ServiceTrade Demo with Turner Mechanical Inc

Alec Ashby with Turner Mechanical Inc
Recorded on 8/22/23 via Zoom, 1 hour 19 min.

Participants

ServiceTrade

Alec Ashby
Territory Manager

Lucas Meinken
SDR

Mike Thomas
SDR

Other

John Turner

Kate Turner

Topics

Transcript

--- Call Setup ---

ALEC

0:00 Hello?

JOHN

0:02 Hey, Alec. Hey.

ALEC

0:04 Hey, okay.

JOHN

0:05 How are you?

ALEC

0:06 Nice to meet you. Nice to meet you. How are you?

JOHN

0:08 Doing well. How about you?

ALEC

0:11 Doing good, doing good. And is it just you today or is anyone else joining?

JOHN

0:15 No.

JOHN

0:15 John?

JOHN

0:16 My husband is here and then Jackie Sullivan, who is our office manager and who, you know, really does most of the dispatching and billing for our jobs, is just about to step in the room here. She is, this is Jackie.

ALEC

0:34 Hey, nice to meet you, Jackie. It seems a fun world isn't it.

JOHN

0:38 Yeah.

ALEC

0:41 And then, I'm assuming that Kate, you and John are kind of tag to you're. Both owners, right?

JOHN

0:47 Yeah, yeah. Yeah. I'm the one who's going to be running the meeting though?

ALEC

0:54 Okay. Totally fine. Well, if you want to get into it now, we can or we can wait whatever you prefer.

JOHN

0:59 Yeah. Now, let's get into it. Yup.

ALEC

1:01 Okay. Well, just to formally introduce myself, Kate, my name is Alec. I'm an inside territory manager here at service trade. I've been doing this for over a year now. So, essentially, the way these first meetings go is I just want to basically learn a little bit more about your business, some of the workflow issues you're having some of your goals, stuff like that. Once we get a better idea of that, we can hop in the platform. And then if it looks like something you guys want to explore further, then we can talk next steps from there. Does it sound good?

JOHN

1:28 Perfect. Yeah, yep.

ALEC

1:30 Cool. And if I actually call you John, it's only because.

JOHN

1:34 In...

ALEC

1:34 That...

JOHN

1:36 I...

ALEC

1:36 This...

JOHN

1:38 Yeah.

ALEC

1:38 I don't worry about it. I just, I was saying that just in case it does happen.

JOHN

1:43 Yeah.

ALEC

1:44 Well...

JOHN

1:44 Well, I...

ALEC

1:45 I was looking a little bit at the notes from Lucas who is the guy you spoke on the phone with, I believe about a week ago, learned a little bit about you guys, but really the main thing, I was curious to just start off this meeting.

--- Call Setup ends ---

ALEC

1:56 It seems like you got about five to seven install tech. You have two service techs, you're mainly interested in this for the service side and you want to grow the service side. So, I was curious to see what your kind of goals were for the service side. Is there any tech count that you guys are trying to get to or what kind of goals you guys have for that?

JOHN

2:14 No, right now, we have two, like I said, two service techs, we'd like to have a third, you know, right now, that would be the ideal number of guys doing service. Most of our revenue comes on the other side on the job Installation side, on the big jobs that we have. So, you know, we definitely need both, we need, you know, help with the dispatching and like customer maintenance because, you know, knowing our customers having the information on our customers because right now we really don't have that. We use a company called due forms and it really doesn't give us very much information. So it would be hugely helpful to Jackie as she's dispatching the guys to have information on our customers. You know, where the units are when the guys go out, what equipment they're gonna need for maintenance contracts... all of

that. And then, you know, on our, on the other side, and I'm not sure where you guys land on this with the jobs, the big jobs being able to do, you do like Aia Bill billing for big jobs?

ALEC

3:36 Yeah. So unfortunately, we don't do Aia billing.

JOHN

3:40 Okay.

ALEC

3:40 We usually tell our people to use pro core or something like that if it's that level of complexity.

JOHN

3:46 Yeah.

ALEC

3:46 What we can do is we can do owner projects. So if you have a lot of jobs where you aren't working with the GC and you own it and you just need to keep a budget or work in Progress stuff along those lines, we can handle that. But it seems like to me, you got it's. More of a new Construction than install. I know everyone kinda uses different terms of.

JOHN

4:04 It's not new Construction but it's you know, they're big design Bill, not design bills.

JOHN

4:12 What's what's the word I'm targeting?

JOHN

4:16 You know, they go with tenant interior work.

ALEC

4:19 Okay. Gotcha. Yeah, because we, yeah, we're mainly built for service and light projects. Aia billing. We're probably not going to be a fit for that. We don't do that. Now, I did see that you guys use you forms for those. Like what are you? Is that just for the text or what are you kind of using that tool for?

JOHN

4:36 Yeah, just for the tax, just for the ticketing?

ALEC

4:40 Okay. So, is that where Jackie's kinda going in there and dispatching in?

JOHN

4:44 He verbally dispatches them. Sometimes they dispatch themselves like they, you know, one of our service guys has been here since the beginning. He knows every customer and, but, you know, we don't have a good tracking system at all as far as being able to know when upcoming maintenance should be scheduled. We just kind of, you know, do it on our own. So being able to have that information at our fingertips would be really helpful.

ALEC

5:19 Okay. Yeah, we can definitely go over some of that because PM, PM management is definitely one of our bread and butter. I mean, how often would you say those jobs are slipping through the cracks or you guys are missing those jobs, maybe lack of systems or what?

JOHN

5:32 You know, I mean too much. I wouldn't be able to put a number on it, but, we, you know, I think we do a pretty good job, but we fall behind, yeah.

ALEC

5:46 Right. And with it being so hot this summer, I'm sure. Sometimes the phones start you.

JOHN

5:50 No, yeah. No, there's so many. Yeah, yeah, exactly.

ALEC

5:55 Gotcha. Okay. And then as far as how you guys perform on those PMS, I know a lot of customers I talk to, they really wanna make sure that they have a good pull-through workflow, basically meaning that when they go out to the PM, if they find a broken compressor, a bad capacitor or something along those lines, they want to streamline the process of the technician reporting the repair, that getting back to the office and then the office being able to quote it out.

JOHN

6:22 Yeah, it.

ALEC

6:23 Seems like that's a common workflow for you guys.

JOHN

6:25 Yes.

ALEC

6:26 Okay. How is that going now? Like how does that process work now?

JOHN

6:31 It's really hard because we're constantly following up with attack, you know, following up on their ticket. If, you know, they try to do a good job, but they're so busy that sometimes they don't put in pertinent information that we need to Bill it, you know, where they got the part? Was it truck stock? Was it, you know, did they go to one of our vendors? You know, there's just, it just slows the whole process down in billing?

ALEC

7:01 Got you. Okay. And we can definitely help you guys with those delayed billing issues as well. And with that, what are you guys quote out of and Bill out of? Are you guys quoting out of your accounting system? And then what are you guys a quote Quickbooks? Okay? And how's that quoting through Quickbooks? I kinda hear mixed things. Some people like it. Some people are kinda indifferent. So you don't like it. Like, do you guys like the way it looks for the customer? Like the way you track it or how's that kinda going for you guys?

JOHN

7:31 Okay.

JOHN

7:37 For it, I mean, what we don't quote as we?

JOHN

7:42 Just generate the tickets.

JOHN

7:44 The...

JOHN

7:49 Yeah, we get the tickets through due forms and then we have to manually input them into Quickbooks.

ALEC

7:56 Okay. And then if you guys have like a repair opportunity, I'm assuming then you're just quoting it out of like an e-mail or an Adobe?

JOHN

8:03 Yeah, or what? Okay. Yeah.

ALEC

8:07 And do you guys use any kind of templates or are you doing a lot of like copy and base action or?

JOHN

8:12 Pretty much.

ALEC

8:13 Okay. Gotcha. So we can definitely just to let you know that's definitely a workflow that we're really good at. Probably one of our flagship workflows that. So I'll definitely show you that today, but I also want to focus first on the office view since it seems like you guys just need visibility on your customers. What's do kinda getting organized. Are you doing that like spreadsheets or whiteboard or how's that kind of going now? Like how are you attempting to?

JOHN

8:42 Yeah.

ALEC

8:43 Okay. And then some people I talk to sometimes they wanna like track the equipment they work on.

JOHN

8:51 Like...

ALEC

8:52 History information about that. Okay? It's all stuff you're interested in as well?

JOHN

8:56 Yeah. I mean, not, you know, like we, we're not gonna track the truck stock, like we're not going to have them like doing inventory of their trucks and, but just having a list of what we've used recently to be able to pull up and say how, you know, how much is, how much did we buy our recent filters for our, you know, like you said capacitor or whatever we'd be able to pull it up quickly and see the price, see where we got it from. That would be helpful.

ALEC

9:30 Okay. And we can all talk about it. I was more talking about like your customers equipment, like I don't know.

JOHN

9:36 I'm sorry?

ALEC

9:38 No, you're good. You're good. Is that something you care about? Like track? Okay?

JOHN

9:43 Yes, yes, definitely.

ALEC

9:46 And are you doing that? Not doing that spreadsheet or how's that kinda going? Do you know?

JOHN

9:51 We have job folder?

JOHN

9:53 That we keep information on. I mean, again, Jackie knows every one of our customers inside and out. So she basically has it in her head but, you know, it's there's no formal way of tracking it.

JOHN

10:12 Okay. I have a reference back on old tickets, a lot of time like, hey, we replaced this a few months ago, what, you know, and just kinda go backwards and then back track for it.

ALEC

10:26 Gotcha. And Jackie, do you do the text oftentimes call you? Because one thing I hear from people in your role is that they'll need service history, they call you. And then maybe you have to refer to past invoice. Is that something you guys deal with like the phone radio is like we call it?

JOHN

10:41 Yeah, pretty much.

ALEC

10:44 Okay. Yeah, we'll definitely, I'll show you some ways we can hopefully cut down on that. But obviously, you know, bell is always going to be ringing somewhat cool. And then one thing I was just curious to know after talking to you guys for a little bit here. So the way your business is set up, are you guys doing the install and then securing the service after or a service more of a separate thing or is it kind of like you go and install like, hey, we already installed it. Do you want a PM? Is that kinda technically?

JOHN

11:10 Definitely. We definitely try to capitalize on it on the installs. Yes.

ALEC

11:17 Okay. Sweet. And then, you know, it seems like organization streamlining things is kinda the main thing you're looking for. I'm sure there's some other things you'll see today if you were to be able to streamline your things track, things better be a little bit more organized. I mean, what would that do for you? Is that like time saved? Is there something you're like, what are you kind of? I guess looking to accomplish if you were able to do that if you get what I'm saying?

JOHN

11:43 Definitely time saved definitely for sure. That's a number one, but I think it can also help grow our business because we would be, you know, just more streamline and what, how we do things.

ALEC

11:58 Right. Okay. Gotcha. Cool. So as far as how you guys have evaluated software in the past, you just walk me through really briefly on like if you like what you see today, how you guys typically evaluate things, how that typically goes for you guys?

JOHN

12:15 Yeah, we're just, you know, we're talking to different, obviously different software companies and just collecting information right now. And then we'll make the final decision on who has everything that we need and the cost associated with it. Yeah.

ALEC

12:34 Yeah, totally fair. And then, is there anything else we haven't talked about so far that's going to be really important as far as your criteria for picking a software? Seems like the main things are organization streamlining those repair opportunities to free up time and grow your business. Is there anything we haven't talked about so far that's also really important that we haven't touched on?

JOHN

12:57 Well, just customer service on the software and making sure that we have our needs met and not having to, you know, track somebody down who, you know, doesn't know our business or doesn't know our system, being able to quickly get answers to questions?

ALEC

13:17 Got you. So you're more referring to like if you were to go with, the vendor, the, okay. Yeah. So I mean, I can touch on that a bit, but we have a 95 percent customer retention rate. So we're very selective of who we work with. We try to make sure we work with the right companies. I have a little bit of slides prepared, but just to let you know, we only work with commercial service contractors.

JOHN

13:39 Yeah.

ALEC

13:39 Specifically mep, mechanical contractors, and fire and life safety contractors. So there's a lot of vendors out there. They'll work with everyone under the sun. We're not that as well as a lot of our support is local here in the states. So on all our plans, you have support, you also have an account manager too, and I'll send you some of this stuff. So I don't want to overwhelm you with that, but that's definitely, you know, one thing we take super seriously here and I know everyone's gonna tell you that, right? But if we get to the point, if, you know, you wanna talk to a customer or something along those lines that, you know, our customers will really out for us and terror views as well. And then I understand you guys are kinda looking around seems like you're going to narrow down the search and then kinda go from there. As far as when are you guys looking? I know a lot of H back mechanical contractors that talk to right now. They're looking at implementing this in the winter so that they're not having to do this in the busy season. Have you guys thought about when you would want to implement a solution or when you would want to go live? Is that?

JOHN

14:43 Yeah, we're thinking October first.

ALEC

14:49 Okay. So like start the process.

JOHN

14:53 Yeah.

ALEC

14:54 Okay. Gotcha. Cool. Well, I'll get into it first. There are some things that I definitely want to clarify but I wanna get in the platform first. So, okay. Unless you guys have any other questions, what I can go ahead and do is I can go through. I just have some brief slides just to kinda give you a little more background on us and then we can go through the platform. Does that sound good?

JOHN

15:13 Yep.

ALEC

15:14 Okay. Sweet. So you just give me one sec here?

JOHN

15:22 So...

ALEC

15:24 What I kinda had plan for today. I'm gonna kinda change the order a bit. Typically I go on the mobile view first, but since it seems like you guys really need more office visibility, I'm gonna start off in the office actually.

JOHN

15:36 Okay.

ALEC

15:37 And tell you how we organize things.

JOHN

15:39 Right.

ALEC

15:39 And just the general feel of our platform. And after that, I'll hop in the field, kinda show you what they can do.

JOHN

15:46 Right.

ALEC

15:46 The visibility, they'll have a, throughout the whole thing. I'll sprinkle in some customer facing stuff, some things that you can send out a service trade to.

JOHN

15:55 Okay.

ALEC

15:57 In short, you know, we understand that there's a 40 percent shortage of technicians in the workforce right now, basically because there's a lot of people not going to school for the trades and then the people in the workforce are retiring. So there's an eight percent loss of technicians in the workforce. So what that basically means is that the gap between the demand for your work like the amount of work out there and the technicians you have on staff that's growing every single year. So it's becoming more and more important to streamline things and make your technicians as productive as possible. Now service trade. What we can do is we can help you control costs. So a lot of things we just went over, you know, improving your service operations, setting up your technicians for success, giving them tools they need. We can definitely do that. But what service tray can also do, and what some of our customers realize after they sign is we can help you grow your quality revenue keyword being quality. That's gonna mean selling more service agreements, putting you in a position where you can execute on those agreements more whether it's not missing the, or reporting more repair opportunities to ensure your equipments working or their equipments working as well as grow customer loyalty. And really what we wanna do is put you in a position where you can fire. The bottom five to 10 percent of your customers are the ones that aren't paying the invoices or hard to work with or third party work stuff like that. Now, as far as the different places in the business we affect, there's a good variety. I'm not gonna dive too deep into notes right now but just kinda give you a high level overview for like the office, one of the main ways we help out the office is giving the office more visibility on what jobs are due, giving the office more visibility on PM management. There's a lot of other things here but that's just kind of what I'll touch on for now for the text in the field, we

wanna make it convenient for them to report more repairs, get more pipeline back to the office. And we try to make it as easy as possible for them to give you high quality information that could be tax, that could be voice memos, photos, videos, I'll go through some of that today, but you should, you know, really the goal of that is for them to see service history and get on more jobs. There's one more job a week, a month, a day, whatever it might be... for the customer, we wanna make sure, you know, it's kinda the Amazon age now. So we wanna make you guys an easy business to do business with. And that could be, you know, quotes, you know, making your quotes easy to approve, quick to send out, being able to get those on the same day. That could be like a post job report like after you complete the job, sending the customer report, letting them know the story of what you did. That way they're not going back and forth with you on the price. They actually see the full picture. I'm not gonna touch on these last two too much, but management visibility, just know that ServiceTrade there's a lot of native reports you can run there's. Tons of data you can kinda use in here to be efficient. And then with the sales like for you guys, mainly, it's going to be a lot of it. It's gonna be the quoting that's how a lot of our customers at least starting out, see a lot of sales, successful service traders are quoting and I'll send you a quote today. You have an idea what that?

JOHN

19:14 Looks like? Okay?

ALEC

19:17 But last slide here, so we actually got our start at a company called Don well, which is a commercial service contractor since we went to market and we've been in business for over 10 years. Now. We've had multiple rounds of funding. And the cool thing about that is that since we use all our product development budget, we use it all on workflows that will help you guys because there's a lot of like ERP or accounting systems or all in one softwares out there where their product development is scattered. But we're here to help you guys, you know, scale your service department, grow your service department. I'll show you some things today, but we really only specifically work with commercial service contractors specifically mechanical and firing life. But unless you, do you guys have any more questions or any comments based on anything just up there?

JOHN

20:07 No, no.

ALEC

20:08 Okay. Sweet. So I'm gonna go out and get into it. Feel free to interrupt me at any point. If anything doesn't quite make sense, you need any clarification?

JOHN

20:18 Okay. Could we, cause I know, you're gonna be great at the service side. I'm sure of it. Could we do start out with the job costing on let's on our bigger jobs, like what you can do for us there?

ALEC

20:38 Yeah, I could show you a project real quick if that's what you're saying, just give me one sec. Okay? Now, as far as the software you're looking at, are you ideally trying to get something for the install guys and the service side?

JOHN

20:53 Yeah.

ALEC

20:54 Okay. And out of all those installed jobs, how many of them are you working with a GC or doing a billing? Is that all of them, half of them or?

JOHN

21:05 All of them?

ALEC

21:06 Okay. No worries. Just to let you know, yeah, we don't do that, but I can't show you what a project is. Just give me a.

JOHN

21:15 Great.

ALEC

21:17 I can show you that real quick. I will have to do a little bit of fishing because I need to find one that I did not have that prepared. Just give me one sec. Let's see if this one will work.

ALEC

21:39 Is not the best example. Give me one sec. Now, I guess while I'm trying to find one that we can use, this is just the demo account. So there's just a lot of different jobs in here. But, are you guys open to having a software that's just for service? And then one just for projects? Because I know, no, not open to that.

JOHN

22:07 I mean... we're just double paying for, you know, I would rather get one one company that can do everything that we need it.

ALEC

22:22 Okay. Well, just to let you know that's totally fine if you wanna do that. But sometimes what we've heard from our customers is that if you get the software that can claim they can do everything, sometimes the service side is a little bit of an afterthought or the, you know, project side... is definitely something to consider. But I mean if that, if that's like just is what it is like we can't do AI billing and we work well with GC. So I want, but I can, I think this one should work. This is... what do you say?

JOHN

23:00 I said that's you know, I just let's see what you can do and we'll figure out for a job like putting in a budget and tracking... the costs.

ALEC

23:20 Okay. Yep, sounds good. So essentially, this is what a project looks like in service trades. These are the functionality we've released this year. There's really a couple of main things. So one, it can obviously be multiple days, multiple phases. So you can see here that we have, you know, four phases of work. This is an RT job. We can see that this job has been completed... as far as the performance on the job. We can always view our performance in our budget. So if I click view budget.

ALEC

24:03 You can see, you know, what things are costing the active budget, how we're performing to the budget. We can always add job items to if we need to add either labor... you know, parts items, stuff like that. You can also create change orders as well to ensure that you're profitable. So if you create a change order, you can send that quote to the customer, making sure that you're still on track for that. And then we have a summary up here as well. So you can kinda give you a high level overview of what's kinda where the budget is going.

JOHN

24:40 Okay. How do you create that budget? Like what, how does that... work? Can you walk me through like creating a budget?

ALEC

24:53 Yeah, yeah, absolutely. So if you go to manage a job, so this is the job I actually had lined up today is just a PM job. If we go to manage a job, all you'll simply do is you can manage a job as a project. So you just click that tile.

JOHN

25:10 On. Okay.

ALEC

25:12 And then that enables you to use all these, you know, budget performance, all this functionality here. Now, since I've toggle that on, I can set a range or whatnot, if I want to. So you notice here, I have a range, I can even name the project if I want to do that. And then you'll notice too. Are you guys something out for a lot of your projects? Yeah. Yes. So, we don't have that either. At least right now, it's not to say we won't have in the future but definitely not any time soon. So we can't sell out just so you know that as well. So then if I save that here, from here, I can create a budget and then that performance tab is automatically open and I can create a budget from there.

JOHN

26:03 Okay.

JOHN

26:07 All right. Why don't why don't, we go back to the service side? Show us the service side.

ALEC

26:15 Okay. Yeah, yeah, absolutely. Because it sounds like to me, I don't really know how much value we can bring to your project. So it seems like, you know, it's just not really a fit, which is fine, because.

JOHN

26:29 I mean, I guess we could consider doing two separate software packages.

JOHN

26:34 I definitely don't want to. Okay.

JOHN

26:40 Well.

ALEC

26:40 I mean, it just kinda depends too, right? I mean, it seems like from what you told me the install side has more priority on the service side, is that correct?

JOHN

26:50 Well, no, we, we've got into this looking for service, but our main, you know, revenue generator is, the job side, the, you know, Installation side. So, you know, we definitely need something that's gonna do both because we, you know, we have to keep track of our big jobs as well.

ALEC

27:15 Right. Okay. Gotcha. Well, obviously, depending on what you look at, you know, you might find something. I'd say it's rare to find something that's really strong in service and then really strong in Construction.

JOHN

27:27 Yup.

ALEC

27:28 It's more common is typically, it's really good at Construction and services kinda what I mean?

JOHN

27:33 Yes.

ALEC

27:34 So, depending on how your search goes, I mean, we work with pro core. It might not be. I don't know if you took a look at them, but anyways, I'll go and get into it. Enough of me talking, but.

JOHN

27:44 Actually, right?

ALEC

27:46 Where I wanna start is the service dashboard. So the service dashboard, this is the homepage. This is what you'll see, right? When you log in a service trade. So first, you have a simplified daily schedule. So what's going on in the business today? Next, you have overdue jobs that appointments, these can be PMS or even service calls that are overdue instead of those jobs in the cracks. You can see that right here.

JOHN

28:13 Right.

ALEC

28:16 Next, we have jobs that appointments do in the next two weeks. So these are peas that are doing the next two weeks, you know, the nowhere I'll just be right here on the dashboard.

JOHN

28:25 Right.

ALEC

28:27 We have past jobs to be more complete. So, when your technician fills out the work order and completes, it goes to this bucket here. This is for someone in the office like Jackie or yourself to look over before passing on Bill.

JOHN

28:40 Okay. Yeah.

ALEC

28:42 And then we have completed jobs. Be invoice, just one fine reminder that, hey, we need to go ahead and invoice out this work.

JOHN

28:48 Okay.

ALEC

28:50 Now, you can run reports on a lot of these things. But the idea with the dashboard is it just gives you a high level overview without having to take for stuff... now, as far as how we organize locations since we are built specifically for commercial, we basically organize our locations from a Bill, to ship to relationship basically, meaning that oftentimes you're billing one billing location and you're servicing multiple locations. So, for example, here, I have my target headquarters, so I can put all my billing contacts here. Any information about billing?

JOHN

29:30 Right.

ALEC

29:32 But then under that, I have my five physical locations I service. So each physical location that we service will have its own information on...

JOHN

29:42 Page. Yeah.

ALEC

29:47 If I click on that... essentially, this is gonna pull up all the information I need. This location, I'm gonna mainly pull up the main ones. But if there's anything that catches your eye, just let me know and I can explain it.

JOHN

30:03 Right.

ALEC

30:05 So the first thing we have here, no, one of the things you told me was that you want a better way of managing those recurring services. This is how we manage those recurring services service tree. The general concept is a set and forget. So for example, we can have our asset to service. So what asset are we here to service? So I'm here to work on east rooftop unit three. I then have a brief description. So what am I typically doing when I go out to do this work... scheduling frequency? Is this a quarterly, semi annual, biannual stuff like that? And then I have the parts labor items list. So what parts labor items am I using? And you can also set up templates for these. So that way you're not having to manually type them in every time. So if you have a pretty common, you know, that you guys do, you can put some templates in you're not having a.

JOHN

31:05 Yep. Right.

ALEC

31:07 But really the idea is that we set that up once and we forget it. So between the service trade dashboard and other reports, we can run none of those PMS.

JOHN

31:17 Through the cracks, right? How do you, how do you like? So we would just be putting in the assets at the beginning. We would, you know, manually get this all in there and then it would be in there.

ALEC

31:31 So it just depends if you're tracking it now and you have a way of getting it in a spreadsheet, you can bulk import it. So you're not having to manually enter at all. But if you don't have it in some kind of spreadsheet or database, that would be like putting in it manually, but some of our customers that already track this stuff, if they have a way to get it in a data file that we can bulk import? As long as you submit that to our team, we can get that.

JOHN

31:56 Okay. And do you have like optical recognition where we could take a picture of it of like the data plate on... a, on an asset that would have the model serial number that could just import it?

ALEC

32:14 Yeah. Are you talking from like just data perspective or for more of like just having the like once, like are you talking from upfront? Like getting the data in the system?

JOHN

32:25 Yeah, yeah. Like, if our guy, you know, we're starting up with service trade and we're getting all this information, could our service tech take a picture of the data plate of the unit? And somehow that would be uploaded to the customer database?

ALEC

32:47 So, in short, no, but in long, we do have some technology like that with our other products. For example, we acquired a company called Northboundary which is like a mechanical sales tool. What some of our Northboundary customers are doing, that also use service trade, is there is technology in there when you're going to survey the site, try to get accurate job costing. So when you send the contract, it's profitable, they can scan the equipment, get that equipment, stuff in there. And then once you sign them up, we're still working on it, but eventually you're going to be able to push that equipment to service trade. But that's more from a sales perspective, not you're already a customer perspective.

JOHN

33:28 Right. Okay. All right.

ALEC

33:35 And then as far as like a report, you could run. So, for example, if we wanted to see... like, hey, what are the PMS I do next month, if I go to this service opportunities report, there's a lot of different filters I could put in but I'll just make it simple. I

wanna see the PMS I do next month. It's gonna populate all those PMS based on the presets I set on these pages.

JOHN

34:01 Right.

ALEC

34:04 And then from here, you have a couple of options. So you can either go in these one on one. So I can see here, for example, my cost go in New Jersey. I have two PM do so instead of going out two separate times and wasting gas, I can go all out in one day that's an option... or two. You can actually create these work orders in bulk and schedule them out from there. So if you just wanna create all the work orders for the PMS, you have to do instead of doing that manually or putting in a form or paper or whatever, you can just create it in bulk and dispatch from there.

JOHN

34:39 Right. Okay.

ALEC

34:42 Could you, is that kind of what you're looking for as far as PM management, managing those PM and stuff like that?

JOHN

34:47 Yes.

JOHN

34:48 Yeah, definitely. Yep.

ALEC

34:52 Okay. Sweet. And then as far as the assets, so just to kinda briefly go over those, you can track multiple pieces of equipment at a location and we have all kinds of equipment types you can put in here. But you can see I have quite a few because I talked to a good variety of folks.

JOHN

35:15 Yeah.

ALEC

35:15 But just to show you an example of one we'll work on today, we do have see here the east rooftop units. So this is a good example. So you can put in as much or as little information as you'd like... this is helpful for if the customers call in, you have a database to refer to. Hey, what did we do? Last time? What repairs have we done? But it's also helpful for the technicians because they can see all this in the field.

JOHN

35:42 Yeah. Well.

ALEC

35:44 But you can put as much or as little information in here. So warranty date, filter size, filter, quantity, install, date, stuff like that. And then we also have our services. You can see any services tied to this equipment, whether they're recurring or just break fixed calls. We have all the work orders ever been done on this piece of equipment. Any deficiencies or repair opportunities. We can see, we've had quite a few compressor repairs, maybe we, you know, replace the equipment or what?

JOHN

36:22 Yeah. Okay.

ALEC

36:26 You know, quotes, what quotes do we have about what's the status of those quotes?

JOHN

36:30 Right.

ALEC

36:31 And then if you wanted to put a manual or something like that for them to refer to, they can have that.

JOHN

36:36 Right. Okay.

ALEC

36:41 Yeah. Any, any thoughts on that? I think I heard Jackie say something or I don't know if I was.

JOHN

36:44 Just said it's...

JOHN

36:45 That's really nice.

ALEC

36:49 Okay. Nice. Is there anything that stands out? Is that just like the time saving piece your earlier, you can see?

JOHN

36:55 Yeah. I mean, I guess that my only question would be, I would like to see that on the mobile app because I'm almost thinking that that's so much information. It's awesome. But like, you know.

                              JOHN

37:07 I'm thinking, Mike is.

                              JOHN

37:10 He was no?

                              ALEC

37:12 Good.

                              JOHN

37:13 Yeah. You know, it might be almost too much information like, and plus, he already knows it, but, you know, how does that look? I'd like to look at the mobile app and see how that looks to the tech.

                              ALEC

37:25 Yeah. And I'll definitely show you that in short before I show you the main emphasis on the mobile is just getting the history as quickly as possible.

                              JOHN

37:32 Right.

                              ALEC

37:32 The way it's kinda set up, it's not, I don't think it'll overwhelm him, but I'll let you be the judge of that. But yeah, I'll show you that too.

                              JOHN

37:39 Okay. Great.

                              ALEC

37:42 And then just a couple more things before we step over to that. There's you know, this is your record of truth for everything that's customers. So just go through these really quick work orders. Any work orders, deficiencies, any repair opportunities at the location, you can either get as specific as the asset or if you want to see the whole location, you can see.

                              JOHN

38:05 Okay.

                              ALEC

Any quotes we've sent out for the location? The... some customers really like these site specific comments. So these can be either internal the office or for the tax, but designed to limit phone calls back to Jackie.

> JOHN

38:20 Don't send them that's where is?

> ALEC

38:24 Yeah. Do you guys have a?

> JOHN

38:25 Billy we got it.

> JOHN

38:28 Yeah.

> ALEC

38:29 Yeah, that's our CEO, but, yeah, I've heard that I'll send certain people certain... and then we also have these attachments. So if you want to put a forward plan or something like that in there too.

> ALEC

38:49 But is that kind of what you were looking for? I know you like organizing. Yeah.

> JOHN

38:52 For sure. Yeah.

> ALEC

38:54 Sweet. Cool. So what I'll do unless you guys have any more questions, really brief, this is a work order and service trade. So what you'll notice is that all that information from that?

> JOHN

39:05 Yeah.

> ALEC

39:06 The list, the equipment, it all came over, I needed to make any slide adjustments I could have. But unless you guys have any other questions that I can do is I can hop in the mobile app and show you what it looks like for.

> JOHN

39:18 Yeah. And then we can go back. I would like to see the invoicing of that as well.

ALEC

39:23 That's what we'll do. So what we're gonna do is gonna go through the app, go through the whole job. I'll show you a quote and then an invoice as well.

JOHN

39:30 Okay, perfect.

ALEC

39:32 Sweet. So just give me one sec guys. Well, I'm pulling this up, just a couple of quick things. This can be used on iPhone. Android can also be used on a smartphone or a tablet. Okay? Basically what you're looking at here is these are the work orders that I have going on today.

JOHN

39:51 Okay.

ALEC

39:52 There's a variety of ways that we can filter these work orders, but I just did it by today to keep it simple.

JOHN

39:56 Yep. So.

ALEC

39:59 I click on this work order here. This is basically what a work order looks like. It search straight. Now, if you look here at the bottom, there's three ways you can track time. It's completely up to you. If you wanna use all three of these. Just one. But we have job prep, we have in route. If we wanted to send our customer in route notification, we could... and we have on site. And if I clock in on site, that will take a GPS snapshot. So it's gonna tell you, hey, Alec is 322 Miles away from this location. Might be a tough phone call.

JOHN

40:37 Right.

ALEC

40:37 Okay. As far as this app, most of the time, they're typically going to interact with these eight major tiles of information. I'm gonna cruise through the main ones. But if you guys have any questions on any others or anything standing out, you know, feel free to let me know.

JOHN

40:56 No, yeah. Go go through it. Let's see.

ALEC

40:59 Okay. So the first one we have as our services, so this is what am I here to do today? What am I here to work on? So I can see the brief list of things I'm here to do and the unit I'm here to work.

JOHN

41:12 Got it. Okay.

ALEC

41:15 Next, we can see the comments that we want our technicians to see. We can also list the job. If the technician add a comment, we can do that.

JOHN

41:23 Okay. Yeah. So.

ALEC

41:24 Then that way he's not calling Jackie for this stuff.

JOHN

41:28 Yeah.

ALEC

41:31 We also have various ways that they can put medias. This is really good for the quote. So the invoices, you know, usually if you had two to five things a media on a quote invoice, et cetera, less problems. But if they need to take any before and after pictures, they can, should be more exciting than this picture I just took here. Yeah, they can also record audio memos. A lot of our technicians hate writing or typing. So if they record audio memo or take a video, they can do that.

JOHN

42:02 Okay.

ALEC

42:09 Job items as well. So if you want them to, they can go in and add job items, make adjustments to job items, stuff like that. So they can do that in here.

JOHN

42:20 Okay.

ALEC

42:22 And then the last thing I'll show you before we take a pause step back is the assets. This is how the assets looks like in the, so notice that he can see the asset that he's working on today, right? Is that rooftop unit, I'm working on today?

JOHN

42:37 Right. If.

ALEC

42:38 He wants to, he can see all the assets you guys work on. So, if the customer has a question about something else, right? Perfect.

JOHN

42:47 Yep.

ALEC

42:50 But as far as how this looks... so, if I go here... so this is an example of how it looks. So basically, the main thing that they're gonna want to probably access is that service history so, that here?

JOHN

43:08 Yeah, yeah.

ALEC

43:11 But they can also see any deficiencies that have ever been logged on this asset. So, you know, what kind of repairs... and then if they want to look at all this information, they can, but keep in mind, you're in control of how much you don't have to put all this in, but sorry, did Jack, do you have a question?

JOHN

43:31 Yeah, the ad tags up at the top, what, can you add the plate on there? The data plate?

ALEC

43:43 Yes. So, this tag that's more referring to, we have this tagging system in our system. If you add a tag, when you search things, there's a lot of places you can put tags, it's just adding the searchability, they can add like.

JOHN

44:02 Files and photos, right? Yeah.

ALEC

44:05 So, if they wanted to take a picture of the plate you guys in the office would just have to take that and put it in. So like I...

JOHN

44:14 Yeah. Okay.

ALEC

44:19 But any questions or impressions on this app so far? I know I hit you with a lot. So I just wanna make sure we're taking a step back or comprehending all this, what are your impressions on this so far?

JOHN

44:29 No, it looks good. It's good because it doesn't overwhelm them. They can click on what they need as they go through the job. But so, how does a work order go to an invoice? How do, how do they?

JOHN

44:48 Completed...

ALEC

44:50 Yeah. So what I'll do is I'm gonna report a repair real quick just so you can see how that works.

JOHN

44:55 Okay. And...

ALEC

44:56 Then once I clock out of the job, basically how it works, is when I clock out of the job, it's gonna give me a couple of options?

JOHN

45:02 Right.

ALEC

45:03 And I'll show you how that works.

JOHN

45:05 Is it's...

ALEC

45:05 Gonna ping the office and then remember that past jobs to be marked complete?

JOHN

45:09 Right.

ALEC

45:10 When I complete the job, it goes into that buck. So basically, it's okay. The tech looked it over someone else looked it over now, right?

JOHN

45:18 Right. Okay.

ALEC

45:20 But in short, let's say your check finds a repair opportunity. This is one of the main ways that we're different from a lot of softwares because this is definitely one of our flagship workflows. So, let's say they find like a broken compressor or something like that. They like new deficiency. They can go ahead and type in here broken compressor or whatever brief verbiage they wanna type.

JOHN

45:42 Right.

ALEC

45:45 Similar to what I was showing you in the attachments, if they wanna take any pictures pertaining to this repair, because one thing I tell the customer...

JOHN

45:53 Right here.

ALEC

45:53 You're having this issue, it's another thing to show.

JOHN

45:56 Yeah, so.

ALEC

45:57 You can do that.

JOHN

45:58 Right.

ALEC

45:59 Do you guys take a lot of pictures by chance or?

JOHN

46:02 Not a lot, but enough, I mean, for sure. They do take pictures yep.

ALEC

46:10 Cool. Yeah. So, you'll have a way to, you know, add those to the quote from here. We can also select the severity. So I'm gonna say that this deficiency is inoperable. It's not functioning there's. Some other options here too. Then we also have the assets. So this is how we build that service history so I can tie it to that east rooftop unit three.

JOHN

46:33 Okay. And...

ALEC

46:34 Then the only other thing I can put in here that's mandatory, is it a new deficiency? So, I'm saying this is a new repair opportunity, something we need to get.

JOHN

46:43 Quoted out. Okay?

ALEC

46:46 And if I save that here, what that's gonna do is who's ever in the office, whether it's you or Jackie, that needs to quote this out. You guys will receive an e-mail notification.

JOHN

46:55 Okay.

ALEC

46:56 That e-mail is basically to say, hey, service trade founded efficiency here's. The exact link you need to quote it instead of it, just you having to go hunt for it, have the exact link you need. So you can quarter.

JOHN

47:08 Okay.

ALEC

47:11 Do you think that would help your technicians report more repairs by chance?

JOHN

47:16 Yes, no doubt. It would, it would just be able to create more work too, because sometimes those things just slide through. They'll tell us but we, you know, it's just hard. So, yeah, yup.

ALEC

47:32 Cool. Yeah. And that's you know, this cool thing too is like even, you know, even if you had a system like this, you're still gonna want ways to report on it. So, even if you miss it coming through our system as well, you'll have ways to report on that. So

you're not missing this stuff and give that a sec. But as far as how a work order gets completed and how it gets invoiced. So from the technician. And if they want to complete this work order, what I'll do is I'll click clock out.

                                JOHN

47:57 Yep. Well.

                                ALEC

47:58 All the option, do I wanna mark the service as complete? Or do I not? I'm gonna say I do wanna market.

                                JOHN

48:03 Okay.

                                ALEC

48:05 And then I'm gonna say that this appointment is completed.

                                JOHN

48:07 This one, okay?

                                ALEC

48:11 And then I'll go back to the office to kinda show you how it travels on the.

                                JOHN

48:15 Perfect. Okay. Now, what if they, how do they put in the equipment that they used on that?

                                ALEC

48:23 Yeah. So when you say equipment, are you referring to like parts labor items?

                                JOHN

48:27 Yes.

                                ALEC

48:29 So, a lot of our customers for the PM jobs, they kinda have an idea of what they're gonna use. They already have some already in there. But if they need to add any, they can add items from this job item screen and they can either add an item from scratch or ones you already have.

                                JOHN

48:44 Okay.

                                JOHN

48:45 Can they oftentimes, they'll just run out to one of our vendors.

ALEC

48:51 To...

JOHN

48:51 Get something, can they add like a receipt or a picture of the receipt?

ALEC

48:59 So, what most of our customers are doing is, if they do get that they like take a picture or something like that?

JOHN

49:06 Yep.

ALEC

49:07 As well as if they wanna put any information. So, for example, let's say I got a part from home depot?

JOHN

49:16 Right.

ALEC

49:18 Now, service trade core, we're not gonna cut the po, but if they have the po, they could put in home depot. If they have the po, they could enter that in here.

JOHN

49:28 Yeah.

ALEC

49:30 So... and, you know, that's obviously a random number, and then we can, you know, did we already get it? Like, did it, was it delivered? Did we order it? Did we not order it? We have some options there?

JOHN

49:43 Is, is there an option for picked up? Like I picked it up?

ALEC

49:48 Yeah. So I think that would be?

JOHN

49:50 Delivered? I guess. Yeah.

JOHN

49:51 Okay.

ALEC

49:53 Yeah. So they can add items from scratch. And then if they, you know, still need to add a picture or something like that, they could go to these attachments here. When you add a picture to, you can put a little title under it. So, if they want to put receipts so you guys can, yeah, they can do.

JOHN

50:09 Okay. The cluster is not gonna see the receipts.

JOHN

50:13 But the, yeah, like the customer wouldn't see that correct?

ALEC

50:18 Only if you wanted them to. So service trains very permission based if you want them to see things, you can have them see things then if you don't want them to see things, most of our customers obviously aren't sending over too many audio memos or?

JOHN

50:32 Yeah.

ALEC

50:32 You don't want to.

JOHN

50:34 Pictures of that. We definitely wouldn't yeah. Okay.

ALEC

50:40 Yeah. You have the option too. If the technician wants to do it, they can mark it as internal or they can market, but you always have the option in the office before you send out anything and I'll show you that in a site too.

JOHN

50:51 Okay.

ALEC

50:53 Cool. But, as far as this information, so if you just give me a sec... so if I refresh this job, basically, everything comes back.

JOHN

51:06 In real time, okay?

ALEC

51:09 So, you can see now here that the service was complete and that was complete?

JOHN

51:15 Yeah.

ALEC

51:16 I'll show you invoicing in a sec, but you can see what parts labor items they used.

ALEC

51:25 Any attachments, if you guys got any work acknowledgements or job receipts, I have a couple of here.

JOHN

51:31 Okay.

ALEC

51:33 But really the main entre of this page, so to speak, is this deficiency?

JOHN

51:39 Yeah.

ALEC

51:40 You can see that deficiency already came here in real time as far as how that comes in via e-mail it's gonna look something like this. So, basically, when the deficiency comes back, you'll receive an e-mail it's basically to tell you in real time. Hey, who reported it? Where is it? From? What unit description? And then if you click this little link here, it's basically taking you to this deficiency details.

JOHN

52:12 Okay. Yeah.

ALEC

52:14 That's...

JOHN

52:15 Efficiency, I'm sorry, so that is created so that you can then forward it to your customer or does it go directly to your customer?

ALEC

52:24 So, the way it works is the technicians reporting it, and we wanna make sure the technician is getting to as many jobs in a day as possible because of the labor shortage.

JOHN

52:31 Yeah.

ALEC

52:32 So, they're gonna report it. You guys will get this back in the office and then criteria, you'll create the quote. You'll send it to the customer. You wanna make sure you're sending the right?

JOHN

52:44 Yeah, yeah. Yeah. Okay.

ALEC

52:47 So, in real time, I got this broken compressor opportunity, I might look this over if I want to flip it to a quote.

JOHN

52:53 Right.

ALEC

52:54 Add quote.

JOHN

52:56 Yeah.

ALEC

52:57 And create quote?

ALEC

53:03 And then, you know, if you wanna write up a quote from scratch, you can absolutely do that. So you can always manually put in a description or manually put any parts labor items. But what a lot of our customers like to do for their relatively common repairs. At least you can create these quote templates. So, instead of doing some word copy and paste action... you can put it in a template, they'll have a brief description of.

JOHN

53:30 Right.

ALEC

53:31 What you guys want the customer to see your parts labor items. The idea is that will get you about 80, 90 percent of the way there.

JOHN

53:41 Right.

ALEC

53:42 All we might need to do is go in and make adjustments. So my marking looks pretty good here, but maybe this customer prefers, you know, line items or whatever different options formatted?

JOHN

53:54 Yeah, if.

ALEC

53:55 The cost of these things ever change because parts are changing all the time.

JOHN

53:58 Yeah. Okay. Well.

ALEC

54:03 But are you typically sending out those quotes, Kate? Or is that Jack or you guys kinda tag team in?

JOHN

54:08 It's Jackie.

ALEC

54:11 Okay. Well, I don't know. Is Jackie still here?

JOHN

54:14 She's here? She can see it.

ALEC

54:16 Cool. Yeah, I was just curious, Jackie on how this kinda compares to what your process looks like right now from your end, hi.

JOHN

54:23 I think it's much easier actually as long as the correct information comes over. My, my biggest struggle, is calling them constantly like, okay, how many hours, is how this is?

JOHN

54:40 You...

JOHN

54:40 Know, the labor hours to repair and all that stuff.

ALEC

54:47 Right, right.

JOHN

54:50 Yeah.

ALEC

54:51 You guys, sorry, let me interrupt.

JOHN

54:53 No. So, all that information is in this, where I could just, you know, transfer this to a quote that be that'd be great... as long as information.

ALEC

55:07 Right. Because the idea is between the templates and then maybe some of the audio memos or videos and pictures, they'd be a little less of that. But I mean, being realistic, you're probably still going to do that a little bit regardless of what platform you go with. But the idea is we definitely want to chop that in half or something. Yeah.

JOHN

55:25 Yep.

ALEC

55:27 But what I'll do is I'll send this over to you so you guys can see what this will look like. So, Kate, I'll send this over to you so you can interact with it, notice too that you see how there's all these toggles like, so... this is with anything, you know, invoices quotes?

JOHN

55:46 Right.

ALEC

55:47 Now, all this stuff. So you're always in control over.

JOHN

55:49 Right, right. What they get. Yup.

ALEC

55:53 But this quote, it should be from a little company called a service. It's our fake company if you click review and respond a quote in that e-mail there should be a little screen there's a big money approved button at the top, right? Take your time and looking at it, but let me know your thoughts, good, bad are different. But, when you approve it, just let me know.

JOHN

56:14 Okay. I'm sorry. So, I got an e-mail on my. Okay. I gotta make the smaller.

ALEC

56:22 Yeah, it should be from a service in the e-mail there's this big button that says review and responded quote. And if you click that, that's will take you.

JOHN

56:30 All right. Hold on.

ALEC

56:31 You're gonna take your time.

JOHN

56:43 Shoot... we have a 1,000,000.

JOHN

56:48 That's what I was trying to hit and it was.

JOHN

56:53 Do, you have your e-mail open? Thought you just.

JOHN

56:57 I know I just saw it but...

JOHN

56:59 Now, I don't know what it.

JOHN

57:02 See up here is where I guess I can do this?

ALEC

57:09 Yeah, yeah, Zoom sometimes?

JOHN

57:12 Okay. I just got it. Hold on.

JOHN

57:16 E-mail. Unfortunately, our system is pretty slow. Okay?

JOHN

57:23 Here we go.

JOHN

57:28 I care. Okay?

JOHN

57:46 So you could get more detail on this, like it's just giving you the description of the work and grand total.

JOHN

57:55 Our customers usually like to see how many hours or no, you would do.

JOHN

58:02 All right. And then.

ALEC

58:04 You can grant, yeah, you have.

JOHN

58:08 Okay.

JOHN

58:09 All right. Yep. That... and then, okay.

JOHN

58:18 Just...

JOHN

58:18 Immediately, she confirm it.

JOHN

58:32 So that, so that would create a work ticket then if it was approved.

ALEC

58:37 Yes. So, basically, did you approve it by?

JOHN

58:40 Yeah, yeah.

ALEC

58:42 Yep. So basically, the way it works is now on our end, we can see it's approved, and we can create a work order from that quote.

JOHN

58:50 Got it. Okay?

ALEC

58:53 And then too, you can, since, you know, we're able to track that stuff. I can see when you've viewed it approved it stuff.

JOHN

59:01 Yeah. Okay.

ALEC

59:06 Yeah. Could you see, how, do you think your customers would like interacting with something like that or just curious?

JOHN

59:12 Yeah, probably.

JOHN

59:13 Yep.

ALEC

59:15 Nice. Okay. Cool. And then as well as to, you know, if you wanted to like if you need to see like real quick, like what quotes you have out?

JOHN

59:27 Yeah.

ALEC

59:27 So, this is like a quote report. This is designed for you to keep track of all this stuff. I'm not going to overwhelm you with all these filters, but let's just say, for example, I wanna see all the quotes in June that have been submitted and viewed. Basically the customer viewed it. They just didn't do any.

JOHN

59:44 Right. Yep. Yeah.

ALEC

59:46 We can prioritize based on the rank here. So this 900 dollars quote might have more priority over this cheaper one. But we can also, you know, you can either call these people up or, you know, it's just as simple as sending it back out to the customer actually.

JOHN

1:00:05 Yeah.

ALEC

1:00:05 Back out so that, you know, they.

JOHN

1:00:08 Yeah... okay.

ALEC

1:00:14 Do you think this would help you guys get more quotes approved? Or I mean, do you see that maybe helping you get one or two more quotes approved a month or something like that? Or?

JOHN

1:00:21 Yup.

JOHN

1:00:23 Okay.

ALEC

1:00:26 Cool. So... do we want to just go over invoicing how that works now?

JOHN

1:00:31 Yes, please.

ALEC

1:00:32 Sweet. Okay. So now we're going back. So once this work order is complete, I can look over the job, items, look over all this stuff once I've ensured it's complete, I'll just click complete job. Yep. And I'll click complete job and create invoice. This is where we can double check to make sure our costs are correct. So, if anything hasn't been updated for whatever reason, you know, we can always go in there and update it. And then once we're ready to go, I'll go ahead and click create invoice. Now, similar to the quote I just sent. Yeah, you know, you're in, you know, I, I'll show you one now that's like a different format. So, if you want to do line items prices now, I'm sure every customers could have their own specific preferences, stuff like that.

JOHN

1:01:25 Right.

ALEC

1:01:26 So, now it's good to go. It's ready to be invoiced. And we can actually send an invoice out of service trade. So essentially, how that looks is our invoices were designed for the commercial space basically, meaning that we understand the person you're billing isn't always the person you work with on site.

JOHN

1:01:44 Yeah.

ALEC

1:01:44 So, basically that's kind of how this is designed. This would be your logo, you know, all that basic stuff you can see here. This is a different format. I broke it down this time instead of grand total. So that's kinda how that looks. Yeah. Cool thing is that they can pay right then and there. So if they've been a long time customer, they don't have any questions. We'll make it convenient for them to pay, they can pay ach, credit card, whatever.

JOHN

1:02:10 Stage payment.

ALEC

1:02:14 But if they, you know, for whatever reason, have some hesitations, they might need a little bit more visibility before paying. So, what we do is we attach this service link. This is a link you can send at any point in the workflows, you can send it after the job before the job, but a lot of people send it as a post job report. Similar. The quote is permission based. So what you want them to see, they'll see, but they can see what technician did the work. When they did the work... the services you guys went to perform... you know, some of these things, maybe you don't want them to see them like comments or stuff like that, but attachments, you know, if they need to see some pictures, they can see those pictures, stuff like that.

JOHN

1:02:59 Okay. Yeah.

ALEC

1:03:01 And then the deficiencies, you can kinda give them a heads up as well. Like, hey, we found these deficiencies might send you.

JOHN

1:03:08 Right. Okay.

ALEC

1:03:11 Then usually, once they kinda have that level of visibility that makes it appealing for them to pay. And then since they can pay here, usually improves outstanding. So, you know, we can accelerate the billing cycle between streamline the process and then give them.

--- Pricing ---

JOHN

1:03:29 Okay.

ALEC

1:03:32 Any, any questions on that? Or?

JOHN

1:03:36 Is there, is it an extra price for them to be able to pay now for like on the service trade side?

ALEC

1:03:44 No. So, we partner with a company called stacks. So you don't have to pay for stacks. Now, what there is, if there is a charge, I believe it's like if it's a card, it's like anywhere from two point seven five percent to three point two five.

JOHN

1:03:57 Yeah.

ALEC

1:03:58 And then if it's a CH, I believe it's a lot less. I can send you a brief article on that, but there's no like extra charge. It just comes with any plan of ServiceTrade but they can pay right then and there is gonna take out the little amount and there's you gotta be careful because of the legality. But there's ways around that like if you want to mark up things a little bit more to cover your, you know, credit card charge or whatnot but in some states, it's a legal to be like credit card charge line item. So, you know, don't really recommend doing that, but there's no charge for stacks essentially?

JOHN

1:04:30 Okay. So.

ALEC

1:04:34 Cool. Well, I know we're at the top of the hour here. I know we went through quite a lot today, but just curious, do you guys think service traits a good fit for what you're looking for or what's kind of your initial impressions so far?

JOHN

1:04:49 You know, it's great on the service side. It's just a matter of how it would line up with it. We would probably have to do two separate, you know, software packages. And so, why don't you give me a quick rundown of your costs so that we can kinda then look into how that would all work?

--- Pricing ends ---

ALEC

1:05:14 Yeah, absolutely. I can do that for a second while I'm pulling that up. Is there a favorite part of the demo you had today or part of the demo you liked?

JOHN

1:05:24 Yeah, I like, you know, the ability to track your customers and be able to track their assets and be able to track quotes... deficiencies is great.

--- Pricing ---

JOHN

1:05:40 Okay.

ALEC

1:05:43 Yeah, that's the deficiencies is how a lot of our customers see a lot of ROI with service training. We kinda think.

JOHN

1:05:51 Yeah.

ALEC

1:05:51 We'll shoot if I can get one or two more quotes approved a month. I mean, it pay for itself. Yeah, the only question I have for you before I can give you an idea how much this cost. So, with those assets, the customer equipment, is that an active database you have right now or is that a database you'd be building with ServiceTrade?

JOHN

1:06:09 We would, we would be building it.

ALEC

1:06:12 Okay. Sweet. Cool. All right. So this is basically what you'd be looking at. So what I recommend for you guys is our select plan. It's our base level package. It covers you up to five technicians. So, I know you mentioned you want to get up to three. I don't know if the guys ever come over but you're covered up to five technicians. Basically in your first year total, you'd be looking at around seven brand annually.

ALEC

1:06:38 We do Bill annually. So basically what you're looking at in your first year, is there's an onboarding with that onboarding? Is you'll have implementation specialist. Their job is to take your data. It's a collaborative thing. We take your data, get it into service trade, make sure you like the way the data looks. Their job is also to train your office staff and your technicians on how to use the system. So we have some programs to help you make sure you're using the system correctly. You can also have a weekly meeting with them if you want to ensure the projects going on schedule. Typically customers of your size. It takes them about six to eight weeks to get live with service trade. So I know you mentioned the October first day a little bit earlier. I didn't want to talk about that till now just because I wanna make sure there's value there.

ALEC

1:07:29 But essentially, you know, a lot of other mechanical contractors want that date as well. So for example, I believe this would get you if you had this date. So for example, we have three left for this 10 one that you live by the end of November.

JOHN

1:07:47 An example.

ALEC

1:07:49 So every in the they're typically every 15 days. So if you did 10 15, you'd be live by December fifteenth to make...

JOHN

1:07:58 It take the 30 days. What, what is that delay? Well, I...

ALEC

1:08:06 Delay. It's just, it's more of there's just a process to getting live that just takes time. So really it's just basically if you have that 10 one date, really the first two to four weeks, it's just data migration, making sure you like the way the data looks in service trade, making sure all that's coming over the second phase is training, making sure your office is trained tech are trained, use of, use, case testing that way when you go live, you're not completely jumping in the.

JOHN

1:08:36 Right. Yeah.

ALEC

1:08:38 But we have had customers onboard quicker. So we have had some, you know, onboard within four weeks. But I'm just all about setting expectations that most of

them and take six to eight weeks with six wider side.

JOHN

1:08:50 I feel like we're a much smaller company than what you guys are used to. I mean, not used to, but I, based on what I see here, you're servicing big companies that have lots of different locations, lots of tax, you know, and we're just two tax. So it's not as much and this is just not as much information.

ALEC

1:09:15 Yeah. And, you know, our small shops do typically onboard quicker, right? And like you said, we do work with some.

JOHN

1:09:22 Companies.

ALEC

1:09:22 But we also do work with a fair amount of small companies. I mean, we work with companies with two trucks on the road then you know, five in the 500 as well. And that's some of those smaller companies really like using service trade because it gives them that big brand appeal with the quotes and kinda gives them that good branding that they want. But then after your first year, once you're done with that onboarding, this is basically, you'd be looking at 53 40. So that's kind of what you're looking at.

JOHN

1:09:51 Okay. Jackie has to jump out because she's gotta do payroll.

JOHN

1:09:53 Thank you.

ALEC

1:09:54 Okay. So you, Jackie.

JOHN

1:09:55 Yeah. Okay.

JOHN

1:10:03 All right. Let me just see if I have anything. How about data storage? Is there unlimited data storage with you guys?

ALEC

1:10:13 Yeah. So we're a cloud based system. We use Amazon web services, which is the same thing like netflix and hulu banks use. So no limit. Some of the attachments.

There might be a maximum amount of data, but it's nothing crazy like most of your stuff like that.

JOHN

1:10:29 Okay.

JOHN

1:10:30 Is there any other fees associated with your service like maintenance fees or I know, you said for the payments, there's nothing for that company, but there's the fee for the credit card.

ALEC

1:10:51 Right, right. And that's not something. I mean you're technically paying it but you're not like you're just paying it per Bill?

--- Pricing ends ---

JOHN

1:10:59 But I...

ALEC

1:11:00 Can pull that up real quick. But in short, no, what I will say is that we work with a lot of companies like yours. So we do have other products too. I don't really think you need any of them based on our conversation today.

JOHN

1:11:12 Right. Yeah.

ALEC

1:11:13 But you know, sometimes if people are having a good experience and they're like, well, how else can ServiceTrade help or business they might, or other things?

JOHN

1:11:20 Right, right.

ALEC

1:11:21 There's no like hidden fees or any, that getting with this is all your support, your, you know, account manager or stuff like that, right? Let me see. I.

ALEC

1:11:39 Here we go. All right... should be great. Yeah. Okay. And I can send you this too. So you don't if you don't want to write this down, but this might be a cool little blank to check out. This is our support page as well. So, some of our customers, they just go in here to figure, I know for me personally, if I can't figure out something,

sometimes I go in here and figure out, okay, but essentially, so with visa mastercard and discover you'd be looking at two point seven, five percent, 30 cents per transaction.

--- *Wrap-up* ---

JOHN

1:12:14 Okay.

ALEC

1:12:15 Pretty standard stuff. Ach, is a lot less, yeah, that's kind of what you?

JOHN

1:12:22 Okay. All right.

JOHN

1:12:25 Yeah. If you could send that to me just so I have it. Yeah.

JOHN

1:12:29 Yeah.

ALEC

1:12:30 I'll put that in my notes so I can, because I'll send you guys a recap. E-mail.

JOHN

1:12:35 Okay. It'll...

ALEC

1:12:36 Have a quote that I went over with you today. I can put this in here.

JOHN

1:12:40 Okay.

ALEC

1:12:41 Recording, I don't know if John was the one that walked in here or not, but if he wants to look it over when he has some time.

JOHN

1:12:46 Okay.

ALEC

1:12:47 I can look it over.

JOHN

1:12:48 Okay. I...

ALEC

1:12:49 Thought about saying, hey, but he seems kinda occupied.

JOHN

1:12:51 Yeah, I mean.

ALEC

1:12:57 But, yeah. So as far as your guys is a...

JOHN

1:12:59 Valuation, I mean, how...

ALEC

1:13:01 How many more softwares are you guys looking at? Like, I mean, it seems like you've looked at quite a few already. I mean, how many more are you gonna look at?

JOHN

1:13:09 Two more?

JOHN

1:13:14 Yeah.

JOHN

1:13:14 So, for like if we decided to do this for customer support, would we have like our own dedicated customer service person? Like if something came up, how does that work? Yes?

ALEC

1:13:34 So, when you're implementing, you have an implementation point of contact, they're your project manager, once you go live, you have an account manager who will be your first point of contact?

JOHN

1:13:43 Okay.

ALEC

1:13:44 So, you can have meetings with them if you're like, you know, one of them is named McKenna, if you're like McKenna, I can't figure out how to do this. Can you help me? You know, you can hop on with them kind of.

JOHN

1:13:55 Okay.

ALEC

1:13:55 But we also have support too. So, if you want to submit a support ticket or something like that, I believe last study we ran, we're usually getting back to the support tickets between 30 minutes to an hour.

JOHN

1:14:08 Okay.

ALEC

1:14:08 It's kind of a two toned approach. And then like I kinda just showed you that support page is like the third line of defense. So, if you want.

JOHN

1:14:16 Right.

ALEC

1:14:16 Go in there and look through things, some of our customers.

JOHN

1:14:19 Okay. And last, but not least, we don't we have Quickbooks desktop, not the Quickbooks online. Is that an issue? Like... do you have any issues with that?

ALEC

1:14:36 No, we integrate with both of them pretty similar integration. They're a little bit different.

JOHN

1:14:43 Right.

ALEC

1:14:43 I'd say about 50 percent of our customers are using Quickbooks and a good amount of those are taking advantage of the integration.

JOHN

1:14:51 Right.

ALEC

1:14:52 Basically how they use it is they're using service trade from the minute they dispatch all the way up to the invoice?

JOHN

1:14:58 Yeah. And...

ALEC

1:14:59 Then all they really wanna do is push the...

JOHN

1:15:01 Right.

ALEC

1:15:01 Financial information for accounting reporting.

JOHN

1:15:04 Yeah, we.

ALEC

1:15:05 Can do that and I'll put some videos in the recap emails. Well, if you want to look over those and how that looks.

JOHN

1:15:13 Okay. Great.

JOHN

1:15:18 Okay. Well, this has been helpful. I appreciate you taking the time... and yeah, we'll be in touch. I'll let you know either way, if we want to continue to pursue this or not.

--- Next Steps ---

ALEC

1:15:33 Okay. Gotcha. Do you have an idea on when you'll know?

JOHN

1:15:37 Probably towards the end of next week.

ALEC

1:15:39 Okay. I am getting kind of a little bit busy as it was to start getting towards September. Is there any way we could just schedule a brief 15 minute phone call? I

don't even have to be that long and get an idea if you guys still want to explore this or not, if you do what we need to go over to help you make a decision, if.

JOHN

1:15:58 Yeah, that's fine.

ALEC

1:16:00 Okay. Does Friday or Thursday work better for you?

JOHN

1:16:03 Next next, let's see next Thursday would be better. The 30 first?

ALEC

1:16:11 Okay. Do you have a preference afternoon morning or?

JOHN

1:16:19 Do you have?

JOHN

1:16:19 Anything at like 11, we could do a quick call?

ALEC

1:16:24 Yeah, yeah. You're eastern, right?

JOHN

1:16:26 Yeah, we're eastern. Yeah.

ALEC

1:16:28 Okay. Yeah, I could do that and would you prefer to do a phone call or a Zoom? I can just do a phone call if it's easier.

JOHN

1:16:33 For right now, let's plan just on a call. And then if I want to change, we could do Zoom, I'll...

ALEC

1:16:41 You...

JOHN

1:16:41 Know if you don't hear from me, let's just plan on speaking on the phone.

ALEC

1:16:45 Okay. That works is the number I think I had for you guys. One sec. I had two, three, nine, nine, four, four, three, four is the best.

JOHN

1:16:58 That's my cell phone that's the best honestly.

ALEC

1:17:02 Okay. Sweet.

JOHN

1:17:03 And then...

ALEC

1:17:04 As far as the other ones you've looked at, if you don't mind me asking, I mean, which ones have you liked? Which ones have you not like, is there any that are still in the running? It seems like to me that you're kind of deciding if you want to do two separate softwares?

JOHN

1:17:16 Yeah.

ALEC

1:17:16 I don't know if you found, have you found anything that can do both that you liked or?

JOHN

1:17:21 Well, we, yeah, BuildOps and nowify are two that can, you know, nowify doesn't have the service side as you know, doesn't have what you guys have on the service side, but they have a very good job costing and BuildOps. We're still trying to just get a handle on what they can provide to us. So, those are the two others that are kind of in the strong contention.

ALEC

1:17:56 Yeah. And BuildOps, I know they have some pretty impressive technology and I know Aia billing is kinda in their wheelhouse.

JOHN

1:18:02 Yeah.

ALEC

1:18:04 The one thing I would be a little careful with them about is just the implementation. They have signed up a lot of customers. We have heard from people that sometimes they struggle to get people live. And we've also heard at times that they can be a little bit over promising on functionality. So if you do go with them, just

really make sure either one talk to a customer reference. This may be doing service in a.

<p style="text-align:center">JOHN</p>

1:18:31 To...

<p style="text-align:center">ALEC</p>

1:18:32 Just make sure really bedding out during the demo when they're doing, and I know it's tough because it's kinda.

<p style="text-align:center">JOHN</p>

1:18:38 Yeah.

<p style="text-align:center">ALEC</p>

1:18:38 Hypothetical, but I know that's you know, that is definitely their wheelhouse though. So it makes sense on why they're in strong contention.

<p style="text-align:center">JOHN</p>

1:18:45 Yeah.

<p style="text-align:center">ALEC</p>

1:18:46 I would just be careful with that because we've heard we've had some people leave us and then come back because of the implementation and we have had some people get over promise but I'm not trying to, you know, dig any dirt on them or anything because I know they have some pretty impressive technology that's pretty appealing. So that's some things that keep in mind.

<p style="text-align:center">JOHN</p>

1:19:06 Okay. All right.

<p style="text-align:center">ALEC</p>

1:19:09 Cool. Well, appreciate. It was a fun meeting with you guys.

<p style="text-align:center">JOHN</p>

1:19:12 Yeah.

<p style="text-align:center">ALEC</p>

1:19:12 I'll send you that recap e-mail...

<p style="text-align:center">JOHN</p>

1:19:14 Okay. Great.

<p style="text-align:center">ALEC</p>

1:19:15 And then I'll send you that calendar invite so that it's on your calendar for a call next week okay?

JOHN

1:19:20 Great. Thank you, Alec. Have a good day.

ALEC

1:19:22 Bye.

JOHN

1:19:23 Bye bye.

The End