments, you know, any before and after pictures, that old inspection report, anything like that. I have access to this, you know, from the technician point of view, just wanna make their jobs easier. So all that information, do you have a question, Jim?

--- *Forms* ---

JIM

59:40 Yeah. How about downloading the customers last inspection report before you did your report?

HARRISON

59:47 Yes. So what you can do for that? And I actually don't know what job I have with the filled out inspection report. But let's just say for example... this one right here has one. Okay. So I don't actually have an inspection report for it. But if I wanted to go to my last job and I could click on the actual inspection report, it's gonna be through a program called a date acrobat. And I could actually just go in, click on it and download that and then make any changes that I wanted to on this new inspection report. They can absolutely do that.

JIM

1:00:26 I was just thinking it'd be nice to have the previous years inspection report prior to you. I mean, there's a lot of inspection reports where... the previous company didn't Inspect certain things. Maybe they just inspected common areas whereas the customer wants their insurance company or something wants you to go inside each unit on a multifamily apartment or something, and check inside the unit.

--- *Tech On-site* ---

HARRISON

1:00:54 Right. Yeah. So, you know, again, if we filled it out last time from the mobile app, I could actually click into it from here and make my changes to it. Or another option as well is if you have access to that in the office before they go out, you know, you can just add this as an attachment as like a PDF or something like that, attach this to the work order from the office.

--- *Tech On-site ends* ---

HARRISON

1:01:16 And then whenever I actually go out to the field, I would have access to that information as well. Does, does that sound like something that would work for you?

JIM

1:01:27 Yeah. Definitely. Starting. They're talking about out here requiring the reports to be on site in a designated red document box is just kinda like your alarm people have right now.

--- *Deficiencies* ---

HARRISON

1:01:43 Okay. Gotcha. Okay. That makes sense. Cool. Last thing I wanted to show you real quick for, I get off this tangent right here is the deficiency tab. Again, this is a really big thing for us. This is a big way that service trade is going to be a revenue generating source. So as the technician, you know, I found find an efficiency, I can click into my deficiencies and I'd be able to see any previous deficiencies that have ever been discovered at this location as well as making it super simple to log something new that I found. I'll just click down here at the bottom had deficiency. It's gonna ask for a description. You know, we'll just say that we found a coroded head. I don't really have to go too far in depth with that because we have the ability

to add attachments to it as well. So if I wanted to take a picture of my coroded head, I could add that... I could take a video. I could even record an audio mim, you know, hey, I'm out here at this job site, I found a created sprinkler head. These are my recommendations about what we should do to fix this, right? So go ahead and save that before I go ahead and completely log this deficiency. It's gonna ask a few more questions of us just to make sure everything's as accurate as possible. What's the severity of it? I'm gonna say it's inoperable. It's not functioning, select the asset or the piece of equipment that we're working on. So we can keep building up that service history for next time. So I'll tie it back to my sprinkler. I'll mark it as a new deficiency. And then I'll go ahead and save this. Last thing I'll say on this is any time I log one of these deficiencies, add these attachments, anything like that. The office is going to be notified in real time that something was found... but just wanted to take a brief pause and just grab your thoughts on this mobile app so far.

--- Deficiencies ends ---

JIM

1:03:39 Looks good.

HARRISON

1:03:41 Okay... cool. Jim. And I know you'd be one of the main ones using it out in the field. I mean, in terms of ease of use, what are your thoughts?

JIM

1:03:51 It seems like it'd be really easy.

HARRISON

1:03:56 Awesome. Well, cool. Well, definitely glad to hear that. Hey, I know I'm at the top of the hour.

--- Purchase decision ---

HARRISON

1:04:03 So I wanna be respectful of both times. Do you guys have a hard cut off point or do you want to keep going?

JIM

1:04:12 No, we can keep going.

HARRISON

1:04:14 Okay, perfect. I will, I'll try to keep everything brief from here. Kind of, my next plan was I'll walk you through the inspection reports real quick.

--- Forms ---

HARRISON

1:04:23 And then I want to show you how all this information flows back into the office. So we can invoice and quote out directly from there... really quickly, you know, just as inspection reports. If I click right here under view more details... and then up in the top right under actions, I can click on download blank paperwork. You'll notice that again, this is my demo account. I send over a few inspection reports over here to me. What service trainer is going to be able to do is send over the correct inspection report in reference to what kind of job we're doing. So if we're doing a wet sprinkler inspection, it's gonna send over your wet sprinkler report. If we're doing backflow, it's gonna send back forever et cetera. Et cetera. If I click up it generate... sorry, I click back on accident. Give me one second, few more details... on like paperwork... generate.

HARRISON

1:05:26 This is kinda just a mock inspection report that I have on my demo account. But a couple of things to notice is that a lot of this information that we already have within service trade is gonna go ahead and pre populate over to this report. So you're not going to have to spend time, you know, in putting information that we already have. So, you know, property information, customer information, any equipment information that we already have, it's gonna go ahead and actually send it over to this inspection report. So all we have to do from here is, you know, check off any boxes, add any notes, you know, any dates, anything like that. We can add this directly to this inspection report and it's going to upload it back into service trade for you.

JIM

1:06:12 You. So are you saying?

JIM

1:06:14 You don't have templates for?

JIM

1:06:16 Wet sprinkler inspection, right? Sprinkler inspection bird?

HARRISON

1:06:23 Yeah. So, yeah, we absolutely do. So, our inspection reports are up to the standards of in F, pa. So, we have a pretty detailed library of all of those. I can send those over to you. If that's something that you wanted to use, you could certainly use it, or if you have ones that, you know, you just like we can definitely just take the reports that you currently have and upload them into service.

JIM

1:06:48 Well, I'd like to see it before, or in order to figure out if we wanna use that template that's for sure.

HARRISON

1:06:57 Yeah. Let me, let me take a note real quick. So which forms would you be looking for? I'll send?

JIM

1:07:05 We use the wet and the dry, the pre action, we use fire hydro, annual inspections. We use fire pump. We use the stand pipe. I'm just, we use them all really. I mean extinguishers, but I don't think they really see 13. We get a lot of customers. Now, the very expensive houses they, prior to selling, they call us realtors call us in order to do an inspection on the, Inspect the sprinkler system prior to the sale of the house 13 are does not require a annual inspection, but sure, it would be nice to have some sort of template.

--- Pricing ---

HARRISON

1:07:53 I don't know if we have a 13 or I'm gonna look that when not, but I...

JIM

1:07:58 Not in the body of 13 or 13 or 13. D is not in the body of 13 or 13. So they do in pa 25 is not considered part of the.

HARRISON

1:08:10 Okay.

JIM

1:08:11 For 13.

--- Forms ---

JIM

1:08:12 So, but there should be some sort of a template... that the text could use to go out... to do their inspection at that point in time. I mean, if it has a pump and a tank, you would think you would be pulling something off your fire pump. Yeah.

HARRISON

1:08:34 And yeah, it could be one of those things too. Let me actually just take a look at our pump form and, it might be able to kind of knock both of those out to be completely honest with you. It might have the information that you need for it.

--- Forms ends ---

HARRISON

1:08:49 I just, I don't really have like the cosmetics of it completely minimized on what's on it. But yeah, what I'm gonna do is whenever we get off of this, I'm just gonna shoot you over an e-mail with a copy of these forms and you can just kinda let me know your thoughts on them, all right?

--- Tech On-site ---

HARRISON

1:09:09 So, yeah, you can just upload that last question I had from here is, you know, do you and your technicians, do you want them collecting signatures out in the field?

JIM

1:09:19 I would prefer they do. Now, sometimes there's not people there to get a signature, right? I mean, I would prefer legality wise, if you don't have a signature, your customer is always gonna be, right?

--- Tech On-site ends ---

JIM

1:09:34 Isn't that what your e-mail surfis? As?

JIM

1:09:38 Yeah, if you have, if you had an e-mail but if somebody calls you on the phone, you nothing.

JIM

1:09:45 Yeah. So if we, if we're doing stuff in the mountains on rental homes or something like that for a customer, you don't really see your customer.

--- Tech On-site ---

JIM

1:09:56 You don't really talk to your customer. They'll give you the code to the garage and have added. So... yeah, that's it could be a problem, but.

HARRISON

1:10:08 So, I'll show you something whenever we get back into the office, what we call it, our service link is kind of our proof of work for those customers that are not usually on site if you did want to collect the signature, though if you know, they are available, we can create what we call it work acknowledgement right here. So I click into that, select the contact that I'm speaking with. So I have Trudy, and then from here, I mean he can just review this information. So, you know, hey, these are the services that I completed. These are the parts in items that were used to complete it. You know, hey here's, my deficiency here's. My comment right here underneath this here's, my filled out inspection report. If you want to take a look at that, from there, you just have your terms and conditions, they can acknowledge that the work's been done and then they could just confirm and sign directly from there and it's gonna e-mail over a copy, to the customer with that filled out with that signature from the onsite contact.

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

JIM

1:11:10 Terms and conditions. Is that a standard?

HARRISON

1:11:14 So, I believe the terms and conditions, I wanna say they're your terms and conditions. I think it's probably one of those things like we kinda have a standard thing for it, but you can go in and make changes and stuff to it if you want to.

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

JIM

1:11:28 Yeah. Last time I was in at a lawsuit, one of the attorneys said that our contract should never say that we would pay more than what the contract amount is. So I mean, that way you have it in writing that they can only see you for whatever the amount of the.

--- *Tech On-site* ---

HARRISON

1:11:48 X amount. Yeah. And that's something that you would put in there... but cool for time purposes, I'm just gonna move along then we're gonna go ahead and clock out whenever I clock out. It's gonna ask me to mark off all my completed services just as a final checklist, you know, make sure I did everything I was supposed to. But I did, we also notice we can set up a task list if that's something that you want them to do as well. This could be something good like you guys were mentioning about holding your technicians actually accountable. So if you want to require them to attach a photo or require them to leave a comment or something like that, it actually won't let them clock out until they do that, but I've already done all that stuff. So I'll just go ahead and finish and clock out.

JIM

1:12:34 Was just gonna say if they didn't get any pictures or they didn't do what they were supposed to do, they're gonna drive home, well.

HARRISON

1:12:44 So, I understand what you're saying. I didn't get that option because I'd already included something. But like for example, if I didn't have a picture, it would kinda prompt another question like kinda asking why they didn't and then they just click on that. But really it's one of those things just to kinda hold your technicians account. Yeah, make sure they're actually doing the stuff you want them to do... but cool. So back in the office, if I refresh this.

HARRISON

1:13:19 So again, all this information got sent back into the office in real time. So my different clock events, you can see that I was on the way to the job for about a minute. I spent 17 minutes on site. It's also giving you a notification about 32 Miles away. Whenever I'm clocking in and clocking out, you might want to check on that. Maybe they're you know, clocking in for mcdonalds before they actually get to the site, my job comments got sent back over... my attachments. So that signature from

the onsite contact, if I were to gone through and actually filled out that inspection report, it would live right here as well.

--- *Deficiencies* ---

HARRISON

1:13:55 But also these deficiencies got sent back in real time. So from the office, if I were to click on this.

JIM

1:14:09 What this is?

HARRISON

1:14:09 Gonna do is it's gonna, send me to my deficiency board. What this deficiency board is gonna show us is, you know, what was found, what location, how severe, what technician found it? But it's also going to include all that information from the field. So, my audio memo, my picture, as well as any related deficiencies. So we're making the right recommendations to our customers. You know, maybe the last couple of times we've gone out there, we found this problem. We can keep putting a mandate on it.

--- *Quote templates* ---

HARRISON

1:14:38 Maybe it's time for us to actually go ahead and replace this. But from here, if you wanted to go ahead and quote it out, we'll just click right here, add the quote set expiration, they don't it if we want to, we'll give them to, till the end of the month to do it. And then we'll just go ahead and create this quote.

--- *Deficiencies* ---

JIM

1:14:57 Okay. So I have a question on that automatically. If you have a corroted head, all inspections by code are done from ground level head that's up in the up in the ceiling and you can't tell what it is. The guys are going to have to get a ladder and actually go up, and take a picture of the head and then call to get a quote from your supplier and availability as well?

--- *Quote templates* ---

HARRISON

1:15:26 Yeah.

JIM

1:15:27 How's other companies doing that as far as you can't, just quote a sprinkler head at 15 bucks everywhere you go because, their prices change dramatically

sometimes?

HARRISON

1:15:40 Yeah. So what I would say to that? Let me go back real quick.

JIM

1:15:47 Do you tell your customer you need another service call to come out and field survey?

--- Quote templates ends ---

HARRISON

1:15:56 Yeah, I mean, I would say that would be an option as well. I think something kind of important to keep in mind on this is that, you know, we don't necessarily have to send this quote out immediately until we figure out this information. You know... really kinda the idea with this actually, let me show you this right here and it might make a little bit more sense what I'm talking about.

--- Deficiencies ---

HARRISON

1:16:23 So let me go ahead and create this quote. And I think I'll kinda answer your question as we go through this here. So really the idea, you know, corroted head. The idea is that our technician, you know, from the field through the pictures through the notes is going to be able to tell us what kind of head it is. And we can include this on the quote. So we're going to be informed back in the office. So, you know, whatever kind it is. But whenever we get this quote sent or whenever we get this quote created again, all this information from the field. So our picture, our audio memo as well.

--- Quote templates ---

HARRISON

1:16:58 So efficiency is gonna flow really easily from the field to the office and into our customer. If it's a problem that you're running into regularly. Again, I would recommend building out some quote templates for. So let's just say for this example, right here, for our core sprinkler head, we can go ahead and load this verbiage. And so our verbiage or parts laboring items that go along with it. So this is gonna make it easy to actually build out this quote. If we need to go in and change any of this stuff, we can absolutely do that. So maybe it's not the standard sprinkler head.

--- ST app contracts and pricing ---

HARRISON

1:17:33 We needed to change this to something else. Let's just say it's this one right here. We're going to be able to keep track of like all, the unit cost, our unit price for this as well. So we can kind of update this as we go along. Does, does that answer your question?

JIM

1:17:49 Yes, definitely.

HARRISON

1:17:51 Okay, perfect. On quite sure if I was explaining that, right? Or not.

JIM

1:17:56 I like the quote description that's I like that as well.

HARRISON

1:18:00 Okay. Cool. Glad to hear that from here. Super simple though. We're just gonna click send a customer again, you have full editing capability on this. So, you know, if you wanted to change this verb which we can absolutely do that. Maybe we wanted to include the picture, but we don't want to include the audio memo on it. There's no telling what our technician was saying. We don't want our customer to hear that we'll toggle that off, still be visible to you in the office, just not visible to your customer. From here, you select the contact that you want to send it to, and we'll just go ahead and send it over. So, Trudy, I actually emailed that over to you. You too can review that internally, but I'm gonna pull this up on my end. This is what a quote is gonna look like from your customers point of view. So your guys is logo top left hand corner, your description of work. I have mine set to grand total. You can spell out that if you want to our picture, our terms and conditions, and then probably my favorite part is gonna be this big green approve button, top right hand corner. It's gonna give your customers the ability to approve this quote directly from the e-mail that we're sending out. They can just enter their po number if they have one confirm they've read the terms and conditions, and then go ahead and approve this quote.

HARRISON

1:19:22 How, how do you think your customers would respond to receiving quotes like this?

JIM

1:19:27 No, they would love that. Okay compared to what we give them now, but yeah, I see how I see how that would exponentially get more revenue moving forward, with that just by having that formatted like you have it right there. But... I'm more concerned about the compliance engine because then you also have to go back in each time you make a repair like this.

JIM

1:20:00 Let's say the customer can afford to do all the deficiencies on the list and the only wants to replace the loaded head or the painted head and a couple add some

heads in the head box or something like that. Then we gotta go back on the compliance engine again and then send them a picture showing that we replace the loaded head and a picture showing the head box with the new heads in it.

--- Deficiencies ends ---

JIM

1:20:28 And it just seems like there's another step. It just keeps going on and on. And like I said, it's... if they don't do it out in the field, they're gonna come to the shop and then they lolligagging around here or we're just gonna have to have a baby sitter to baby set.

--- Forms ---

JIM

1:20:49 Let me...

JIM

1:20:50 We kinda wanna go travel once in a while, you know?

HARRISON

1:20:56 I mean, I guess my question for you then is...

JIM

1:21:01 Cause I mean, you're right? It is going to be worth to.

HARRISON

1:21:03 Into service trade. It is going to be more goes into compliance engine, but I mean, the ability for them to kind of go ahead and log this information into service trade. Do you think that would be easier for them to upload that into compliance engine as well?

--- Forms ends ---

JIM

1:21:18 It definitely would be. So, I mean, this isn't really, this doesn't really show what they're doing like this. Like let's give an example of yesterday. I assigned the new guy to do something. And... my truck broke down when I went to go get some materials and I called Trudy and she's like, well, do you want Rob to go come out and is like, I thought Rob was on a job, right? But I mean, does it keep track of his time? Like?

JIM

1:21:54 Yeah. What if he's sitting in the office? Like yesterday morning? He hasn't billed anything in the three weeks he's been here. He hasn't done any of his reports. He hadn't built anything. So yesterday morning, I made him sit down. I gave him a

list of everything because I have the job number showing what jobs we did that haven't been built. So I gave him a list of those and I said I need you to sit down. I need you to do your reports. I need you to do an invoice telling me what you want me to charge them. And if you need to give them an estimate, I need you to get the estimates done.

--- Tech time tracking ---

JIM

1:22:28 And then I want you to go set it up on my front desk. So he did that. It took him probably an hour and a half two hours.

JIM

1:22:36 And that's labor hours that should have been applied to each one.

JIM

1:22:41 Those jobs that.

JIM

1:22:42 He was working on.

JIM

1:22:44 But this with David, be doing that out in the field while he's on the job.

--- Access to information ---

HARRISON

1:22:50 Correct that. That's that's the idea for this. You know, obviously, I will say to, you know, the office point of view kinda trumps what we do out in the field. And what I mean by that is anything we do out in the field, the office can kinda come back and edit it as well.

--- Tech time tracking ---

HARRISON

1:23:09 So, you know, here's my clock events right here. This is what, I logged from the field. So I was in route for a minute. I was on site for a minute if you needed to go in and change any of the stuff, you know, you could go in and change these times directly from here. You know, anything like that. So you definitely do have, the editing ability from the office, if that makes sense.

JIM

1:23:32 So I could add an hour's worth of office time doing his paperwork. If you had to come to the office to do something.

HARRISON

1:23:40 Correct.

JIM

1:23:41 That to the job?

HARRISON

1:23:43 Yeah, I would just click right here, add clock events, what technician was it is Harrison? And then you have like all the clock in time, clock out time.

--- Tech On-site ---

HARRISON

1:23:54 You know, what appointment does it belong to? So we'll tie it back to here. And then it's going to go ahead and create another clock event for us. So yeah, you could definitely do that.

JIM

1:24:07 So I'm in this has GPS on it.

HARRISON

1:24:12 So, I will say, so I wanna make myself clear whenever I say we're not a GPS tracking software. And what I mean by that is we're not gonna keep track of how fast their trucks going. We're not going to provide you with, you know, constant updates on, you know, where are they at this time? And the reason why is because they would just kill their phone battery having the service trade. And this, what we can do is we can take GPS screenshots of where they are whenever they do clock in and out. So, for example, you see right here that I'm 31 Miles away. Whenever I clocked in, let me see where he's actually at. So hey, well, he actually clocked in and he was at the gas station 32 Miles away. Whenever he clocked in, he's not actually at this job site. So it's gonna connect with Google maps, but it is not gonna provide you like constant, you know, on the road updates for you, right? Yeah.

HARRISON

1:25:09 Yeah. So actually, so kind of shifting gets guarantee there's like two more things I want to show you with this quote.

--- Quoting ---

HARRISON

1:25:16 And, I think it will kinda answer some of your questions as well. But let's just say the customer went ahead and approve this quote, right? So first thing is we can see all this quote history. So any time someone's viewed a quote will be able to keep track of that, you know, maybe we sent out a quote a week ago. It's been viewed 15 times. It hasn't been approved yet might want to follow up on that and, you know, make sure everything's okay. But it's also going to create these two new tabs right

here. So if I wanted to create a job from this quote, I could take this quote and I could push it to a new work order or if I wanted to add it to an existing job... what this is gonna do is it's gonna pull up any open existing jobs at this location that we're working at.

--- Deficiencies ---

HARRISON

1:26:00 And the idea is just to drive more revenue with every visit, right? So, you know, maybe we have to fix this deficiency that we found. But we're also going back out there next week for, you know, a backflow inspection, let's go ahead and kill two birds with one stone and knock on both out. While while we're out there. Any questions on that?

--- Recurring maintenance ---

JIM

1:26:23 And that's since you brought that up, it was, it's almost, you know, how you, at the very first page you showed us where you had outstanding or inspections coming up that aren't scheduled. If you had locations, of the inspections, you could use that same type of theory and get a couple in that same general area that you were going to go do one that is scheduled and then give your client a call and say, I'm in the area. Would it be okay to come by in an hour or two and do your inspection?

--- Dispatch ---

HARRISON

1:27:02 Absolutely. That's a great idea for that and I know them over my time. So not to get too much in the weeds with this, but we also have a map based scheduler as well. So it's gonna kinda pick out, you know, hey, we have these jobs that are coming up next week, you know, we're doing three jobs next Tuesday in this town. I also see that, you know, you have your quarterly inspection scheduled for this month, some time. Can we go ahead and do that while we're in town next week? So we have a map based scheduler a scheduler as well to kinda make that more efficient for you. But again, I'll send you some information about that.

--- Dispatch ends ---

HARRISON

1:27:38 I know I'm over my time. I don't wanna, you know, hold you up too much longer. Last thing I wanted to show and I'll knock this out super quick. But Trudy, I know this was a big thing for you so I think you might want to see this.

--- Tech On-site ---

HARRISON

1:27:52 So, you know, we complete or we send out our quote, we created a new job from it. Really the last thing we need to do now is just go ahead and actually invoice

out the job. So again, this information is gonna live right here. You can click into it and review it, but it's gonna take you to this work order. So this is the same work order that we've been working on today. What you can do is we'll just go ahead and click right here, complete job and we'll complete this job and create this invoice right here. So I create an invoice from these items.

HARRISON

1:28:31 Now, the cool thing about this is all those parts labor and items from our work order are gonna flow over in real time to the invoice. There's not gonna be any double work on that end. But again, like I was saying at the beginning, you know, completing the job is really just getting your set of eyes on it, making sure everything looks okay for you before we actually send it over to the customer.

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

HARRISON

1:28:51 So, maybe, you know, I needed to go in here and change my pricing on something I could do that add an item at a tax rate. I can even change the detail level for my customers. Maybe I just wanted a grand total only so I can go in and save that. From here. We'll just click send invoice link.

HARRISON

1:29:16 Preview of this right here. This is what the invoice is gonna look like from your customers point of view. So, again, your guys is logo, top left hand corner. I have grand total online. You can spell that out. You'll notice again, a big green pay nail button, top right hand corner.

--- Invoicing ---

HARRISON

1:29:34 It's gonna give them the ability to pay directly from this invoice link, you know, in their po number, acknowledged terms and conditions, pay with a credit card pay with an AC H directly from here.

JIM

1:29:46 Yeah. I know the Christian.

HARRISON

1:29:48 Our...

JIM

1:29:49 We have our own job number list that has been going for years and years. Am I able to change that invoice number to my job number?

HARRISON

1:30:03 Yes, you should be able to let me... yes, you can.

JIM

1:30:11 Check. Okay. Yes. Okay. Cause we have that issue now because Jim will send out to his contractor one that says invoice and he just uses the date and then he hands it to me. I give it the actual job number and we get the customer going. We got two invoices and it's like now it's the same invoice.

HARRISON

1:30:35 Yeah. I, it's...

JIM

1:30:37 Confusing. I'm sorry.

JIM

1:30:38 Yeah.

HARRISON

1:30:40 Yeah. So you can go in and change that?

JIM

1:30:43 And then I can print this and I can put it into my Quickbooks.

HARRISON

1:30:48 Yes, we can do that. You can do that or you'll notice right here this into accounting system. We do have an integration with Quickbooks. If you wanted to take this and submit it to Quickbooks, you can absolutely do that. What a lot of our customers are doing is they'll have their Quickbooks kinda synced up to, you know, whatever time range. So maybe every hour every two hours, it just kinda runs in the background, takes this information and pushes it over to your Quickbooks for you.

--- Invoicing ends ---

HARRISON

1:31:19 Okay. But yeah, so we do have that integration. Last thing I wanted to show you on this is you'll notice this blue service details tab. Like you guys were saying earlier, you know, a lot of times that main point of contact is not going to be on site.

--- Tech On-site ---

HARRISON

1:31:36 So we can attach that to this as well. And really what this is just showing the proof of our work. So, you know, what appointments do we compete? What services do we complete? What parts, what labor, what items will use? Any comments? You wanted the customer to see?

--- Tech On-site ends ---

HARRISON

1:31:52 Any attachments. So maybe before and after or maybe that filled out inspection report, something like that. And then of course, the efficiencies that we found. And really the whole idea with this is, you know, hopefully from the customers point of view, you know, now I'm focused less on your pricing. I'm focused more on the good work that you guys did for now.

HARRISON

1:32:19 That's kinda, that was kinda, my workflow and my whole kinda just of what I wanted to show you to today. Is there anything else that I didn't touch on or any other questions that you have that I could address?

JIM

1:32:34 So, I think you hit it all.

JIM

1:32:36 Thank you did really good.

--- Customer engagement ---

HARRISON

1:32:38 I appreciate that, Jim. Yeah. Well, cool. Well, I mean, the main goals I was looking for was just, you know, increase communication from, you know, office, to the technician and vice versa and, you know, kind of reducing the turnaround time on this quoting and invoicing. I mean, the service trade seems like it could be a good fit for that.

--- Purchase decision ---

JIM

1:32:59 Yeah. If the guys will use it and use it correctly, it's I think it'll flow really nice.

HARRISON

1:33:05 Okay. Well, good. Well, yeah, definitely happy to hear that. Okay. Then, well, I mean, in terms of next steps, you know, what you need from my end. I mean, in terms of evaluations and things like this, I mean, what's typically the next steps for this?

--- Purchase decision ends ---

JIM

1:33:24 Well, I would say we wanna try to check out that building reports software as well just to see how theirs looks, how their integrates as well... but...

JIM

1:33:39 He's actually supposed to call me tomorrow, I think to set up an appointment.

HARRISON

1:33:44 Okay. And, was it building reports or build?

--- Forms ---

JIM

1:33:47 Building up?

HARRISON

1:33:50 Okay. I keep.

JIM

1:33:51 Seeing all these little stickers when I go to do inspections that you use a barcode to scan them. And sometimes I see like 18 stickers on one little piece of pipe and I'm thinking I bet they're just scanning each one and not doing the inspection.

--- Forms ends ---

HARRISON

1:34:10 They, they probably are.

JIM

1:34:15 But you can, as you can see, the time stamps every time they can on their inspection report. It's like you didn't trip that drive out.

JIM

1:34:30 Yeah. So let us let's you know, he likes to compare things.

JIM

1:34:35 You didn't get the price. We didn't get your price.

--- Pricing ---

HARRISON

1:34:38 Yeah, you.

JIM

1:34:39 Want to run through pricing real quick.

HARRISON

1:34:42 Let's do it.

HARRISON

1:34:48 So this is going to be our pricing right here. This is on our website, but we have three different tiers. We have our select, we have our premium, we have our enterprise. I'm just gonna tell you everything that we walkthrough today is part of our select package with four technicians that's the one I would recommend. So, the way we Bill is based solely on the number of users in the field. Anyone in the office can use it for free. It does cover up to five technicians, 89 dollars a month per technician billed annually. It's gonna come out to 53 40. We are gonna charge a one time onboarding fee for the work that we're gonna do to get you up and running. That's gonna be 1,750. So, your first year, you're looking at about seven grand every year. After that, about 53 40. Only other fee that comes to my mind that I wanna make you aware of would be those Inspect those inspection reports. If you wanna use ours. I'll send those over to you but it would be a one time fee of 149 dollars per fee per form to get those uploaded.

--- Pricing ends ---

HARRISON

1:36:02 And I can, I'll send you over a quote as well, kind of spelling it out a little clear. So it's not written on an app in or anything like that. But after we get off of this today, I'll type up a quote for you and send it.

JIM

1:36:15 Okay, perfect. Perfect.

HARRISON

1:36:18 Well, sounds like a plan guys. Good luck with that meeting. He said he's calling tomorrow. Would it make sense for me to kinda reach out maybe like mid, about this time next week or so?

JIM

1:36:27 Yep, mid next week would work.

HARRISON

1:36:30 Okay. Sounds like a plan then.

JIM

1:36:32 All right.

JIM

1:36:34 Thank you.

HARRISON

1:36:35 Well, thank you guys. All. Have a good.

JIM

1:36:36 One. You too.

HARRISON

1:36:38 All right. Bye bye.

The End