



ServiceTrade Demo with Walschon Fire Protection

Dan Waggoner with Walschon Fire Protection
Recorded on 5/16/23 via Zoom, 1 hour 5 min.

Participants

SERVICETRADE

Dan Waggoner
Territory Manager

Henry Drake
SDR

WALSCHON FIRE PROTECTION

Jason Hudgins
V Pres-sec-treas

Topics

<i>Purchase decision</i>	0:31
<i>Type of work</i>	2:40
<i>Type of work</i>	4:44
<i>Accounting integrations</i>	6:26
<i>Accounting integrations</i>	7:59
<i>Paper process</i>	8:22
<i>Deficiencies</i>	9:14
<i>Quoting</i>	9:32
<i>Customer engagement</i>	10:03
<i>Type of work</i>	10:24
<i>ST app contracts and pricing</i>	10:40
<i>Recurring maintenance</i>	11:20
<i>Customer engagement</i>	12:00
<i>ST app contracts and pricing</i>	13:14
<i>Customer engagement</i>	15:34
<i>Forms</i>	15:52
<i>Customer engagement</i>	17:37
<i>Paper process</i>	20:39
<i>Tech time tracking</i>	21:08
<i>Pricing</i>	22:45
<i>Purchase decision</i>	24:19
<i>Customer engagement</i>	24:37
<i>Recurring maintenance</i>	25:04
<i>Forms</i>	25:24
<i>Customer engagement</i>	25:40
<i>Deficiencies</i>	26:48
<i>Assets</i>	27:10
<i>Customer engagement</i>	28:03
<i>Customer engagement</i>	28:46
<i>Deficiencies</i>	29:04
<i>Deficiencies</i>	29:42
<i>Customer engagement</i>	30:35
<i>Customer engagement</i>	32:14
<i>Forms</i>	32:58
<i>Access to information</i>	33:48
<i>Access to information</i>	35:05
<i>Tech On-site</i>	35:43
<i>Tech time tracking</i>	36:02
<i>Assets</i>	36:21

<i>Deficiencies</i>	37:23
<i>Assets</i>	37:58
<i>Forms</i>	38:18
<i>Forms</i>	39:06
<i>Forms</i>	40:40
<i>Deficiencies</i>	42:25
<i>Assets</i>	43:20
<i>Forms</i>	43:52
<i>Forms</i>	48:12
<i>Forms</i>	49:32
<i>Forms</i>	50:27
<i>Forms</i>	51:37
<i>Deficiencies</i>	52:22
<i>Recurring maintenance</i>	52:43
<i>Forms</i>	54:02
<i>Deficiencies</i>	56:26
<i>Quote templates</i>	57:12
<i>ST app contracts and pricing</i>	58:04
<i>Quote templates</i>	58:26
<i>Customer engagement (quoting and invoicing)</i>	58:46
<i>Quoting</i>	59:16
<i>Quoting</i>	1:00:18
<i>Customer engagement</i>	1:01:42
<i>Type of work</i>	1:02:05
<i>Purchase decision</i>	1:02:30

Transcript

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

DAN

0:00 You doing?

JASON

0:02 Can you hear me? I can yep.

DAN

0:05 Doing...

JASON

0:05 Great. How are you doing?

DAN

0:07 I'm excellent. Thanks. Well, my name's Dan that they're on the screen probably, but good to meet you. Jason. I'm the territory manager here for the southwest at service trade. So I meet with folks and companies that are interested in learning more about our software. And did you have anyone else from your team joining?

--- Purchase decision ---

JASON

0:31 No, just me.

DAN

0:32 Okay. Sounds good. Well, typically, the way I like to run these things is to start off by talking a little bit about what had you interested in taking the meeting, right? I know you're a busy man. If you're like any of, the folks that I work with. So what your curiosities were, and possibly any challenges that you currently have and those line up with our product, right? And then we'll obviously take a walkthrough the product. If this looks like it's something that's going to provide value to you or has potential, can provide value, then we can talk about next steps, pricing and what have you, but does that make sense for a plan?

--- Purchase decision ends ---

DAN

1:12 Yeah. Sure. Okay. Well, Jason and my notes here. I've got a pretty short list of notes from Henry who set the call up. But what I understand you all had run into us at the nfsa conference recently and you're just curious check in the platform out a little bit more. And are you the president over there?

JASON

1:34 I'm my title is vice president, but I'm only not president because I don't have my own individual 16 yet. So I am the boss and, I do make all the decisions.

DAN

1:45 Okay. Well, fantastic. And help me out here because I've been, I wanna say wall Shawn fire protection, but am I saying that? Right? Yeah.

JASON

1:54 That's all right. Yeah, it's someone's last name who's no longer involved in the organization. So I'm not offended. Either way pronounce it however you'd like.

DAN

2:02 Okay, cool. Well, we'll go with that. I didn't want to be butchering it the entire time?

JASON

2:06 Yeah, I...

DAN

2:06 Appreciate that.

JASON

2:08 Well...

DAN

2:09 Jason, if you don't mind, would you kinda share with me a little bit about what you guys do, what your focus is, and you know, what has you interested in sitting down today?

JASON

2:17 Well, we, of course, are fire sprinkler contractor. We've been around since 1989, and we are in the San Francisco bay area. We service all, the nine counties, major counties in the region. We are a union contractor. We use union only labor that for including our inspections, testing and maintenance.

--- Type of work ---

JASON

2:40 But we're a full service fire sprinkler contractor. So by that, I mean, we do design build, we do emergency service calls. We do inspections, testing and maintenance. We do underground repairs and upgrades. We do a small ti. So pretty much anything you know, I might need, we provide engineering services. We have design in house. We have access to professional engineers. So we have a, we handle a large variety of different kinds, of fire sprinkler projects.

DAN

3:19 Okay. Excellent. And so you mentioned, right? Inspections, testing, maintenance, design, build, engineering, underground, all that stuff. So I have here in the notes that you guys have about 10 field employees. Is that it sounds like since 1989, I was kind of expecting a few more, but is that accurate?

JASON

3:40 Yeah. 10 people is about accurate. Yeah.

DAN

3:42 Okay. Cool. Gotcha. And are all of those folks doing a mix of everything that you listed? Or do you have some that are, you know, certified for inspection? So they focus in that area that's...

--- *Type of work ends* ---

JASON

3:55 It's a variety again where union... do you know when I say where union? Do you know, do you know what, I?

DAN

4:04 You know, I heard quite a bit of what you might imply, but let me know in your case, what would that mean?

JASON

4:11 All right. So it means my field technicians are part of a local union at sprinkler fitters union. So they are trained by the union and provided by the union. So, that being said, they are trained in both nfpa 13 and nfpa 25. So what are my field technicians might do an underground flush one day and an nfpa inspection the next, and a fire pump acceptance test the next day and a tenant improvement the next day.

--- *Type of work* ---

JASON

4:44 So... so all my guys, we don't have dudes that specialize like if you had, a non union organization, for example, you could use inspection technicians to do one kind of work and you could use pipefitters to do another kind of work. But we don't limit our workers ability just in one vertical because they're highly paid and highly skilled for the union. So they handle a large variety of different things. So there wouldn't be any specialization. They all handle everything.

DAN

5:20 Gotcha. So with the union, and thank you for explaining that to me because I think that's that gave me some clarity, for the union that you're you know, everyone's coming from, are they, so they're all always qualified? I'm just wondering if that would make sense like for another company in your area getting, if they were a union company as well, would they also have like similar line up as you kind of ran down there?

JASON

5:48 Yeah, that's right. I have a few local competitors where they are. They are structured the same way.

DAN

5:55 Okay. Interesting. Yeah, that helps me make a little bit more sense of some of the things that piece together over the years. So with the union of providing the technicians, are you... because something I hear from folks all the time, I don't know if this is the case for you. It's like you got more work than you can handle, but not enough skilled labor, right? A labor shortage is kind of something that's hit the service industry and, the contracting industry as a whole. Is that something that you're dealing with or?

--- Accounting integrations ---

JASON

6:26 No, no.

DAN

6:28 Okay. Gotcha. Well... as far as service trade and field service management... what are your curiosities? Are there any challenges you're up against right now? Something that you wish it worked better? You wish you could do better opportunities for...

JASON

6:46 Growth. We, we currently use a field service solution. We use Sage as the back end is our accounting software. And then we use mobile tech tool, which is a service module plugin for Sage for distribution of work orders in the field. And it works fairly well. I'm able to dispatch from the office or have dispatched paperwork and daily reports and work assignments and all that stuff.

--- Accounting integrations ends ---

JASON

7:14 So, and guys are able to get that work. And then with the tool on their ipads, being able to submit the paperwork, as appropriate for their completion of jobs. And if there's any problems with those jobs, they can submit reports that say there's a

problem with this job. And I guess right into the office. And so we've already got... a CRM solution in place. But part of my job in leading this organization is always being keen on developments that might benefit us. So, even though there's nothing broken with our current process, I'm always open to entertaining new ideas on doing things better.

--- *Accounting integrations* ---

DAN

7:59 Gotcha. Well, excellent. So the, is it Sage 100 or 300 out of curiosity?

JASON

8:06 I don't know.

DAN

8:07 Gotcha. And you said it's called mobile tech was the.

JASON

8:11 The mobile tech tool. Yeah, mobile tech tool.

DAN

8:15 Interesting. Do you know if that's like... was that sold to you by Sage? Are you, are you unsure or?

--- *Paper process* ---

JASON

8:22 I don't know. Okay, it was before my time. We've been using it for a while.

DAN

8:28 Gotcha. What else goes into? You know, as far as one thing in particular, I guess, that might be quoting, right? So maybe you go out to tenant improvement or an inspection with deficiencies, obviously get those quoted out to the customer. Do you, are you utilizing any other platforms or programs to organize that information and follow up on quotes?

JASON

8:55 Not really. No. We, I've got somebody for I have an employee who does it administratively. The, the challenge that we often have in the field is that there are typos or errors with the reports that takes a human to look over to be sure it's accurate. And, and we have a gotcha.

--- *Deficiencies* ---

JASON

9:14 We also have to be very careful on what's a deficiency and what's a recommendation. So, so there's, some human review that takes place and that human that does the review types up deficiency repair quote, sends it over my desk and I price it up, send it back to that individual.

--- Quoting ---

JASON

9:32 And that person sends out the quote. Our conversion ratio and deficiency repairs is extremely high. And so there's really no follow-up needed.

DAN

9:44 Okay, nice.

JASON

9:47 The, the benefit, of running, a long term service organization is almost everybody that we work with are long term clients. So when we give them a quote, it's no issue. They just sign it and send it back.

--- Customer engagement ---

DAN

10:03 Excellent. Well, that, that's really what our platform is. All built. That around is focusing on long term client relationships and then maximizing the both the value for the client by showing them the work that you're doing as well as, you know, opportunity for you. All right. Make it easy protect to bought the deficiencies, repair opportunities and touch.

--- Type of work ---

DAN

10:24 It seems like you've got that process nailed down pretty well... but I think you'll be curious or you'll probably like what you see as far as that part goes. And when you say long term relationships with clients and long term clients, do you have service agreements with them?

--- ST app contracts and pricing ---

DAN

10:40 Contract? Yeah? Excellent. How many, if you just had to guess or maybe, you know, exactly. But as far as like the percentage of customers under contract versus those that might be calling you for the first time or just call you in the emergency.

JASON

10:56 All... right. So what's your?

DAN

11:00 Yeah, I'm sorry, I made that confusing customers. The percentage of your work that is a customer under contract versus a customer that is not under contract?

JASON

11:10 99 percent.

DAN

11:12 That's awesome.

JASON

11:13 I don't know how you could run it any other way.

DAN

11:16 Well, you'd be surprised Jason, but folks are out there doing it.

--- *Recurring maintenance* ---

JASON

11:20 Really? So there are people performing work without a regular relationship, with the person that performing work.

DAN

11:27 Well, they might have a relationship, but if they don't have a like a service level agreement or contract in place, then it's really based on calling up and saying, hey, we know you're due, can we come out there and do the work this time around?

JASON

11:40 No way, that really happens in the inspection space. It does. So wait, so one company will do like a quarterly and then the next company will cop and say, hey, let me do your quarterly. I know it was just done by abc fire, but your quarterlies probably due, I wanted to your quarterly for 10 dollars less.

--- *Customer engagement* ---

DAN

12:00 Yes... that's crazy. It actually happens. I agree. It's crazy specifically in your space when it's, the inspections are there to capture that pull through revenue, capture those repairs and to establish yourself as the provider, right? And it brings a lot more opportunity, right? The probably your revenue from inspections is not the bulk of the overall company revenue. I would guess.

--- *Customer engagement ends* ---

JASON

12:29 A, good chunk. Yeah.

DAN

12:35 I guess, the margins though, I guess what I'm getting at is typically like the margins for repairs and improvements, that type of thing end up being a lot higher and better. So, the work that you get from those inspections almost is the reason you get that inspection contract. That's kind of how I see it. Maybe I'm wrong. You, you tell me?

JASON

12:54 In my experience, you're dead wrong, but your experience is your experience. So, you, so you have other contractors coming to you saying the, what I'm hearing you say Dan, is that you have other contractors that come to you and say, we throw away the inspection because we're trying to get the repair job?

--- *ST app contracts and pricing* ---

DAN

13:14 No, no, no. They're 100 percent going after the inspection, right? Lock in the inspection contract. But then, the reason they're going after that contract is so that they can collect all the other jobs, you know, repairs, replacements, improvements from the relationship they build to the inspection, the deficiencies and all that good stuff.

JASON

13:34 Yeah, that's what I said. Yeah. So, the, when I say throw away, I mean, don't throw away the report but aren't really considered with making margin, you know, they'll do it at cost or at a reduced cost, they get their foot in the door so they could charge them more on the repair.

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

DAN

13:50 Yeah. I mean, I wouldn't necessarily say do it at cost and I'd have to talk to people more specifically about that. But typically, the feedback I hear from folks that I work with is that, the repairs they're doing end up being a higher margin. So a better profit at the end of the day than most of the inspection. That's just the general feedback.

JASON

14:11 Yeah, we, I guess we're an anomaly. We don't do it that way. We price it fairly on the inspection, and then make ourselves whole on the inspection. So there's no pressure for the repair, you know, for us is the relationship, right? It's the accuracy, is the quality, it's the transparency, it's the honesty. It's it's all those things. So, okay. So if we happen to get the repair or if repair work at, I work comes out of it, that's just a bonus for us. It means often, you know, we are not super competitive on price,

but that's not really what we're selling, you know, we're selling the relationship, we're selling expertise... absolutely.

DAN

14:53 And at the end of the day, you know, when you're able to show your expertise and build, the client relationship, then price shouldn't be even what it's about, right? They should.

JASON

15:02 Exactly, right? It's about execution, completing the work, an appropriate time frame in a way that makes sense, you know, for the clients individual needs, right? It's going to be done right the first time. And if there's a leak, we just resolve it. If there's a cost overrun, we don't bother the client with it, right? Again, as relationship.

DAN

15:20 Yeah. And yeah, I mean if it was all about the, you know, nickel and Diamond, there's the one truck Chuck is what one of my coworkers likes to call them, but there's small shops all over the place that will come undercut you on price, you know.

--- *Customer engagement* ---

DAN

15:34 So if that was the only way to keep customers to go low, right? Then nobody would be in business thing, you know, so obviously you guys have been able to maintain those client relationships through your like you said expertise and the value that you're bringing them. So you mentioned transparency like customers as well.

--- *Forms* ---

DAN

15:52 How, what are you communicating to customers? It, I mean, typically, it's like reports, inspection forms and stuff that they need from you. I'm curious if there's any tools that you use or if that's mostly just like emails, PDFS, that kind of thing.

JASON

16:07 Emails, PDFS, the state of California supplies. I don't know if you're familiar with California as forms, but they supply the forms. So we're usually sending emailing PDFS back and forth.

DAN

16:20 Okay. Have you ever looked into like inspection software or anything? Because I know you said you've been using what you're on right now for quite a while. When was the last time you kinda took a look at something like this?

--- *Forms ends* ---

JASON

16:33 Been a few years?

DAN

16:36 Okay. Cool. Well, is there anything else, that you would want to mention to me before we jump into it here?

JASON

16:45 I wanna see kind of how this, how your solution works. You know, how it looks and how it works.

DAN

16:52 Excellent. Well, I am the person that can show you that. So let me, so I full disclosure here. Jason, I got a Mac book and I've been a windows guy for talking about my computer here. I've been a windows guy for, I mean, ever since I was a kid, really got my first Mac book and I started using it on Monday, I've gotten pretty dangerous with it. But if I make a, if I have some trouble with my screen share or something, I do apologize and thanks for your patience.

JASON

17:22 Yeah, no problem.

DAN

17:23 But you should be able to see company overview here, service, right? Yeah. Okay. Excellent. So just a quick, a little bit about us, and, you know, what we're built to do and then we'll jump right into the product walkthrough your job and such.

--- Customer engagement ---

DAN

17:37 But so so really for service trade, the core of what we're looking to improve and help you all with is controlling costs and growing quality revenue quality rather than quantity, right? With, with the amount of demand for your service for find the right clients and develop those clients and long term customers like you were mentioning, but improving your service project, operations, giving technicians and really, the folks that are dealing with customers, right? Giving them the tools and information they need to be as successful as possible, and then presenting, your brand to the customer, right? The way that you're communicating the way that you're organizing and doing service to them, growing profitable, customer loyalty. So.

JASON

18:26 I do, Dan, I do have a question.

--- Customer engagement ends ---

JASON

18:28 I'm sorry to interrupt. I do have, I do have a question. You get to talk to a lot more of my competitors than I do. What is, what is some of the common pain points that my competition typically has?

DAN

18:41 Yeah. Well, well, the biggest one right now, and honestly, it's I was quite surprised to hear you say that you guys weren't dealing with it. But, the biggest thing that folks are dealing with and pretty much that I talked to, is a labor shortage, skilled labor shortage. And because like you said, you know, folks, that work for fire protection contractors can't just be anyone off the street. Not only do they have to have your certifications but then again, you've got to trust them. You've got, they've, got to be good at their job. Well, they got to be able to deliver. So, the labor shortage is something very serious right now. So everyone's got pretty much, the thing that I hear folks say to me the most is they've got more work than they can handle. So they're just trying to figure out a way to get more work done.

JASON

19:30 So, the, their employees or what they're leaving for other fire protection jobs, or are they being poached for other industries?

DAN

19:38 A lot of, I mean, it's both. I think probably less though other industries I would expect once you've got, your fire knowledge, and certifications, I would expect that most of the time it's coaching, and so somebody offers them a couple more bucks or maybe a couple more benefits, better benefits than then they jump ship immediately. I've actually talked to folks that have literally met with one company six months later, met with another company with the same person.

JASON

20:07 Wow. Okay.

DAN

20:08 It's funny. So, the, and a lot of times, you know, technicians are leaving, or going somewhere else because of... things like folks are still running on paper inspection forms for example. And it's like, hey, I'm tired of the paper clip board. I see my buddy over here. You know, a friend of mine, he's working off of, you know, his tablet. It's much easier for him. He's able to see all the... revenue that's come from inspections. He's run things like that.

--- Paper process ---

DAN

20:39 They give them bonuses on stuff like that. So, I don't know... software and attractive tools for technicians sometimes is what I hear is as well for why they might jump ship. Okay?

DAN

20:56 But yeah, I was like a little bit... a little surprised to hear you said that you weren't dealing with a text shortage, but that's something that most folks are mentioning to me.

--- Tech time tracking ---

JASON

21:08 I think it's the union thing. Okay? There you go.

DAN

21:12 Did you say, and I'm sorry, go ahead.

JASON

21:14 All my guys have been with me for over 10 years, so, and some of them started the apprenticeship program. The union apprenticeship program is a six year program. So even one of, my foremen was a non union inspector for me when we were non union on inspection and 10, 15 years ago.

--- Tech time tracking ends ---

JASON

21:32 And then he went through the union and now he's one of my Foreman and runs my projects. So, okay. And we've been working together 15 years. So I've got my workers. None of them are new and none of them have the only guys that leave retire. So, I think it just, and they're paid really well. I think, you know, my labor rate for union technicians, 216 an hour. So, you know, we have no problem and the union has no problem finding qualified applicants. So maybe that's really the reason for the big difference is I'm using union workers and that are highly skilled and highly trained. And a lot of my competitors that you're talking to just use people with certifications.

--- Purchase decision ---

DAN

22:18 Yeah. And, you know, I speak with folks on union as well, though, but you're giving me a lot of clarity on how that works. So it sounds like that was one of my questions but I think you already answered it. Everybody's been with you for a long time.

--- Purchase decision ends ---

DAN

22:29 So, I was thinking, I mean the question was like is the union providing kind of a new set of guys, you know, every six months kind of thing? But it sounds like that's absolutely not the case, that you would up with qualified candidates and then you hire them, and maintain them or?

--- Pricing ---

JASON

22:45 That's right. Right there's. There's there's an apprenticeship program. So you get, you know, less costly help on projects as, they serve, they are their apprenticeship and their apprenticeship is six years. So, you know, it starts out a really cheap employee, but, you know, over six years, they get regular pay increases and the big ones are at the end when they become journeymen and turn out after six.

--- Pricing ends ---

JASON

23:09 But we get, you know, if I want a fresh body, a green guy, to hand pipe to my fitter, you know, I can do that and I have access to that cool every six months. So those guys are, there is an influx of new blood, new apprentices, and if they turn out in our program, we don't always put them in a truck, right? We don't always have, the workload for additional guys. So usually we turn them out and they go to work for a competitor which is great, you know, just it's great. So anyway, so there is a new influx of new blood and there is a transitory part of that the core crew, all the Foreman, all the project leads are always the same.

DAN

23:53 Gotcha. Okay. Well, yeah, that makes a lot of sense. And I appreciate. I'm, definitely learning quite a bit here. So thank you. Sure. Dan, how have you been doing this three years now? Coming up on three years?

JASON

24:05 Okay. So since COVID?

DAN

24:07 Exactly. Yep. All right. Yes, sir. Cool. Well, let's see. So I'm gonna jump back into it, if that's cool with you. Yeah.

--- Purchase decision ---

JASON

24:19 Perfectly fine. Yeah.

DAN

24:20 And Jason, feel free to interrupt me at any time. I definitely like keeping this like more like a conversation. I don't want to be talking at you. So feel free to jump in. Alright. So, so the profit platform, you know, peeling back the onion a little bit, how do you get there, right?

--- Customer engagement ---

DAN

24:37 How do you grow that profitable customer loyalty? So this is kind of the wheelhouse for service trade. So this is essentially different sections of your business and how we help with that. So improving your service project operation simply about giving the people in the back office visibility and processes and workflows that makes sense for their job duties and help them get more done... for your customers and set the technicians up with the information that they need.

--- *Recurring maintenance* ---

DAN

25:08 So visible the jobs that are ongoing labor needed. Who's qualified to do that type of work, customer equipment and such scheduling, routing, understanding where your work is, upcoming, recurring services inspection, due dates, that type of thing... for technicians, the mobile application, right?

--- *Forms* ---

DAN

25:27 So that's going to bring together everything that they need. So whether it's the inspection forms that you're talking about, the aes forms which I've actually got one loaded up today that they will walkthrough filling out a couple of different options for those.

--- *Customer engagement* ---

DAN

25:40 But those will be included with the application here as well. Everything in one place for the tech simply just helping them get more done. Their job is hard enough on its own. So we don't wanna make recording the information or finding information that they need... another job in itself, right? So pictures videos, notes about, equipment history, job history, customer information, all available to the technician, keep them focused on the job... and really where service trade differs from a lot of different service management platforms. Again, is that connection to your customer, right? So we do offer something called the service portal that's basically the way that would work is you'd have a log in square on your website where if you offer the customers the portal, then they could log in and see any previous jobs, upcoming jobs, service history, any inspection forms available for them to download 24 seven outstanding quotes, invoices, but make it really simple to do business with you. And easy for the customer to get information from you.

--- *Deficiencies* ---

JASON

26:48 Now, can they request services from that portal?

DAN

26:51 They can thank you for calling that out because that's forgot to mention that, but yes, they can.

JASON

26:56 Actually then come to the portal and say, hey, I have a leaking sprinkler head. Can you resolve it?

DAN

27:01 That's correct. And the way that service trade tracks equipment as well, the customer could just say, hey, I have a leaky sprinkler head at building a, right?

--- Assets ---

DAN

27:10 But if they were smart enough to understand where that leak was coming from, like if it was obvious, then your equipment is also the assets, right? You're going to be available to them. So they could say at the sixth floor in a hallway B, or however you labeled that equipment. And so, you know exactly where it was when you headed out.

JASON

27:30 You bet it would be optional for the client to input that information.

DAN

27:34 Essentially optional. I can kinda show you what it looks like. Basically, they can either select the asset based on what you've named it or they can select building, which just means it's generic, right? And then you all would assign it to an asset when you get there. So if they're not sure what's going on but they know they have a problem, wanna make it easy for them. So they can just select default building.

JASON

27:52 Can you, the term assets confusing me? What, what is an asset?

DAN

27:57 It's customer equipment that use service?

JASON

28:00 Customer equipment. So sprinkler system would be an asset.

--- Customer engagement ---

DAN

28:03 That's correct. Okay. This is a sample of a service report. I'm gonna be sending you one of these today, but I can also be used as like a work in Progress report showing any upcoming appointments, completing appointments, and what you've

done so far again, just relaying to the customer the value in doing business with you guys, and the work that you're doing for.

--- Customer engagement ends ---

DAN

28:30 So the really the one of the probably the reason our customers stay with us and what everyone likes about our platform and why we've been able to grow. It just comes down to increasing revenue from quarter work. And I understand that you guys are operating on a high cliff with that right now.

--- Customer engagement ---

DAN

28:46 That's fantastic folks tend to see an increase even when they have a good process which actually lines you up better for this platform, right? We're not here to fix broken companies. We're here to give good companies tools could be even more successful. So service trade and we're gonna walkthrough this process today.

--- Deficiencies ---

DAN

29:04 But basically your deficiencies gonna give you a really clear view of when those come in... and the information you need about that deficiency included with audio clips, videos, pictures, previous information, service history about that equipment, get a quote to the customer within a few clicks. They can approve with one click or request changes.

--- Deficiencies ends ---

DAN

29:27 And it's gonna give you visibility as well to how your customers interact with the information you send them. So sometimes like you mentioned, right, there's not a need for follow up sometimes. But... if you did need to, you'd be able to see, hey, is this customer even looked at it?

--- Deficiencies ---

DAN

29:42 Have they opened it? I can run a report last week. I send out 40 quotes, how many have not been viewed yet, right? And then just prompt a follow up email to go out, get it back to the top of the inbox that.

JASON

29:53 So when it comes to deficiency, let's say a guy in the field, I've distributed his it and paperwork, he goes out and he finds a painted sprinkler head. How does he input that as a deficiency in your solution? A?

--- Deficiencies ends ---

DAN

30:10 A great question. And that is pretty much what the entire demo is going to be about. So if it works for you, I think I've got one more slide here and then we'll just jump right into the work order if that works. Yeah, yeah, great. Okay. The last thing, to point out here is just the way that service trade is going to organize your data and our data model will help you to really see... basically where you're performing well, where you think there might be some more opportunity, and what values you know, at for example, the different types of work you're doing right?

--- Customer engagement ---

DAN

30:44 Your windshield time, how long are your text driving versus on site work orders with opportunities, right? Just allowing you to visualize your performance and make adjustments where you feel like you could.

--- Customer engagement ends ---

JASON

30:57 Now, where does this information come from?

DAN

31:00 This is all collected just through the workflows in service trade. So it comes from, the...

JASON

31:08 So, who's inputting that information into the platform?

DAN

31:11 You guys are?

JASON

31:13 Okay. So we're inputting the value of this work order. Is this amount?

DAN

31:20 Well, I mean... yes, I mean, it's gonna do your margin, your cost for you as well. Okay? Did I answer that question? Okay?

JASON

31:34 Yeah, I'll just, I'll keep watching.

DAN

31:36 Okay. That might have gone a little over my head, but it might be explained a little bit when we walk through it. So feel free to circle back on it. Okay? But we have been in business for 10 years, Jason, we did start specifically in the fire protection space about five years into it. We branched off, and now we work with mechanical and fire protection contractors, but our platform is actually designed specifically for fire companies over 1,200 accounts across the us right now. So that's just a little about us. Does this so far? Sound intriguing to you still or?

--- Customer engagement ---

JASON

32:14 Well, it's no different from what we're currently doing there's. There's so far that there is not any sort of competitive advantage to your software solution to how we, how we're currently managing it.

DAN

32:24 Okay.

JASON

32:25 But I guess there's value in knowing that, so, which is okay.

DAN

32:30 As far as like the customer portal, and online service reports like that. Is that something you guys are already offering?

--- Customer engagement ends ---

JASON

32:35 Yeah. I mean, we're distributing these work packages online, the fields already submitting them back to the office through the online tool, right? We're already, right? Yep, this is really no different.

DAN

32:51 Okay. I guess what I had understood earlier was that it was like PDF is getting sent back and forth.

--- Forms ---

JASON

32:58 No, it's a work package. Now, we were required to use the PDF because it's California aes forms. So you, I know in other jurisdictions, other states, you could create your own form, or rather populate a software to fill out deficiencies and stuff. But for the state of California you can do that. But ultimately, it has to be populated on the appropriate aes form. Okay? So, those are the we're sending back and forth.

DAN

33:33 But it's kinda, it comes in like a packet so that's not like an email that's...

JASON

33:37 It's not an email. It's a software solution just like this.

DAN

33:42 So it's like a mobile tech has like a... interactive like packet, that gets.

--- Access to information ---

JASON

33:48 Portal. Yeah. So the, so the guys have the ipads and, they log into a website, mobile tech tool, dot com that has their work orders just like this with attachments and they can look at their existing week and day month year, all that stuff, and then use that as a repository to communicate back to the office. Yeah, including a repository for PDF documents or timecards or anything like that.

DAN

34:17 Gotcha. And so, they, they're logging in. So it's not a mobile app. It sounds like it sounds like they're logging in like on their browser?

JASON

34:25 Is a browser? Yeah. Okay.

DAN

34:27 So, something I hear a lot of the times with applications like that, is that when they go into basement or have bad service, things can get glitchy and get lost. Is that something that's ever come up for you all?

--- Access to information ends ---

JASON

34:40 You know, there are basements when we do like fire pump performance testing, but, the, but they're never really submitting the report from the basement. You know, they perform their work and typically go to their truck. So, there are times where, you know, it's a little spotty in an area that they especially California with all the hills and stuff. So sell data isn't the best, but it's not that big deal and doesn't happen all the time.

--- Access to information ---

DAN

35:05 Okay. Yeah. So this is the work order in the office side. I'm gonna go ahead and jump straight out to the field for us and we'll watch as the information comes back to the office view if you will. So that would be for, you know, your folks at the office to

complete that package, get that information together, and run it by your quote, that kind of thing and take next steps. But let's jump out to the field. This is the mobile application for the tech. And so you'd asked earlier about how does the application report deficiencies and such? How are you guys doing that now? Is that just through the PDF and then the office is running through the PDF to take a look at it.

--- Tech On-site ---

DAN

35:43 Yep. Okay. Gotcha. So for your tech, they're gonna punch into the work order here first and foremost and they're going to send out a notification if they'd like to really up to you to be honest, but can be nice to put your brand in front of the customer, right?

--- Tech time tracking ---

DAN

36:02 In, another way to interact with them that's not just the Bill or an invoice. It's also going to give the office real time visibility on when Dan's on the way to the job and when he arrives and again, starting that data collection as far as drive time versus on site time, right?

--- Assets ---

DAN

36:21 But I'm gonna clock in, at the job site here pretty straightforward layout for the technician, the services that I'm here to provide the assets for those services. So we got two sprinkler systems. Now, if I wanted to look at all the equipment or assets that is at this location, I've got all the information here to do. So ServiceTrade is gonna section it out up there. As far as at this appointment, we're just here there for us inspection on these two sprinkler systems. Now drilling down a bit further service history can go and look at all the previous jobs that were completed. Including, you know, who was there? What was the, any job items that were used? Paperwork? Any information, attachments pictures on those jobs? So I've got that available for me more specifically, I can also look at all the deficiencies, it looks like I've never logged deficiency here. Excellent. So this, I think the other asset has one.

--- Deficiencies ---

DAN

37:23 Let me go grab that other one. There we go. Yeah. So if I look back at an asset, I can actually see the history of all deficiencies ever recorded here. And if you all have not repaired them yet, then they'll remain is open. So you'll see verified here. If you look over here on the left or on the right, if we look at everything, so you can also see fixed. So heading onto a site, you can see it looks like we'd reported some deficiencies here last time and those have not yet been repaired... and attachments on the equipment level as well.

--- Assets ---

DAN

37:58 Any information that you want to specifically note about this equipment can go ahead, and add it directly on the equipment level. It could be a PDF guide, video, audio clip, photo, what have you? And then of course, the make model, serial number, and you can get much more granular with the information that you want to fill out here on your asset.

--- Forms ---

DAN

38:18 That is entirely up to you. You can leave it more simplistic. But the more information you fill out, obviously, the more useful it can be when auto filling forms and stuff.

JASON

38:29 Well, is there a way that this self populates based upon, a pre filled form?

DAN

38:38 So based upon the equipment that itself populates the asset?

--- Forms ends ---

JASON

38:43 The, the deficiency. So, for example, we can't use this and this data California, this is, this wouldn't make sense for.

DAN

38:50 For us. Gotcha. So we do have 100 customers in the fire protection space in California like ages, I know. And there's somebody close, I think they're close by to you, right? Ages, ages yep.

--- Forms ---

JASON

39:06 Yep. Yeah. They're not really a direct compete.

DAN

39:09 Okay. So there's two ways to do the forms. So to get to your question, right? Because I know it's very specific in California as forms. So option a is PDF. So this is very similar to exactly what you're doing now, right?

JASON

39:23 Yeah, yeah. Okay. Yeah.

DAN

39:25 So the PDF and what we're gonna do is we'd set up rules for your PDF. So based on the type of service it is or the customer, a lot of different ways you can set up the rules. But essentially, the point being you get the correct form on the work order and the tech doesn't have to look through a library of forms, not that they wouldn't be able to find it, but just make it easier, right? So they automatically dispatches the correct form for them and it is going to pre fill that information here. So let's see.

JASON

39:51 So if I go in, and market it fail here, let's say if I mark, fail an automatic sprinkler system and I go to the next page, which would be that for a sprinkler systems... would it all right? So, so now I go in and I say one point nine, and the next form, this is only the cover sheet. Do you have the actual form for?

DAN

40:13 I think I just added the cover sheet here. Let me, let me grab the other one real fast.

--- Forms ends ---

DAN

40:23 I think I got it. I've definitely got one that's more than one page. Not here we go. It should be the one.

--- Forms ---

DAN

40:40 This the same thing that I just pulled up.

JASON

40:42 Yeah, it's an as one that's just a cover sheet you're looking for like an ads two point one.

DAN

40:50 Yeah. I know. I've got one that's multiple pages, the as.

JASON

40:54 Yeah, just some multiple pages where we can mark deficiency and does it once you mark deficiency. And now you can put something in the box. Does it grab that deficiency? Does it scrub the form for that deficiency and populate it into your system?

DAN

41:12 So it does not. And so here's the workflow. If you were to use the PDF and I'm still trying to find that it could be possible that someone... set up different rules. And

this is the only one I got available to me right now. So... either way you'd have the form you were looking for there and you would just scroll over typically to the next form. So the way that they would work currently, the way that they would do that if you were using the PDF and then we'll take a look at the other option as far as the... service forms is actually, it'll do exactly what you're talking about. When they notate an efficiency, it's going to create a record of an efficiency. It will scrub the form right? And create a report that you can easily convert into a quote as well as the document that you need for state regulations and all that.

JASON

42:06 Will cost you that information. So if I go through your little web form here and say deficiency sprinkler will it populate the PDF with that deficiency?

DAN

42:17 That's correct. Yep. So it's so it's either do it on the PDF and then also do this manually right here, which is a really quick process.

--- Deficiencies ---

DAN

42:25 So you're popping back and forth right? When you find it efficiency, you say paint a sprinkler head... go to the next one. It'll prompt you to go ahead and take photos, which I'll go ahead and do. And I can add notes there if I need to. And I'll add a quick video. And I wanna also show you, the form portion of this.

JASON

42:48 But will it take that deficiency you just took and populate it into the California form? It will. Okay.

DAN

43:02 So get my video up here. And so it's a different route though to do that. And so you mentioned earlier, right? Different... severities. So this could be suggested like you said, or actually deficient.

--- Assets ---

DAN

43:20 And then, and operable. So there are settings for that right there. It's gonna prompt them to select. And then the asset, you can just scan, a bar code or whatnot, or search serial number and go ahead and select your asset. It will automatically identify what type of equipment it is.

--- Assets ends ---

DAN

43:36 And I'm just gonna mark this as new and save and that's it. And we'll see how that comes through to the office here in one moment. But I do wanna pop over and I

wasn't anticipating showing service forms, but I think I can pull this up for us real quick.

--- Forms ---

DAN

43:52 The other option of forms that we have that will do what you're talking about, right? Where they answer questions. This is the two point two of your inspection, right? So this is where they go in and make their comments pass, fail... go through this questionnaire. And what comes out on the other side is the form that you need, exactly how it needs to look.

JASON

44:19 Wise, you're marking it as a deficiency with an asset, and then going in here and filling out this form, which is just a translation of the.

DAN

44:27 So it's one or the other, right? So the first option is do the PDF. And then you would go through and do the like the little video process when you wanted to recorded efficiency as well as obviously typing it up on the PDF. This way with this form, you eliminate the both of those processes. So forget about filling out the.

JASON

44:47 You doing it twice, you're doing the same thing twice. How do you mean? Because you're filling it out in? I don't know what you call the previous module where you mark the deficiencies, and then you're also filling it out in this SK demo, whatever this is called, and then taking this and then populating the PDF. Yes, but you're filling it out twice, you're filling it out and your traditional module, and then also in this one, right?

DAN

45:13 No. With this, so, let me roll back here. So with what we call this product is service forms. So this eliminates the need to go through this deficiency step here where we just solve our added efficiency and did a video and all that service forms is the more intuitive way to do the inspection forms. A lot of folks are moving to this because exactly the opposite of doing double entry or any cross back and forth, right? It's gonna take care of populating a PDF to state requirements as well as identifying those and scrubbing those deficiencies so.

JASON

45:51 So the service forms is a separate module on top of your typical product.

DAN

45:57 It is the way it would work though, is for this inspection, for example, when, the technician clocked in, they would get a drop down bar right here that dispatched the correct form that they needed. And so when they click that drop down, it would pop them over to this form. So again, based on the customer information could pre fill, so

assets and such. And I think with, the two point two, you've got, the problem found section at the bottom. So that's the way they would be adding a deficiency.

DAN

46:32 Efficient. And then you've got your selection here. Again. So again, you're not going to have to do the other portion that we just looked at. If you had service forms, this would be the process for doing that.

JASON

46:46 So the California forms have really challenged your business model. I would guess.

DAN

46:53 Yes and no, it's I think we have the most customers in California.

--- *Forms ends* ---

DAN

47:00 I mean, it's a big state too that that's probably part of it. But, but I mean folks were, I think the forms have challenged contractors as a whole, the regulations on them and they've been looking for tools to help with that, to be honest with you. But yes, they can get complex there's. Definitely a lot of work that we put into... making sure that these work.

JASON

47:26 Yeah, for sure. It's a lot easier, if you don't have to follow a specific format and you create your own form, you have a lot more like in other states, a lot more discretion on doing things the way you want. And, and a lot of the, a lot of the software solutions are of course geared to that because that's the biggest use case scenario. Everyone's has the flexibility, to report things any way they want as long as it's reported in some way. So.

DAN

47:55 Yep. Yeah. And it's I think there's a good and a bad to that though it's kind of like a, when everybody's doing it their own way, there's no... kind of one row if that makes sense. And people can get, they can miss stuff and, they can mess themselves up with this.

--- *Forms* ---

DAN

48:12 At least there's an expectation because actually after spending years, you know, and I know that they just made some adjustments, or about to release some adjustments, I think on the aes forms which we are, you know, prepared, to release alongside of them. But... the, what we'll find is a lot of folks are asking for all these custom forms when it's like because we've got a library of forms as well. So we've got the California forms. Then we've got a library of forms that work for most other

companies across the us that don't have such stringent regulations and are aes right? But what we found is people are they'll have a lot of like kind of wild... needs if you will or request, and it makes it really complex to build a form when.

--- *Forms ends* ---

JASON

49:00 It seems work you everybody got.

DAN

49:02 Actually work, right? But at least the, is set it up where it's a standard. It's like, okay, this is exactly what it is and it's very clear, right? So let me pop back over. Let me open up the.

DAN

49:22 And here comes, my Matt. Troubles.

--- *Forms* ---

DAN

49:32 There we go. All right. So pop back over to the job here and actually wanna pop in before we take a look at the job since I didn't have that particular service form rig setup... gonna show you the library of as forms that we've got.

JASON

49:52 Well, I would guess you would have to have all of them.

--- *Forms ends* ---

DAN

49:55 That's correct?

JASON

50:01 Yeah, I'm on the code committee for state of California. So I'm pretty with all is.

DAN

50:06 You know, by chance, Jack co.

JASON

50:10 No. Okay. He's not on, no.

DAN

50:15 Okay. I don't think he in the California, he's on the... I hate to say it, but sometimes I think it's 25 or he's on one of the nfpa committees.

--- *Forms* ---

DAN

50:27 Okay? But, a lot of folks are familiar with him. So I figured I just name drop in to see if you happen to know.

JASON

50:35 No, I'm on the committee that's determining the 25 adoption for the state of California, and then also on a sub committee that determines how we want the forms to be changed. So, so that's very much in my wheelhouse. But yeah, there's significant changes coming down the pipe, on the aes documents on the PDF.

DAN

50:55 Yeah. We've got someone I know that's working very closely with that committee to make sure that the day that their release, like we're ready to go with our as well because the PDF are obviously that's pretty simple. But as far as with, the smart forms that we were just looking at, where it's kinda more of a questionnaire that populates the PDF. Those are a little bit more complex to make sure they're in line. So.

JASON

51:17 That's what the smart forms, yeah?

DAN

51:20 Yeah.

DAN

51:37 So I can send you over our form library. If you're interested in taking a look. The, the main point was looking at to get across really is that... and I think you understand this that it would be, even though it's like a questionnaire on the application, right? It's going to populate and spit out a PDF form for the determined as form, or whichever form or inspection you were doing to the work order here, I get it. Okay. And the deficiency also, right? So, so it's like you mentioned it's going to with the service forms. If you're not doing the PDF, right? If you're going through the service forms, it will also scrub and identify deficiencies. And the benefit to that is you're able to take a look at the details of this deficiency.

--- *Deficiencies* ---

DAN

52:22 We've got our attachment here. It will also show for example, previous deficiencies if this has been a common issue over and over at this asset. But all the information that you need to go ahead and add to a quote.

JASON

52:36 Are you always starting with a new form or is there a way to distribute the last form too?

--- *Recurring maintenance* ---

JASON

52:43 Like, you know, let's say we have three quarterlies in an annual and say we do the annual today and three months from now, we're due for another quarterly. We dispatch that, to the technician and does the technician get a copy of the annual if we so choose or did they start fresh with a quarterly with new quarterly paperwork and then have to do research to see if there were any open deficiencies? So.

DAN

53:09 They're gonna get a, they're gonna get both really is, the thing. So the... roll up here. So you see here the frequency, this is the app again and I'll minimize this. It's not distracting but quarterly annual, five year. So they have access to all those forms. If it's a quarterly, it'll automatically select that forum.

JASON

53:32 Yeah, but that's not my question. My question, is if the annual was done previously and I'm coming in to do the quarterly, does that previously because, you know, the annual is kind of the whole scope and the quarterly, is a minor scope. So there's a few things that I'm gonna touch on the quarterly that already were touched on the annual. Does that, does he automatically get the old report that shows the results of that annual? And then?

--- *Forms* ---

DAN

54:02 Is that how you would like it to work?

JASON

54:04 That's how it works now?

DAN

54:06 Okay. So a lot of folks are, so to answer your question, yes, your technician is going to have any form, any inspection form. They're going to have access to every, the entire history of that site, any job that has ever been completed there, they'll have deficiencies on it inspection forms filled out all the way, all of that information with service forms. It is possible to pull in the answers from the previous inspection and have them auto fill. That way the technician can just go through and mark what's different can also set it up what some people will do because you can do a lot with, the service form side of things. What some people do is mark everything is passed and the tech goes through and marks only the things that are failing. So kinda play with it and do what you like. But specifically with like the quarterlies because I know

isn't there one of the sheets that at the end of the year, right? It, it shows kind of a report from each quarter. And then the annual, is that right?

JASON

55:02 There's the, on one of the forms, there is a check box that is intended to capture a year's worth of service at different intervals and annual and three quarterly. So, the intention behind the box is, so when you deliver your client, they can see there's been a record that's the intention, but it's not always right? Done that way but that's the intention.

DAN

55:29 Yep. So you can also have that those fields pre populate based on the previous inspections, if that makes sense?

JASON

55:38 All right. And you could set up, as a default standard.

DAN

55:42 That's right? All right.

DAN

55:47 And then as far as like open efficiencies, so they'll have access to the report and if you want it to pre fill, the last reports information, it can, but you can also, those deficiencies are going to be right here, right? So if there's anything open or fixed, they're going to be listed in chronological order and...

JASON

56:05 The, these are listing individual deficiencies, right?

DAN

56:09 That's correct. Yep. Okay. So you can also look at it on the form like you mentioned, but you can also look per asset, right? So if I'm here for a sprinkler system inspection and I want to just look at the deficiencies that are open on that sprinkler, excellent, we don't have any open ones.

--- Deficiencies ---

DAN

56:26 And again, I looked at the one that didn't have any deficiencies, but I think you get the idea here, they're pulling up per system or per asset, what types of efficiency we've had, and what's been fixed recently. All right?

DAN

56:44 Right. So taking us back to the office side here as far as generating a quote from those deficiencies, and really where, our product helps you manage these. So this is

the deficiency that just came in and I can generate a quote from it. If this were to be needs to be multiple deficiencies, can go ahead and add service or efficiency if it's an existing one. Looks like we've got a couple or select multiple, right?

--- *Quote templates* ---

DAN

57:12 And select all. So if I wanted to grab all the efficiencies from an inspection, something like that could easily apply them all for one quote and you'll have a library of templates that you create and you can create as many as you'd like to. So for a painted head, I'm sure that's probably a common issue. I'm gonna go with the corroded one though because that is a little bit more descriptive. So this is a description you create, right? And once you create these templates, you just apply them whenever you need to. And you're not gonna be locked in to the cost or the price here either. So the template, hopefully, it does get you most of the way there. But understandably, you might have an adjustment or maybe you need to add something. You're not locked in. It's not gonna box and I'm gonna make a couple of adjustments. You can see here also that our standard contracts being used and you'll notice the markup for that currently gross margin 44 percent.

--- *ST app contracts and pricing* ---

DAN

58:04 If I change the contract and that's the pricing rules for the customer, you'll see the markup changes. So you can assign customers these mark up rules and these contracts so that if some customers, maybe they've been with you for 10 plus years, right? And they are sort of grandfathered into a rate or maybe they have signed up with a five year agreement for, you know, and they get that pricing.

--- *Quote templates* ---

DAN

58:26 You can assign them different markup rules... based on the customer based on the type of service. What, what have you... as far as like a detailed level for the customer as well? You'd set up your default and that's how it would automatically be. But you can make adjustments if needed.

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

DAN

58:46 So fine items is grand total. Only for example, if you're not looking to give a description of price on every single item for the customer that's a popular one. And that's it, we're ready to send this out to the customer. You've got, your Bill to and shift to contacts for the customer location here up top and looks like Jason, you're the primary contact, so I'm gonna get that out in front of you?

--- *Quoting* ---

DAN

59:16 All right. So that'll hit your inbox any moment?

DAN

59:28 Any thoughts on that process and how it compares to, is that still sort of, the same thing?

JASON

59:33 Yeah. I mean, the way you're the way you're executing is slightly different, but it's substantially no different from how we're currently managing this and you're just and you're using the data that populates here from, the quote to track your deficiencies, your conversion ratios, and your margins, all that stuff.

--- Quoting ends ---

DAN

59:51 That's right? Yeah. And so... okay, so it does it look like this would be much of a value add? Is that what?

JASON

1:00:01 No, there's doesn't seem like there's any benefit at all so far that anything I've seen doesn't help streamline our process in any way. Doesn't there's no. So there's no advantage just yet that I've yet seen. Is this the extent to the functionality of the software?

--- Quoting ---

DAN

1:00:18 I mean, service tray can do quite a bit. This is if this doesn't resonate with, you know, if you feel like this is the same as what you got now, I mean, typically, this is a sticking point, right? And the next step would be, you know, taking a look at all of your open quotes, all of the quotes you submitted, what status they're in. So maybe you wanna look at all drafted quotes, like you mentioned, your folks right now are sending them over to you to review before they're going to the customer and you're bumping them back to them. So, hey, you just have a process where you're running a report for all drafted quotes by your people and you can go ahead and take a look at all of them right here and mark them to the next step.

--- Quoting ends ---

DAN

1:00:59 So that might be helpful. But, you know, I'm not really sure. It sounds like you guys have got something in place that you're pretty happy with. Yeah, we are... okay. All right.

JASON

1:01:12 So that's it. All right. Okay. I was, I think one of your competitors has a ti module that helps manage the, I think it's BuildOps. I'm curious to see how that

works and how that functions, but this looks like it's really just it related activity.

DAN

1:01:28 Yeah. So I wanted to before we went here and I know that like we're probably running up on an hour which is what we had scheduled. So, so it sounds like you're looking into making a change or, yeah.

--- *Customer engagement* ---

JASON

1:01:42 It depends if the arguments compelling.

DAN

1:01:45 Okay. Well, honestly, I'm not here to argue with you. Definitely here to present what we have and if it lands with, you know, something that looks like it would provide value to you then fantastic, but... definitely not here to argue. But I also don't want to make this seem like it is only for your items, right?

--- *Type of work* ---

DAN

1:02:05 Service trade. And I pulled up our web page here. We provide a lot of different services, right? And we work with companies that are doing projects, Construction work, service, this work, inspection work... the whole nine yards, right? So there's a lot that our product can do. You know, we'd probably be here for days if we were to walkthrough every workflow.

--- *Purchase decision* ---

DAN

1:02:30 I'd be happy to put some material together for, you know, some of, the project work or ti if you would like. And something I typically do after meeting with someone is, I've started to create this workspace. You let me know if it intrigues you at all to look at this any further and I'll build this out for you and share it with you. What do you think? Yeah?

JASON

1:02:51 Again, I haven't seen anything that looks compelling. So, okay. Yeah, I guess that's where we are. I do appreciate your time. I appreciate the feedback that you provided, sure it's always good to keep things in mind if you guys have like, you know, another version of the software that comes out that allows you to significantly do something that you're not currently doing. I'd be interested in seeing what that looks like, and how that works. But I think where we are right now is our current process works just as good as this. So there'd be no reason to change.

DAN

1:03:30 Okay. Well, yeah, Jason was great. Meeting you as well. So did I hear that correctly? Though there's no reason for me to put this together for you to kinda.

--- *Purchase decision ends* ---

JASON

1:03:39 Yeah, I wouldn't want to waste your time. It's all right. Don't worry about it.

DAN

1:03:42 Okay. Well, feel free to, you know, I will mention and I know I've mentioned a couple of times but again, we work with a ton of fire protection companies in California and a lot of them, the average increase for our customers year over year is 37 percent. So it sounds like I didn't necessarily do my job today, but our platform, I was born in your industry. So, you know, if you're continuing, to look into software, I'd keep us in mind, don't just, you know, it could be just the salesperson that messed it up for you today. So take a look at our website, you might find some useful information there, but I'm always happy to connect with you. Again. I will shoot you over just an email just so you got my contact info. But again, I appreciate your time.

JASON

1:04:30 Yeah, no worries. Thanks, Dan. I appreciate your time.

DAN

1:04:32 Yeah, have a great one.

The End