



Followup ServiceTrade Demo with Cook Mechanical Inc

Alec Ashby with Cook Mechanical Inc
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Participants

SERVICETRADE

Alec Ashby
Territory Manager

OTHER

TRAVIS DUDLEY

Travis

Jody Vowell

Topics

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Transcript

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

--- Call Setup ---

ALEC

0:00 All right. Let's see if we can get this to work.

ALEC

0:07 Not connect. Okay?

TRAVIS

0:14 Can you hear me?

ALEC

0:15 Yep. I can now. Can you hear me?

TRAVIS

0:17 Yeah, yeah, we're good.

ALEC

0:18 We figured it out. Hey, TRAVIS, how are you doing today, man?

TRAVIS

0:22 Good, good. How about yourself?

ALEC

0:25 Doing good. It's been a busy day for you with you guys being down a dispatcher and Jody out there fishing the.

TRAVIS

0:32 Yeah, it's been a busy couple of months now. We, we're still trying to fill that position, but.

ALEC

0:40 Yeah.

TRAVIS

0:41 In the right person?

ALEC

0:43 Right. Yeah, no, you're totally right. I'm sure you could just fail it tomorrow if you wanted to, but you don't wanna get one in and they're out the next month.

TRAVIS

0:51 Yeah.

ALEC

0:52 Sometimes.

TRAVIS

0:52 It's just easier to do it myself too. It's it's cheaper anyway.

ALEC

0:57 Right. Yeah, 100 percent. Okay, cool. Well, you know, I'm happy. It seems to be slowing down a bit. You, know I actually spoke to someone in Texas the other day. He's at heritage air. I don't know if you're familiar with them, but, yeah, there's so many of them, but he said it's like 90 is cool for you guys. So, like if it's 90, it's going down, but here in North Carolina, it's more like humid than anything. It's actually pulled down quite a bit. So all interesting stuff for sure.

TRAVIS

1:26 But...

ALEC

1:27 Anyways, I know it's been a little bit since I was out for a bit. And then the, you know, some stuff came up last week. So, it's been about, you know, three weeks.

TRAVIS

1:34 Yeah.

ALEC

1:35 So, like, where are you guys are at? I know you're looking at a lot of different platforms. Like have you guys narrowed it down at all or you kinda like what?

TRAVIS

1:44 I think, yeah, no, I think we're between you and hold on, close this door real quick.

ALEC

1:50 You're good. Take your time in.

--- Call Setup ends ---

TRAVIS

2:00 Not that there's anybody here. I think just empty. Yeah, BuildOps in service trade. I believe we're, the front runners. I think BuildOps. I think, we even missed out on their second half of their deal. I don't think we even continue that. So if that's says something about our interest level, and then...

ALEC

2:33 Gotcha. Yeah, makes sense. And I know too, you know, you guys are, you know, everyone in a perfect world, everyone would, you know, do a lot of due diligence and take, you know, three to five meetings with every software vendor, but practically you can't always do that.

TRAVIS

2:48 Right. I got.

ALEC

2:49 That. And, and I feel like on the last meeting, it went pretty well overall, but I felt like it like maybe it was just too much information or I showed you too much like what were kind of things you really want? I know you sent me that e-mail, it seems like billing and is kind of what you wanna see?

TRAVIS

3:05 Yeah, where?

ALEC

3:06 Where kind of, I guess, what do you like about? What do you guys like about service trade? What are you kind of uncertain about? What are you kind of out with that?

TRAVIS

3:14 The, the ability for me is the ability, to dispatch a technician to work order.

ALEC

3:22 Okay.

TRAVIS

3:22 Everything be contained in that and then build from that. So it's not a whole lot of transfer, of information across outlook or Computerease, or whatever other software, text messages and phone calls. It can be conveyed in a work order dispatched out. And I think everything checks out there. I think what we wanted to know is where how it translates into billing and how it integrates into Computerease.

ALEC

4:00 Yeah, yeah, absolutely. So, I know we touched on this a little bit last time but we do have an integration with computer is, you know, delta, you know, I know they're huge in Texas. They actually chose us as, you know, because they recognize that FieldEase is not robust enough for a scaleable service department.

TRAVIS

4:19 Right. The...

ALEC

4:20 Detach chose us as the vendor of choice. So we do have an integration with them now since we, since Computerease doesn't have an open API, which is just a fancy way of saying it doesn't interact with other softwares as well as like a Sage intact, or like a NetSuite, but we integrate with them. I believe Jody was more open to the idea of growing into that like going with service trade without an integration.

TRAVIS

4:48 Yeah.

ALEC

4:49 And then maybe growing into that, assuming, you know, you go live with us, you see value, it's like, okay, we see them as a long term partner.

--- Pricing ---

ALEC

4:56 Now, we'll spend more money on the integration. But if we do want to discuss that for whatever reason or if you guys would, we do have companies that do purchase it from the jump, it just costs 12,000 in the first year and 6,000 in the second.

TRAVIS

5:09 Right.

ALEC

5:11 Typically, you know, companies when they get up to 12 to 15 text that's when they kind of more start considering that especially considering you guys don't have one now.

TRAVIS

5:21 Right, right. How does, how does that look without the integration? How does that, how does that translate? Is it still manually input it into computers?

ALEC

5:32 Yep. So it'll be manual. So there's a couple of ways to do it. What most companies do is they'll run an invoice report either at the end of the day, end of the week, they'll take that key financial information and then just manually put it into Computerease.

TRAVIS

5:46 Yeah.

ALEC

5:47 Now, if you wanted the integration, basically what you'd ask yourself is the time that I'm spending doing that, is that worth six K annually. You know what I mean?

TRAVIS

5:55 Yeah.

ALEC

5:56 And usually, if you're not, if you're not at 12 to 15 text, so that higher tech count. Usually it's not worth it. But some companies are like, we just don't want to deal with this, we're willing to pay for it. We can do it. So if it's something you guys wanna pay for, we can definitely, you know, explore it and I can, you know, explain it at a high level, but it's you know, it seemed like just based on the last conversation, Jody was more open to growing into that instead of starting out with that can definitely, you know, if he wants to do that, we can definitely, we open up that conversation because the thing about BuildOps to my knowledge, I'm not exactly sure, but I don't think BuildOps has an integration.

TRAVIS

6:37 And with...

ALEC

6:37 Computer is to my knowledge and I don't even if they claim they do, I don't know how many are actually using it because we actually have not a ton but quite a few customers using it because around 40 percent of our customers actually keep service trade separate for their accounting system for whatever reason. So just kinda all depends on what you guys wanna do and what your budget looks like for sure.

TRAVIS

6:58 Yeah. I think for me, you know, since it's just us girls here. If, if we're not gonna integrate it into our billing and accounting software, then I don't see how this justifies, the cost if we're just looking to use this as electronic data storage maybe... but I'm gonna have that's my pitch to him. Is that if we don't integrate with Computerease, then I think this is not... a sustainable thing to be completely honest.

ALEC

7:40 Well, I would just say, I know you guys have pretty aggressive broke hold. I know you last meeting that.

TRAVIS

7:46 Yeah.

ALEC

7:47 Five years, 60 texts. I would say if you really think that you got, so you're at a text. Now, I've seen your growth over the last couple of years from our records. I'd say, if you think you're gonna be at 18 text next year, then you probably should, you know, you probably should, you know, get the integration and explore that. But if you think, you know, it all just depends because I mean if it's within his budget, I mean, it's definitely, you know, worth cost it's just more of like there's a lot of other ways you'll see value as service trade, whether it's the deficiencies, you know, a lot of our customers, if they can get one or two quotes approved a month compared to what they're doing.

--- Pricing ends ---

ALEC

8:27 Now, service trade is already gonna pay for itself if you're never missing opportunities to deliver PMS. I mean, that's revenue that's coming in that wanna be coming in if you didn't have service trade.

TRAVIS

8:38 Right.

ALEC

8:38 And then all the, you know, communication between your text and someone like you or Jody or someone in the office that, you know, they won't have to call about service history or they won't have to call, where is my next job? All these things can compound either more jobs a week or more jobs created or less jobs missed. And that adds up. But I could definitely understand and, you know, world, you know, I understand that probably putting that invoicing information because that's what you're doing now from.

TRAVIS

9:06 Have...

ALEC

9:07 Their system into computers. Doesn't sound the most sexy for lack of a better term.

TRAVIS

9:10 So, yeah. So, what we're currently operating on, is paper tickets filled out and turned in once a week. Time is tracked through exact time... and then input it into Computerease. Okay. And then we're dispatching via outlook. So we have four separate touch points.

ALEC

9:36 Right.

TRAVIS

9:37 Four separate cracks that things tend to fall through. So if we could eliminate outlook, exact time and paper tickets at all, combine that into the field counterpart of Computerease. I mean, I don't see. Yeah, it's just, no, no brainer to meet.

ALEC

10:01 Yeah.

TRAVIS

10:02 I'm not the one writing the check.

ALEC

10:06 Yeah, for sure. And then with the exact time, where do you guys just put that time in Computerease or does that time go into any other system?

TRAVIS

10:14 No, it just, well, it goes into Computerease via their TK numbers. So I will assign the technician a TK number through computer, EAS manually write in their time on a time sheet. And then our HR lady puts it back into Computerease so you can see the inefficiencies here.

ALEC

10:44 Right, right. Yep. And so you using computers for pay?

TRAVIS

10:47 Then I'm assuming Computerease is in payroll. So.

ALEC

10:50 Yeah.

TRAVIS

10:51 Ticket time, payroll, invoicing integration. You know, I think this is really where Jody would have been a good person. I mean, he's the decision maker. I'm just a gatekeeper.

ALEC

11:07 No, you're more than that.

TRAVIS

11:09 But I think collectively we can, I mean, I see the value in it just to eliminate some of those cracks... things, you know, I'm new in this position. And I'm seeing things that are from April that are just sitting in billing limbo. And it's like, well, I mean... there's your money to pay for service trade right there and all this unbilled shit. So.

--- Pricing ---

ALEC

11:38 Right, right. And, you know, I do foresee a reality where we can get to that magical place. It's just a matter of, do we wanna do it now? Or do we want to grow into? Because sometimes if you go from point A to point D, that can be a big step and sometimes to gradually do it. And it also depends on, you know, where Jody checkbook or how much he wants to spend.

TRAVIS

12:01 Yeah.

ALEC

12:02 I don't would say that if he's really serious about, you know, growing to that, you know, and I love it how he has that aggressive goal.

TRAVIS

12:10 Yeah, you know.

ALEC

12:10 He has to realize companies like Kilgore, you know, a lot of companies that we work with in the area, they spend a good amount of money on technology and not just service trade. Obviously, there's other tech because, you know, technology helps you scale ideally, right? I'm sure everyone's you know, bought a bad software or something like that. It's not like they all work. But yeah, that's totally makes sense to me? Where do you think is based on your conversations with him? Are you kinda correct me if I'm reading between the lines, wrong? But are you saying that you kinda feel like the status goes creeping up where there's a chance he won't do anything or where do you think his kind of mind is?

TRAVIS

12:47 I think where he's hung up on price. It is a, it is a big limiter in our unfortunately, our operations right now... being in such a transitional period ourselves, going into a kind of a slower season historically, I don't know if he's... thinking more long term than, the immediate. I know he said he talked about going live on the first or Q1 at least. So maybe this is just information gathering, but, I think the priority is to get organized, get accurate reporting, get accurate KPI'S, and... you know, it's been his... marching orders for me is make some of this shit a priority. So.

ALEC

13:45 Yeah.

TRAVIS

13:45 It's there, it's just getting the budget in line and getting everything queued up to make that a priority for our budget.

ALEC

13:56 Right, right. And, you know, I understand how you would perceive, you know, the integration to be super important. And, and, I definitely feel your pain. I know it's not, you know, you know, your sales guy like me, you like your like me, I hate doing admin work. I don't like.

TRAVIS

14:12 Putting...

ALEC

14:12 Numbers in. I just like talking to people, you know, helping people out. So I get it. But, you know, if budgets holding them back then, you know, if we bring in the computer is the conversation. I mean, that just adds a whole another level of cost and.

TRAVIS

14:26 Yeah.

ALEC

14:27 And I feel like just from my perspective, I mean, you guys can do whatever you want. I mean, I'm not gonna, you know, tell you how to get in the door. I'll give you options, tell you the pro option, but typically, you know, companies that come from systems like yours, they get on service trade. Like I told you last time, the cost is really that big of a factor. I do foresee you guys could start on the select plan if you really had.

TRAVIS

14:50 Yeah.

ALEC

14:51 And that would definitely drive down the cost. The reason I just thought the premium plan would work better is because when you do start having the conversation about Computerease or anything like that, the premium plan is a lot easier to move around in our service tray because we're a multi product solution. But right? I think, you know, the select plan will definitely streamline your operation and get you more organized and they'll definitely get rid of that outlook.

TRAVIS

15:18 Yeah.

ALEC

15:18 And so you'll consolidate, you know, some tools and the idea is that as long as, you know, you guys are cool with us and, you know, trust us as a partner. Obviously, we work with a lot of companies like you guys around your area. You can grow with us that way. He's not having to take the hit so much upfront because to be honest, he didn't really have to right now because I think you guys would see a lot of ROI from service trade regardless of how you got in if you got in on our best plan or plan, you know, or not worst planning? You know what I mean?

--- Pricing ends ---

TRAVIS

15:48 Yeah. What if we ran it, let me ask you this. What if we ran it like this? We got one, two, three, four, five quote unquote service technicians. We actually lost one since the last time we spoke, so, we got two, two startup guys that primarily handle Construction projects.

ALEC

16:11 Okay.

TRAVIS

16:13 And then we have five guys that will run service at any given time.

ALEC

16:20 Okay.

TRAVIS

16:20 I mean, really, all of them would, but so five guys at the select level, I mean, that's pretty economical, right?

ALEC

16:28 Yeah, yeah, absolutely. And those Construction guys,, are, they ever come over and do service or they?

TRAVIS

16:38 They do. They, they do, they, yeah, we blend them pretty well, just out of necessity in that perfect world we talked about. They would, they would stay in their Lane, and they'd probably have a helper to go along with them. And I'd have 10 more guys, but... for now, I mean, let's just eliminate the budget as a conversation.

ALEC

17:05 Yeah.

TRAVIS

17:07 Because that's not really, that can go severe different ways.

ALEC

17:11 Right. Yeah, yeah.

TRAVIS

17:15 Our POS, how do POS integrate through that? I think we touched on, that will have to be manually. That would come with a Computerease integration, I guess, right?

ALEC

17:31 Right. So, I'm assuming you're cutting POS and computers.

TRAVIS

17:34 Yep.

ALEC

17:35 So, service trade core cannot cut POS.

TRAVIS

17:39 Okay.

ALEC

17:40 Now, like I said, if you, I'd have to double check with Tania, if the POS come over, I'm pretty sure they do, but I'd have to double check, Tania. Is our Computerease lady.

TRAVIS

17:49 Yeah.

ALEC

17:49 We do, if you guys ever get to a place where you start holding a lot of inventory or you want to track inventory on the trucks?

TRAVIS

17:57 Yeah, we...

ALEC

17:57 Do have this like partsledger module, but I want to recommend it. If that inventory tracking isn't you know?

TRAVIS

18:04 Yeah.

ALEC

18:04 No, but that will give you the ability to cut POS, if you want your text to cut POS. And that's also something you could grow into the future. Now. If you don't wanna do that... go into Computerease, go into service, trade some customers. If they, you know, don't have partsledger, which a lot of companies in your position don't start with partsledger. Obviously, they can use the job number as the po.

TRAVIS

18:28 Yeah.

ALEC

18:28 Instead of having to cut the po and they could do the job number and then put dash a, or I know everyone kinda does POS a little bit different.

TRAVIS

18:35 Yeah, right.

ALEC

18:36 That's also an option now for the two startup guys, if they come over to service, are they typically going with like a Foreman or a main guy or are they ever going out on?

TRAVIS

18:47 Their own? They are going out on their own. I mean, there will be a form in there, but, they fall under the service umbrella. So they are assigned and communicate through me... as the Construction department as my customer.

ALEC

19:06 Gotcha. Okay. Yeah, because I mean, there's two ways. So you're definitely gonna want at least one license for them. If they're going on their own, I probably if in a perfect world, I'd probably get them both on a license, but if you wanted to, I mean, is it often that they're both going out on their own on the same day? Is that frequent or is that kinda rare?

TRAVIS

19:24 No, they wouldn't run service... at the same time. It'd probably be for the limited amount of service that they would run. I think a paper ticket would probably do just fine.

ALEC

19:37 Okay. Well.

TRAVIS

19:39 Just the even streamline that even further budgetarily.

ALEC

19:46 Yeah. Well, I mean, because I mean if we get down to, we get down to and I definitely wanna, you know, show you some things that I don't want to just, you know, talk stuff. But if we, yeah. So I mean, if you're cool with that, you know, if we get down to five text selects now, can you remind me again, do you guys track equipment? Like do you track equipment history, equipment information? Is that something you track right now?

TRAVIS

20:14 No, currently, no, I would desperately love... that ability, to assign work to a serial number for, you know, warranty purposes or tracking or whatever the case? I would love to know how old equipment is all that stuff?

ALEC

20:36 Okay. Got you. So you'll be able to do that in service trade. The only, the reason I asked is the select plans price a little bit different than the premium plan. But essentially, I mean, if you guys wanted to get in that way just to get your feet wet, get in the door and start growing with us.

TRAVIS

20:51 I...

ALEC

20:52 Mean, it'll be a lot less expensive than the quote I sent you, I didn't know that, you know, obviously at the time, I didn't know your one guy was leaving and then I'll...

TRAVIS

21:00 I...

ALEC

21:00 Know that there was two Construction guys on.

TRAVIS

21:03 Yeah, I...

ALEC

21:04 Don't really remember what I went through last time, but you'd be looking at just seven K annually. If you went on the select plan just to get your feet in the door, you wanted to have the integration and you could have that, you know, you can still grow into that in the future, but you, I'll be able to track equipment. You still probably increase your billing process to less outstanding Ar, you'd still be able to track your PMS when the PMS are due, stuff like that.

TRAVIS

21:28 Yeah.

ALEC

21:28 And then you'd still be able to have the pull-through workflow that's really regardless of what plan or customers are in that's the reason they renew a service trade is just how easy it is for the text to report deficiencies, get those back to you. You send out the quotes. You'll start seeing money from that, and then, you know, you could go from there as far as how you want to grow with us and we do have a lot of customers that just are on that plan because they see enough ROI and, you know, a lot like I said, 40 percent of our customers don't have an integration. So you might.

TRAVIS

21:57 Yeah.

ALEC

21:57 I see a lot of ROI and you might just be like, you know, what? We can wait on this or, you know, you could not, you know, it's kind of up to.

TRAVIS

22:02 Yeah, guys. No, yeah... I think we walkthrough... the work order... and I don't remember where we left off.

ALEC

22:18 You're good. It was, it was a long time ago. I had to kinda look back myself on. So I'll just give you a refresher.

TRAVIS

22:24 Yeah.

ALEC

22:24 On some things in the office, but I'll start off on that billing piece since I know that's what you wanna see on the last thing I'll say too depending on, I don't know when you guys are looking to make a decision or not. But if you did go with the select plan on five techs, it's a quicker implementation because.

TRAVIS

22:43 Okay.

ALEC

22:44 It's less complex. So, I know last time I told you guys that... it would take 90 days, that was assuming you had eight techs. But if you go to five and get started with five, it's a 60 day implementation.

TRAVIS

22:57 Okay.

ALEC

22:57 That's just the longest it could take. We have customers that implement faster than that, but I don't wanna over promise or anything, but like...

TRAVIS

23:03 Gotcha.

ALEC

23:04 For example, if you made a decision, you know, in the next two weeks and you want the service trade, you could get an 11, one spot most likely assuming they don't all get taken up and you go live by the end of January. So it's not the end of the year, but it's you know, January.

TRAVIS

23:28 So it's still a 60, yeah, 60 day lead?

ALEC

23:33 If you went with a five.

TRAVIS

23:35 If you get, if...

ALEC

23:36 You needed six or seven, you're back to 90, but, you know, it's not a, it's not like it's not like, hey, you have six techs, you're gonna go, it's you know, we'll go as fast as you wanna go.

TRAVIS

23:46 It's just that you.

ALEC

23:47 Can conserve at least.

TRAVIS

23:48 I got you. Okay. All right. Yeah... I guess wherever we left off the billing, it kinda gets... answered since, he was wanting to hold off on integration. I mean, that's really?

ALEC

24:12 You might want to verify that with me. I think that's what he told me but he could have been getting some sticker shock as well.

--- *Wrap-up* ---

ALEC

24:19 You know, he never, and that's normal, you know, but yeah, so, you know, we'll definitely, you know, obviously, you know, whatever we go through today, I'll send you a recap. Well, I'll send you a recap, e-mail I'll put Jody on it as well, but... we will definitely, you know, probably meet next week and we can kinda get Joey's insights on it since I know he's out there fishing right now, so.

TRAVIS

24:44 Yeah, yeah. Yeah, he's still sent an e-mail so he's not enjoying his time out there.

ALEC

24:51 Man.

TRAVIS

24:52 Yeah.

ALEC

24:53 It's tough man.

TRAVIS

24:54 Yeah, yeah.

ALEC

24:55 I know, I was out for a bit because I had to get like surgery on my foot and it took me a lot to not check my e-mail... I don't know because, my dad's been in sales all his career too.

--- *Wrap-up ends* ---

ALEC

25:08 So, it's like I have all these salespeople and my family. I'm like I really need to learn to like just shut off my e-mail you know what I mean?

TRAVIS

25:14 Yeah.

ALEC

25:14 It's tough though.

TRAVIS

25:15 Yeah, it's hard in a sales or for sure. It's it's harder in a service management too. It's...

ALEC

25:21 Like that. Yeah, no.

TRAVIS

25:22 Everybody...

ALEC

25:25 And get a tack out there like the next minute.

TRAVIS

25:29 Yeah. It's always that. Yeah, and even...

ALEC

25:31 Get...

TRAVIS

25:32 In your time machine and get him here before it broke. Yeah.

ALEC

25:38 If you.

TRAVIS

25:38 Wanna just walkthrough the, where we left off, so.

ALEC

25:41 Yeah, you're good. You're good. So, this isn't the same work order. This is a different one I created for today. But last time we left off, I believe we completed the work order. So tech went out in the field. He reported his deficiencies, took his pictures clocked in, clocked out and all that came in real time and that all lives right here.

--- Pricing ---

ALEC

26:02 If you want emails about the deficiencies, you would get those. You can quote those out. That's not what we're really talking about here. We're talking about billing this job, right? So let's say.

TRAVIS

26:11 Well, let me say, what do I see from the office standpoint technician closes out is, am I looking at a dashboard on my end?

ALEC

26:24 Yep. That's that's like one of the main ways you could. So we do have this dashboard. This is what you'll see right? When you log in basically where that would live. Let's say your tech completed the work and you?

TRAVIS

26:36 Before you get any further, I can't really see it's just a black screen for me.

ALEC

26:42 Really?

TRAVIS

26:43 Let's see it's interesting. Yeah, I mean, I can see the... now your full size... is just black.

ALEC

26:55 Really? It's weird.

TRAVIS

27:01 I wonder if I join in from my computer, I can see it.

ALEC

27:05 Yeah. Maybe try that. I don't know if that's me or you. I really hope it's not me.

TRAVIS

27:09 I'm on an iPad. So, you know?

ALEC

27:13 Yeah, maybe I'll turn off my camera, maybe does that change anything?

TRAVIS

27:17 No, still black, no. Okay. You're good. Let's see.

TRAVIS

27:34 Yeah. It gave me one of these little mini, it's got a, I three in it.

ALEC

27:44 Yeah.

TRAVIS

27:47 Yeah. So... might as well just give me a typewriter.

ALEC

27:56 Yeah, man. Well, I don't know like I got there. You are, I got a brother that's like 10 years younger than me. So he basically lived in a different world growing up and it's like I was still, you know, watching stuff on a box TV. No HD people got like 85 inch TV'S in their living rooms and they're not even that expensive anymore, really.

TRAVIS

28:17 I know my inlaws just got their 85 inch and they pay like 500 bucks for it. I'm like my 55 inch cost me a 1,000 dollars five years ago.

ALEC

28:29 Yeah. Well, that sounds awesome though at the same time, I could only imagine Sunday Sundays in that house.

TRAVIS

28:34 Yeah, it's lot. It's it's a little much to be.

ALEC

28:40 Yeah, I...

TRAVIS

28:40 All right. I'm seeing you. I'm visible. I'm just listening to you from over here.

ALEC

28:46 Okay. Totally. Fine. So basically the one way you could see that there's all types of reports and stuff like that, but if you wanted to see the work orders that your technicians have completed, they just haven't been passed onto billing yet. They basically live in this past jobs to be marked complete bucket.

TRAVIS

29:04 So this is browser, this is a browser based. I can look at this from the tablet. I don't have to be on a laptop.

ALEC

29:12 Correct. So the office view is best used in like on a computer. But if you wanted to log in to your browser on a tablet, you can see that there too.

TRAVIS

29:20 Okay. Cool.

ALEC

29:21 But essentially, yeah. So everything we're doing right now is office view. So all you need to access this is a browser, an internet. So if you log in, you know, you'll see all this. And basically when your technician completes the work orders and you want to review on before passing on to billing, you would look at past jobs to be marked complete. So, these are work orders where the technician has completed them on their end, it just goes in this review bucket before passing it onto billing. And then once you pass it onto billing, it'll be completed jobs to be invoiced. This is just a final reminder to invoice out this work.

--- Pricing ends ---

ALEC

30:00 Now, if we look at it on a work order level, so I'm just gonna manually mark these as complete, but just know when your technician does in the field, they obviously do this not.

TRAVIS

30:10 Got you.

ALEC

30:11 But essentially... so this is how it show up. So if your technician completed the appointment and completed the service, you'll see it's completed.

TRAVIS

30:22 Yeah.

ALEC

30:24 You might want to review their parts, labor items. So, what did they document on the job? What was their labor parts, labor items? It's very simple for the technician to add or adjust parts, labor items. But obviously, you want to review that before billing it out.

TRAVIS

30:41 Are these prices put in by the technician? This unit cost?

ALEC

30:45 They can be if you want them to. So you can either have them manually put it in or if you want some items that have a preset cost, you can put that in. It's up to you guys. And then even if it does have a preset cost, they can.

TRAVIS

30:58 Yeah. Well, we won't use the preset cost. We won't write inventory, so.

ALEC

31:04 Is fine.

TRAVIS

31:05 Yeah.

ALEC

31:06 Yeah. So you can, if, yeah, if you don't wanna do that, you don't have to do that and you can create items from scratch or you can put in your own items however you wanna do it.

TRAVIS

31:16 I...

ALEC

31:16 Go in here and I add an item. I can either add one from scratch like one that's never been added or I can choose from items I have. So it's up to you.

TRAVIS

31:24 Okay, perfect.

ALEC

31:27 So, once you're once the tech is completed in there and you're ready to Bill it, all I'll do is click complete job and I'll click complete job and create invoice.

TRAVIS

31:39 Okay.

ALEC

31:41 This is where you're gonna review, hey, what's my cost? Are these costs correct? It's a checks and balances. So you're you know, you're double checking the technician, you might be even double checking yourself. Okay? These costs are correct. Let me create an invoice.

ALEC

32:00 So similar to the quote, the invoice can be formatted the way you want it to. So I'm gonna go ahead and make this, you know, grand total only, but you have a couple of other options here as far as what you want your customer to see.

ALEC

32:22 And basically, most of our customers of your size are invoicing out a service trade because the customer can pay right then and there, it's easy for them to interact with. And we get a post job report. So we can go ahead and invoice this out of service trade right now. So keep in mind the tech could have completed the job today. It could be four or four 30 before you leave in the office, you look over this

stuff and then you're sending it out the next day because the highest performing customers we have send it out between one to three days. So yeah, you'll definitely be able to get that accomplished in service trade. So as far as what that looks for the customer, obviously, it's gonna be formatted the way you want it to be formatted. So grand total stuff like that, your terms and conditions, you have the pay. Now, they've been a long time customer and they don't have any questions they can pay right then and there with a credit card. And then if they click this service details, this is what we call a service link. This is a live link you can send at any point in the workflow automatically gets attached to the invoice. It's up to you on how much you want them to see or how little you want them to see. Okay? But essentially, this is designed to limit those billing disputes. But basically, you can see here that... you know, they can see whatever they need. So if you have any pictures or work acknowledgements or stuff like that, they see those here, you report any deficiencies, any comments or any parts labor items you'd want them to see it's up to you on what you want them to see. And the idea is that once they look at this, see that visibility, they're not gonna have any questions and they're gonna.

TRAVIS

34:06 Write them. So with Computerease integration, does that change what the billing looks like on the customer end? Because I'll show you.

ALEC

34:19 Yeah, you're good.

TRAVIS

34:20 Invoices currently look like. I don't know if you can see it.

ALEC

34:24 I can a little bit...

TRAVIS

34:25 That'll that'll come out of, yeah, that comes out of Computerease like that, right?

ALEC

34:30 Yeah.

TRAVIS

34:32 With an integration, we would send the customers that finished product correct?

ALEC

34:40 So, in short, it just depends, I mean, a lot of our customers, like I said, they send invoices out of service trade because they prefer to, they like the way it looks, they like the way it presents its brand and it usually helps out with outstanding Ar, but if you wanted to send it out of Computerease, you could absolutely do that if you prefer that for whatever reason. And even right now, if you'd rather send it out of

Computerease than service trade for whatever reason, you can still do what you're doing right now, which is take this financial information, put it into Computerease and Bill it from there. So it just kinda depends on what the priority is, if the priority is to improve outstanding, Ar, you probably want to send it out of service trade because it'll be quicker. It'll be easier for the customer. But if, for whatever.

--- Call Setup ---

TRAVIS

35:25 Perfect. Yeah. Let me catch him. Hey, Jody. Hey, TRAVIS. Hey, what's going on? Hey, do you have something from Johnson supplier that's being delivered today? Not that I'm aware of. No, it's not mine. I don't think. Okay, no to set some TV or something... less is something for?

TRAVIS

36:21 Hello? Can you hear me?

ALEC

36:25 Yeah, yeah.

TRAVIS

36:27 Is Jody?

ALEC

36:29 You're good? You think?

TRAVIS

36:33 Yeah, he went silent on me. He's out on the lake.

ALEC

36:38 Well, man.

TRAVIS

36:39 I don't know where he's at, but he went silent.

ALEC

36:42 Dang. Well, I just had that he has to do all this on the lake, maybe service trade or something like that. You won't have to do that.

TRAVIS

36:50 Yeah, right. Right. Okay. So, yeah, so it does it, you can go both ways. You can build it out of service trade or you can build it out of Computerease. It's...

ALEC

37:01 Yeah. Yep. Absolutely. So, any questions on that or pretty straightforward or what do you think?

TRAVIS

37:13 Pretty straightforward, pretty straightforward. I'm looking at it from both ways. If, if we don't integrate, then I can just transcribe it out of this. It's a much better... format than a paper ticket, that I may or may not get.

ALEC

37:31 Yeah, exactly.

TRAVIS

37:34 Yeah. So, no, I'm good with this. Okay?

ALEC

37:37 Okay. And I would say that if your goal is to help this get approved, you know, I think that's probably your best route. So, yeah, especially considering, you know, you lost a guy that's you know, a fair share of invoices that you just don't have to deal with until you hire another.

TRAVIS

37:53 One more time. I just got to interrupt you.

ALEC

37:55 Good.

TRAVIS

37:57 I lost you. You're good. Okay?

TRAVIS

38:12 Okay.

TRAVIS

38:17 So.

--- Call Setup ends ---

TRAVIS

38:25 Okay. Yeah. I'm here. I'll receive it. Yeah, thank you. You just can't turn it off. I guess.

ALEC

38:38 I mean, I can either, so who am I?

TRAVIS

38:40 Yeah, right. Well, I can very well, I don't have a problem with that.

ALEC

38:47 Yeah. Well, I mean, I guess about as on a lake or on an ocean. I think that's where I draw the line personally.

TRAVIS

38:52 Yeah, one thing.

ALEC

38:53 I just be chilling in the house or walking around, you know, super market, or something. But if I'm on the way, yeah, I'm probably not doing that, I guess.

TRAVIS

39:00 Yeah.

ALEC

39:01 But I've also never been a, you know, as high up as I'm in a company yet, so I can only.

TRAVIS

39:06 That's that's probably why we don't have precedent titles yet.

ALEC

39:09 Yeah, it's probably why shouldn't we even be talking about it?

TRAVIS

39:12 Yeah.

ALEC

39:13 Yeah. Okay. Cool. Was there anything else you wanna go through in here today as far as this?

TRAVIS

39:22 No, to be honest, no, I mean, I think... for what I wanted to do, I think this is a, this is a solid choice. We just need to figure out how to pay for it. So we're back to that again, but I like it as far as far as what it's gonna present because I am, I'm the billing department... as it stands right now, this will present a little bit neater format more accurate more if the guys are logging time through this, then we'll get true time reporting instead of a text message saying I forgot to clock in at seven, you know? So, yeah... and it tracks equipment. It can track site history. It can track pretty much anything you needed to track.

TRAVIS

40:26 Yeah, I don't think you need to walk through much more. I think we next step is to set up a follow up, with Jody something he can attend, okay, work out the details of it all. But I think as far as the presentation part, I think, you pitched it, I'm sold, we just got to figure the rest out.

ALEC

40:50 I appreciate that man. I really do, yeah, because I just think, you know, I appreciate that. But I also think more importantly, I think Jody goals and service trade goals align. And I think that's really what it's about more than anything other than me or yourself is that, you know, I think, I know he was pretty impressed when I mentioned some of the companies we have in the area, but, you know, he has aggressive goals. We have companies that want to grow into the company he wants to be at. And the idea is, you know, yes service trade, you know, it does cost money, but the idea is that... is something you can scale with. You guys aren't going to have to change softwares every two years. You know, you can grow a service trade.

TRAVIS

41:33 You...

ALEC

41:33 Grow, we grow, we deliver value. You're gonna want to spend more money with us. We're going to invest more in you and it's gonna be a long term partnership. So yeah, we can definitely figure that out. So, the only other thing I have for you before I or two things I have for you before I let you go because I know it's Friday here. So as far as, the only thing is, so these Construction guys, you don't think that you don't think it'll be a big deal that they're going to have their own separate process other than service trade because that's my only concern a little bit here is that, you know, maybe those guys are gonna have, I mean, if they're not doing that many jobs, it's probably not a big deal. Do you think Jody is gonna care that you're going to start off with your main five service guys? You think it's gonna concern him at all?

TRAVIS

42:22 No, I think ideally we would want everybody. I mean, if we were going to have to Cherry pick and make this as economical as possible to start out with, that would be my suggestion, is that we have these two other guys that primarily do startups, they don't write tickets for that. They, they kinda operate on their own little system... systems that we already have in place and we'll continue to use another Construction group will still use exact time, so it'll still be in play... for that.

ALEC

43:00 Just to simplify, let's just not worry about it. I mean, you can always buy more licenses and pro rate it. But also if he wants to buy more too, you know, it's up to him.

TRAVIS

43:11 That's...

ALEC

43:13 What we have to do.

TRAVIS

43:14 Yeah, that's just, the, you know, budget conversation. If it's five. If we need five, we need 10 because we're going to need more either way down the road. So.

ALEC

43:25 Right, right. And the way that works just to let you know, it's pro rated. So six months from now, you hire another one. But if you went with that, I mean this is definitely a lot different than what I showed him. I mean, I think this is like, I can't remember what I quoted him last time, but I think this is at least seven to nine K cheaper than what we talked about last time, but, I...

TRAVIS

43:47 It's about half. Yeah, you're about half of what you were. Yeah. So, yeah... all right.

ALEC

43:57 And I'll send this to you too. But if you want to write that down real quick, you can.

TRAVIS

44:01 We're on the first year total. Okay. That's not bad.

ALEC

44:06 In that onboarding, it basically includes, you know, you'll have an implementation specialists to make sure you go live in Q1. You'll have, you know, training videos for your text for yourself, you'll have a point of contact for that. And then after that, you'll get handed off to an account manager. So you'll have someone to help you guys, you know, when you want to have those conversations, we kinda just talked about. They'll be kind of your point of contact.

TRAVIS

44:31 That, yeah, I mean, I see this being a very self paying for service for that price. Just looking at some of the invoices. I pulled out of billing limbo. I mean, that's we can have 100 techs for what I've done for what happens. So.

ALEC

44:56 Okay. Well, well, cool.

--- Next Steps ---

ALEC

45:00 So when you think Jody will know when we can meet and I can put together a more formal proposal and we can talk that, you know, to be honest, I wanna be surprised if you just told them this and he's like, yeah, let's just go just because it's like, you know.

TRAVIS

45:17 Yeah.

ALEC

45:18 A lot cheaper. So now that fits in his picture. But when you think you'll have an idea on when we could, you know, meet next week and kinda hash that out. That way you guys can get a good.

TRAVIS

45:31 Yeah. Let me look.

ALEC

45:31 Onboarding date.

TRAVIS

45:41 Let's see, can't see his calendar?

ALEC

45:44 You're good?

TRAVIS

45:46 But I can add something in its... Jody appears to be available... Tuesday Wednesday.

ALEC

46:00 Okay.

TRAVIS

46:02 Thursday and, yeah.

ALEC

46:08 We don't have to schedule it now.

TRAVIS

46:09 You want...

ALEC

46:10 Me to just reach out to you on Monday when you get an idea or I could just send you guys my schedule like I did that one time. We can do that. I mean, you don't have to schedule it now, but if you have, if you want to schedule it now, we can, but you don't have to, if you don't want.

TRAVIS

46:23 Yeah, yeah. Give me a chance to talk to him. I'll get with him on Monday and we'll I'll kinda catch him up what we talked about, see where we're at.

--- Next Steps ends ---

TRAVIS

46:32 And then if he has any more, then we'll schedule, but, I think you're right? It's either, yeah, you're a type of thing. I don't think there's any more information to give? So.

ALEC

46:47 Right. Yeah. I mean, yeah, I mean, I'd be very surprised if, you know, he didn't see the ROI from, this quote, at least honestly, I'd be if I'm just being completely honest with you, I'd be pretty surprised based on his goals that he wanted at least get going with this, but we'll kinda play it by year by?

TRAVIS

47:06 Yeah.

ALEC

47:07 The last thing I would want though is that here's a price and then he's like now, I think we'll just switch play here. We'll just see, what happens with that and let me.

TRAVIS

47:18 This is this payable monthly or quarterly or does it all have to be yearly?

ALEC

47:27 Yeah. So it is annual. Now, what I would say is that it's for, I'll just be honest for deals of this size. I mean, this is the smallest deal we sell. So it's hard to get terms like that approved.

TRAVIS

47:43 It is, it?

ALEC

47:44 Is the last day of our quarter, but he's also on a lake. So, I don't know how much he wants to deal with that right now. Like, if he was in a perfect world, if he was here, you know, we might have been able to, you know, do something. But if, you know, I don't wanna, I don't want to pitch them on a boat or anything like that, you know?

TRAVIS

48:05 Yeah, no, I was just curious if that was something that, is even worth talking about or if that's just, we'll just keep it like this.

ALEC

48:16 Yeah. It's it's probably not. I mean, if... see my thing, is that if he's sold on service trade, I don't think price is going to be an issue. I feel he pushes back on this price instead isn't seeing the value or there's just some kind of gap there. So, and I feel like he will just based on his goals. So not really. I mean this is a lot less expensive, but if he look, if he like service trade, I'm sure he trust your opinion... and that's the last thing outstanding, please let me know and I can see what I can do, but just full transparency, you know, this is the smallest deal we sell, so.

TRAVIS

48:57 Yeah.

ALEC

49:00 I think, I don't really, I'm not really too worried about it though for your sake at the same time, I'm not really.

TRAVIS

49:05 Yeah, I think this is.

ALEC

49:06 Pretty fair for what we're doing for your business. So, TRAVIS, when could I call you on Tuesday to see what that conversation was like with Jody? And then if we need to have a further conversation, we can, or if Jody is like pull the trigger, obviously, you guys can just let me know.

TRAVIS

49:24 Yeah. Hit me up. Any, any time on Tuesday is fine. Any time?

ALEC

49:32 I'm...

TRAVIS

49:32 An hour behind you. So please don't call me at seven.

ALEC

49:38 Right. Okay. Yeah, I'll definitely won't call you at three E. M.

TRAVIS

49:43 Yeah. Any, any time is fine. Honestly? Whatever works for you? Okay?

ALEC

49:47 I'll just send you a little, I'll call you at 11 on Tuesday. Does that work? Well?

TRAVIS

49:51 Yeah, I...

ALEC

49:52 Mean, could I...

TRAVIS

49:53 Go you?

ALEC

49:54 Could I call you at 11 30 actually?

TRAVIS

49:57 Yeah, yeah, that'll...

ALEC

49:59 Okay, sweet. I'll send you, I'll send you a calendar invite for that. I'll send you and Jody recap e-mail probably not today, but I'll send that Monday morning. So top of mind for you guys and I'll include this new quote, this demo recording and anything else I think you guys will like to see. So be on the lookout for that. I'll probably send that around seven or eight, your time on Monday. I know that I can send it a little later, but that's not the best time, but I'll just send.

TRAVIS

50:28 Okay. Yeah. Sounds good.

ALEC

50:30 All right.

TRAVIS

50:31 Sounds like a plan.

ALEC

50:32 Sweet. Well, TRAVIS, good. Talking to you. Hope you have a good weekend, but regardless of what Jody wants to do, I do appreciate your buying. It seems like you would go with this if it was just your decision. So I'm pretty confident Jody will wanna move forward with this. So, I'm excited to see what we can do for your company and how you guys can grow with us, but we'll play by here and see what we can do from here. Okay?

TRAVIS

50:54 Yeah, yeah, definitely. I just think, I think we're all on board. I just think it's can we make it work? And that's not anything to do with the price or it's just, can we do it in this time in our, you know, company? So, but yeah, we'll go from there, we'll make that. We'll put that on the higher ups?

ALEC

51:16 All right. Sweet. Okay, cool. I'll send you that calendar invite for that. I'll send you the recap e-mail, Monday morning and I'll look forward to talking to you Tuesday. Okay?

TRAVIS

51:25 Yeah, sounds good, man. I appreciate it.

ALEC

51:27 It's calling the main line. The best way to reach.

TRAVIS

51:30 No, no. My cell. I come in... it's my cell is the best. I don't have a desk line?

ALEC

51:39 Okay. Could you just give me that real quick? So I could call you there?

TRAVIS

51:42 Yeah, three four, six.

ALEC

51:43 Three four, six.

TRAVIS

51:45 Five five zero.

ALEC

51:47 Five five zero.

TRAVIS

51:48 Six one five eight.

ALEC

51:52 Okay, cool. Well, I'll let you go. I'll let you go TRAVIS, but you have a good weekend. Okay?

TRAVIS

51:58 You too, man. Thank you. Have a good.

ALEC

51:59 Bye.

TRAVIS

52:00 Mike... what's...

The End