GONG

ServiceTrade Demo with Murray Mechanical Systems Ltd

Alec Ashby with Murray Mechanical Systems Ltd
Recorded on 7/27/23 via Zoom, 1 hour 33 min.

Participants

ServiceTrade

Alec Ashby
Territory Manager

Murray Mechanical Systems Ltd

Jason Murray
Manager, Operations

Other

Phone Caller #1

Topics

Transcript

--- Call Setup ---

JASON

0:00 Don't seem to get any audio from you. Hold on.

ALEC

0:03 You're good. Can...

JASON

0:04 You hear me Alex?

ALEC

0:05 Yeah, I can hear...

JASON

0:06 You. I can't hear you... interesting.

ALEC

0:27 I just.

ALEC

0:34 What about now? Is it working now?

JASON

0:47 Got it. All right. Go ahead Alec.

ALEC

0:51 Okay. Can you hear me now?

JASON

0:52 Yeah. Got you now. Yeah, I just said that for some reason, it went to different speakers set up.

ALEC

0:58 You're good. Yeah, I know Zoom can be fun sometimes. Well, how are you? I know it's been a while since we spoke. How's the 2023 gone for you guys?

JASON

1:08 Busy, very busy.

ALEC

1:10 Right. Yeah. Most... most mechanical contractors I'm talking to right now are super busy especially with the heat wave going on. So I do appreciate you taking the time to speak with me today again. And is Matt or Hillary joining today or is it just you Matt?

--- Call Setup ends ---

JASON

1:28 Office? Hillary is here. Actually, I'm gonna have her come in and join us quickly. Okay. I'm kinda give you a synopsis of where we are right now. So we have committed, to disengaging from our existing system built space by the end of this year, this calendar year.

ALEC

1:49 Okay.

JASON

1:49 And so we're down to two systems to consider yours and BuildOps.

ALEC

1:57 Okay.

JASON

1:57 We've we reviewed BuildOps again the other day because it had been a number of months since we had talked to both of these platforms. And so anyways, to do our due diligence, I'm trying to make a decision by Monday morning just because I know, you know, we need to engage and then in that rollout process, right? And so, I believe both systems have their merits and just we wanna make sure because I think I told you before, this is a considerable upgrade in our financial commitment to a program. So we just wanna make sure that we, are doing picking the right program and both of these seem to have enough merit to consider. We just wanna make sure choosing the right one.

ALEC

2:47 Yeah, no, that's all pretty sound. And I did see your e-mail too about how you're kind of developing new divisions as well as just curious on why you're kind of putting the business in that direction. I know that like you're kind of bread and butter, it seems like it's a chiller, stuff like that. But now you guys are going to add an electrical division at a plumbing division, just curious on why you took the business in that?

JASON

3:11 Mainly for, in order for us to grow in this sector, our biggest competitors are all offering all of those trades and have been for some time and we've been able to manage by using, you know, good subcontractors but at the end of the day, post COVID the secondary, I like to call them secondary Jade because they're singular trades, plumbing and electrical, those contractors. They're just in our area specifically, very difficult to get. So our customers are putting pressure on us, to provide that quicker and under our own umbrella rather than providing them subs that aren't you know, aren't getting there to their needs or are not providing the, you know, with the services they need quick enough. So simply enough, I've gone to my two biggest subcontractors that I provide a lot of work too and pretty well said you either join us or I bury you because, I will take my customers back when I launch electrical and plumbing. So anyways, we're in negotiations with them right now to bring them under the fold, rebrand, our business, and provide those services. But I want to be able to keep them, from a financial and a service software point of view. I want to be able to manage them, and do reporting on them and monitor their growth at least for the first five years. So that's why, you know, whatever program we choose it would, you know, it's kinda critical if I can keep them, you know, keep it as a portfolio within the program.

ALEC

4:57 Yeah, because I was actually going to ask you about that. So I was a little when I looked at the e-mail so are you looking to like have that kind of ability in your service management software? Are you looking to do that in your accounting? Or where are you coming to that with? Okay?

JASON

5:11 Yeah, I wanna be able to do, you know, I wanna be able to, I mean, because obviously we can categorize our service, right? So it's mainly, from a reporting point of view. If, if the service call is an electrical based service call, and I'm choosing that as a category for my service under the service platform, I want to be able to report on everything related to the electrical, you know, anything in service and contract related under that, you know, that platform of electrical or that service choice of electrical, which again, because these programs are powerful enough mainly choosing, right? You know, what category or what file this is falling into, whether it's maintenance, whether it's service. And I'm assuming I can have the category of electrical service, plumbing service and hvac service when we're creating our work orders, correct? Or our job visits, we always call it work orders, but I think BuildOps calls it visit or job. What is, what is your, what does service trade call it again?

ALEC

6:16 Yes, we just call it jobs. It's what we call. And with that, are you like looking for like business analytics or are you talking more like high level mainly?

JASON

6:30 From a reporting point of view, I want to be able to separate, you know, what was my total maintenance revenue? What was my emergency service or typical service call in service related type invoice, revenue, my quoted repairs, revenue right? From, from the maintenance, what work is generated through quoting those repairs that we recommend? And then projects, but we don't do a ton of projects. But

with electrical and plumbing, we probably get into more projects. So again, just project based, you know, okay, well, how many projects did we have? You know, in each one of those sectors?

ALEC

7:15 Okay. But as far as is your bread and butter, your business still going to be the H vac side? Is that still what you want to be the forefront? Or are you kind of rebranding it? Yeah.

JASON

7:24 Okay. Well, yeah, we're rebranding as a trade services or service trade company providing plumbing, electrical? A.

ALEC

7:38 Okay.

JASON

7:39 Gotcha.

ALEC

7:39 And then I saw to, I don't know if you updated your website since the last time we spoke or?

JASON

7:45 No.

ALEC

7:47 Okay. So, I saw that you did get that built space portal. I don't know if that just didn't work. I saw those on your website now.

JASON

7:57 That still?

ALEC

7:57 Something important to you or I don't...

JASON

8:01 The portal is important, and was definitely going to be required with this new process with this new service software or whatever we jump in.

ALEC

8:15 Okay. Got you. So we'll definitely I can show you that again today. And just like I told you and Matt last time, it is a Wordpress plugin. I believe you have like a brother

or cousin that. So just as long as you know that cool. And then as far as, you know, a lot of the questions to be honest, I had prepared was, you know, I didn't know you were that committed to get off...

JASON

8:38 To build space. So it seems...

ALEC

8:40 Like it didn't work out. So as far as, you know, BuildOps, I mean, just curious, I know when we spoke last time you spoke with, I believe Rob, at least he services, he's actually renewing with us again. Did you ever talk to a reference from BuildOps that kinda does similar work to you guys? Is that something that, did you ever talk to someone that's use their software?

JASON

9:02 We have not yet?

ALEC

9:06 Okay. Do you plan on doing that or what's kind of your opinion on that? I guess?

JASON

9:11 I was hoping to get that before Monday. I just haven't been able to find the time to inquire with them yet on, you know, giving me an option of somebody within our sector that I could speak to.

ALEC

9:26 Right? Cause I know Bill, they're pretty good company. I mean, they've been, they're fairly new. I mean, we've been around 10 years. I think they've been around three years. Definitely some people using just some things to, you know, look out for if you do go that direction, is the onboarding? We've heard mixed things about that and make sure they have a structured onboarding process. Then I would really recommend, you know, getting a reference just to make sure, you know, I think you probably found your conversation with Rob, you know, last December, probably valuable. I probably want to do that with them as well if it was me, but I mean, obviously no time's limited.

JASON

10:02 Yeah.

ALEC

10:03 I make.

JASON

10:04 That happen. I get that.

ALEC

10:05 That... and then I guess the only other thing is, so you're pretty committed to moving off your current process. Is not really, it doesn't make too much sense to talk too much about your current process. But with your new vendor, what are like some workflows or things that you're looking for? Is it like the technicians side? I know with us, the big thing is like the deficiency loop. I don't know if you remember that like the technician reporting repairs, that getting back to the office for someone to quote it out? Like what are kind of the big workflows you're kinda looking for in a new software?

JASON

10:38 Obviously in the, from the field workflow, you know, everybody obviously has a really good app. So how that, how they process through... and maybe we can start there and you could maybe share your screen and show me again, how the text in the field, receive a service request or a job and, how they go through their process from the moment they're sent that job to when they're finishing it off and it's coming back to the office... go through that.

ALEC

11:18 Cool. And then I know I touched on this a bit on the portal is a big thing. But, is that customer? Is it look like you're going to be able to renew with them as long as you can execute on the portal? Just more out of is that looking like, you know, are you worried about that at all or how's that going there? Are a few? I'm worried about that.

JASON

11:33 I said that is not, it's not critical, you know, our day to day. I mean we're getting away from Bill space. So my day to day operations, of the service software is the most important thing. Okay? If, at the end of the day, I'm not providing a portal. I'm not providing a portal but, that was an important thing years ago and I still wanted to be at the forefront because I think it allows our customers, to get in and view history without having to, you know, bother the office for updates. And, and hey, you know, can you let me know what the last five service calls were on that unit? I want to be able to give them that option.

ALEC

12:10 Okay. That makes sense. And then one more thing. So I apologize. I forgot about this. So you mentioned projects for the electrical plumbing side? What does that look like? Are you talking year? Are you talking multi month? Are you talking complicated projects? Simple? Yeah, probably.

JASON

12:27 Probably nothing more than multi month like one or two month project. So if we're getting into that type of thing, you know, services still, I still want servers to be our core business.

ALEC

12:41 Okay. Because just to let you know, some things that have changed on our end, we've you know, acquired a couple of companies. I think we did at the time we were talking, but it was so preliminary. I probably didn't talk about it, but we did start developing some like project management capabilities in our platform. Now, we are a service management platform first, but we can do things like, you know, change orders, work in Progress, manage a budget as far as more advanced things like Aia billing or working with a lot of CS or a ton of sub contracting.

JASON

13:13 Yeah.

ALEC

13:13 We're not the best for that, but those simple one to two month projects with like complexity, we can.

JASON

13:19 Do that just so.

ALEC

13:21 And that's actually went live with our system to all of our customers last week. And our best customers are customers that helped us develop it. They've been kinda in beta testing earlier this year. So it's actually live now. And I'm definitely, it is fairly new. I'm not like the total product expert of that, but I could show you what that would look like if you just wanted to take a heap.

JASON

13:45 Yeah. I don't need to look at it. I trust, that, that's what you just described would be the, you know, the most we would need anyway. So that would work fine for us.

ALEC

13:54 Okay. Fair enough. I appreciate that. Cool. Well, anything else before we get into it? I do appreciate you kinda keep me up to date on what's kind of change with you guys? And, you know, I think that, you know, if your goal is to keep growing your business, I mean, we do have, you know, company meetings this week and we just had a customer come in here today and he signed up with us on three technicians. Now, he's at 42. Now, keep in mind, he's very intelligent, you know, very good business owner. I'm sure it's not all us. I actually definitely know it's not all us, but I just wanna make sure you know, that we are, you know, a vendor that helps companies grow. So that's you know, your goal to keep growing stuff like that.

--- Wrap-up ---

ALEC

14:33 We can definitely help you do that. We have, you know, multiple that have done that just like, you know, Rob. But anything else before we hop into it here?

JASON

14:41 No, no, that's good. Let's jump into it.

ALEC

14:44 Okay. So I'm just gonna give you kinda go through this pretty quick because I know you went through this a couple of times but just kind of, you know, give you up to date kind of what we're you know, telling folks now, but essentially what I had planned here for us today, JASON, I just want to touch on the portal first.

--- Wrap-up ends ---

ALEC

15:00 I know we went through it last time. I don't think we'll spend too much time there but just kinda giving you a refresher on what that looks like. We'll then focus mostly on the mobile app since it seems like that's kinda the forefront of your priorities. And then if we have extra time, we can go through whatever catches your eye or if we need to go through anything else we can do that. Does that sound good? Cool. So, JASON, we understand now that there's a 40 percent shortage of technicians in the workforce, basically, meaning that there's an eight percent loss of technicians in the workforce every single year. Now, what that basically means is that the gap between the, and for your work and the technicians you have on staff to do it is growing every single year. So what a lot of companies are coming to us, they want to control costs, whether that's improving their service operations, project operations, or setting up their technicians for success. You know, we can definitely do that, you know, reduce the administrative burden, you know, kinda get everything more efficient. But the cool thing is once you sign with service trade, what a lot of our customers find is that you can grow quality revenue, basically, meaning that we can help you sell more service agreements and grow customer profitability. And the keyword with this is quality revenue. I know you kinda mentioned running, you know, service line reports, stuff like that, you know, specific services, being able to pick what contracts are you performing the best on what services? Are you performing the best on? These? Are all things that we can definitely do for you. As far as this, you know, this is kind of the new way we've been showing customers how we can help them out. But this is our profit wheel. We understand that software. You know, you kinda mentioned that you're kinda taking a lift, you know, whether you go with us or BuildOps. So I definitely get that. But we wanna make sure that our customers are getting ROI. I'm gonna lightly touch on each of these. I don't wanna, you know, bore here with some long slides. But I think for you guys, it's gonna mainly be the technician productivity. I giving your technicians the ability to report more repairs, get more pipeline back to the office. And also giving them service histories that, you know, you guys don't have to deal with as many internal calls for the customer. It's not only the portal but other things you can send the customer, making your business the easiest business to do business with in town. And then I think for, you kinda mentioned on, you know, running reports on specific types of calls or specific service line and stuff like that. We can definitely give you that ability. Now, as far as us, like I said, you know, we've been now in the industry for over 10 years. Most of our people on our executive team have been here five to seven years with our CEO and obviously cto being here 10 years. They actually started this company, a company called Don, well, which was a commercial service contractor. So we're very familiar with, you know, what needs to work, you know, what doesn't you know, what's important stuff like that. And the cool thing is too is since, you know, we're a service first software, all of our, you know, product development budget, whether it's the funding or just our own success. All that goes to workflows, is going to benefit businesses like yours compared to other softwares that maybe do a

little bit more, you know, project management, heavy stuff or ERP or Construction software. All of our software goes to helping service operations. But before I hop into here, any questions on anything I just went through?

JASON

18:20 No, nope. You're good. Okay.

ALEC

18:22 Cool. And let me know if I'm going too fast or if you have a question or anything like that, just want to start off in the portal so you can have an idea of what this looks like. Again. I know you've taken a look at it. I believe one or two times. So just let me log in real quick. I'll kinda show you what this looks like. So the big thing with the portal, I know you kinda mentioned having the clients have an ability to see, you know, what jobs you guys have performed. So we can definitely do that for you. So if I go ahead and log in here... so this is our customer portal. Like I said, it's a Wordpress plugin. So since each customer will have their own log in, you're in control of, you know, what you want them to see. I don't have any jobs for today, but if they have any jobs today, they could click that. So we do have some upcoming jobs here. So I know you kinda mentioned them seeing what jobs are today or what jobs are upcoming. This portal is a very hyperlink friendly platform basically meaning like if I click on this to a number, I don't know if this, you know, jobs or memory or whatnot, but it takes them to a service link. This basically, you can send this before the jobs complete after the jobs complete, kinda gives them an idea of what you guys are gonna go out there to. Do, you know, who's gonna go out there? If, you know, who's going out there? Just kind of a way to make a marketing impression on them.

JASON

19:53 Yep.

ALEC

19:56 They can also see the completed jobs here. So they can look at those service links as well. And I think we went over this last time but they can't pay since you are in Canada, they can't our payment processor for our invoices isn't supported assuming that it's been the same and you still are sending one tax code, right? I think that's what you told me last time it's just one percent. You're not sending multiple tax codes. Is that right?

JASON

20:22 Yeah, just want to.

ALEC

20:25 Right. Okay. So we can still view the invoice. They just won't have that pay now, but they can view their invoices there too. Other things as well. We have our location so the customer can see all the locations you guys work at. So for example, I can click on this like cosco and Houston, just as an example, what this will tell them is, hey, what are any deficiencies or repair opportunities for you guys? But for them, like equipment that they use, that's deficient, if there's any deficiencies here, there'd be a way for them to click a link and then they could approve the quote. So like if they had

a broken compressor or a bad based or they could click a little link and take them to a quote. They can approve it there. Obviously, you could send it to, but it's just one extra way for them to approve the quote. Big thing with our platform, you know, since we were built for commercial service is we make it convenient for you guys to track the equipment. And the cool thing is that your customers can see this too. So not only can they see service history at the location level, they can also see it for a specific piece of equipment. And if they even want to get more specific, they can request service for a specific piece of equipment, they can see any history here. So obviously, this demo account is pretty bloated. There's a lot of stuff in here, but, you know, you can get an idea that they can request service at the location for the equipment or just a general service request and you guys will be notified about that as well. Okay. And then the last thing I wanted to touch on was just the deficiencies and quotes. So if they had any deficiencies, they can see those there. But they can also see the open quotes expiration date notice here. And I'll kinda get in this later their service lines as well. So they want to see all there's ways they can filter like I wanna see all my electrical stuff or all my plumbing stuff. We're really good at filtering that kind of stuff out. But similar to what I was just describing here, they can click on these links. It takes them to a quote. I think you remember from last time. This isn't the best example. I'll send you one that's a little bit better later, but they can go in here. Click on these approved Amazon experience. Easy to do. And then the last thing I'll touch on then, you know, if you have any questions, feel free to interrupt. But some of our customers like to leverage this as well. You know, especially when you're starting new lines of service, like for example, when you start, you might just have age back refrigeration or something like that. But maybe when you release or I don't know how you're kinda gonna go about releasing plumbing or electrical. You can let your customers know like from here that, hey, we offer new services now to.

JASON

23:13 That's cool.

ALEC

23:18 Any questions about all that? I know I kinda went through a lot there. I just wanna make sure I...

JASON

23:23 No, it's all coming back to me now. And yeah, I can see it looks like the, I like that.

ALEC

23:33 Right. And as far as functionality are the most important things you're looking for in a portal in this portal. Like is that kind of what you're looking for?

JASON

23:40 Yep. You hits all the boxes.

ALEC

23:43 Okay. Gotcha. Cool. Was it okay if we move from the portal and then maybe go out to the field now?

JASON

23:51 Yeah, fly along.

ALEC

23:52 Okay, sweet. So before we go in the field, just want to remind you of what a work order looks like in service trade.

JASON

24:01 More, this is in the desktop version.

ALEC

24:05 Right. So, this is, I'm in the office in the desktop, looking at a work quarter. This is what you're looking at.

JASON

24:11 Gotcha.

ALEC

24:12 So, you can see a lot of stuff here. So you can see the appointments, what we're here to do. You can even see the parts labor items that you're anticipating you're. Gonna use the big thing I wanna point out before we go to the field. And this is accessible in the field as well. Is one of the ways we save a lot of our contractors a lot of time. Is we give you the ability to track equipment at the location level basically meaning that you can track multiple pieces of equipment at multiple locations. So, for example, here, I'm pulling up this east rooftop unit three at a target, you can pull as much or as little information in here as you'd like... so you can, but filter size, filter, quantity, warranty date. But then you guys can go in here and see, you know, work order history quotes, the status of quotes, but really the way a lot of our customers see a lot of value from this is either one, if you have a portal, what you're gonna have, the customers can access this information, they don't even have to call you about it. But two, the technicians, they can now see this in the field instead of having to call you guys up and refer to past invoices or stuff.

JASON

25:24 Like that.

ALEC

25:29 Is that something important to you guys? Like tracking this equipment? I don't know if that's something you do now or something you're trying to start doing?

JASON

25:35 Is very important.

ALEC

25:37 Okay. Were you guys doing or trying to do that with space or how's that gone in the past?

JASON

25:47 Yeah, we were, but they just again, they weren't getting this in depth like we, our assets are obviously, we can see our assets and I can see work orders related to that asset. But, how they pulled that information together or pulled from the database was very cumbersome. It, it didn't have good filtering ability, nothing to this level for sure.

ALEC

26:19 Okay. Yeah. So yeah, a lot of our customers like this. So I think, you know, if you were to, you know, move forward with us, you'd see a lot of value in that. So that's good to hear. Cool. Well, unless you have any more questions, what I could do is I can go out to the field and I can start working on this job. Is there anything else you need to see here? Do you want to go to the field?

JASON

26:39 Is fine side of the field.

ALEC

26:41 Okay, cool. So give me a sec. I'm gonna go ahead here and stop sharing my screen and I'll start sharing my screen here. So while I'm pulling this up just so, you know, again the service trade mobile app, it can be used on iPhone or android. It can also be used on a smartphone or a tablet. Basically what you're looking at here, the work orders just for today. I now keep in mind we can filter this by all kinds of ways. But this is just to keep it simple for today's. Presentation. As far as this mobile app, there's essentially eight major tiles of information that your technician will typically interact with. I'm gonna go ahead and cruise through the main ones. But let me know if there's any that catch your eye right... down here at the bottom, we have three ways to log time completely up to you if you want to use all these or none of these, but we have job prep. We have in route kind of a fan favorite. You know, you can send it in route notification with your technicians picture on it. Just another way to get your brand in front of folks. And then we also have on site and if I clock in on site, what that's gonna do is take a GPS snapshot so it's gonna let you know. Hey, Alec is 322 Miles away from this target, might be a tough phone call.

JASON

28:05 Yeah. And then, and can that be mandatory or optional... or clocking in?

ALEC

28:13 Yes. So if you don't want them to use any of that, they don't have to. So it can be.

JASON

28:16 Still.

ALEC

28:17 Show up, they'll still show up at the bottom but they don't have to.

JASON

28:20 Yeah, but we mandatory where they have to clock in order to, start the appointment or start the job.

ALEC

28:28 Yes. So in short soon, so one thing we're rolling out in our road map soon very soon actually is something we like to call tasking. Essentially, what that's gonna do is like if you need your technician to take a before and after picture before completing a job, maybe leave a comment, you can put a set of like task.

JASON

28:49 Need to do.

ALEC

28:51 Before completing it, but it's also up to you if you don't want it to be that robust. It could just be something simple.

JASON

28:56 So option is not in there now?

ALEC

28:59 No, it's not in there now, but it's in beta, I believe.

JASON

29:04 Okay. Because we really do like that option. BuildOps actually does have that option, in their field app. So, I do recall that, and really kinda like that idea of.

ALEC

29:19 Right. And, you know, I get, you know, right? If something's not live, you gotta, you know, take that with a grain of salt, but I can send you a video to and a recap e-mail today. It kind of goes over our road map for what we've already done this year and what we're doing in the future. And in that video, I'll show you those tasking stuff. So you can kinda see a demo of that. It's in that little five minute video.

JASON

29:43 Yeah.

ALEC

29:46 As far as these eight major tiles of information, the couple of ones I'll go through real quick. So the services, obviously, you can see what services you're here

to do, what equipment you're working on. You can also see these site specific comments. So these can be internal to the office just for the technicians, text can leave. Comments can be a job comment. These are designed to limit that phone radio. So maybe an access code on the site or maybe there's someone you need to speak with.

ALEC

30:23 As far as attachments for the work order, like I said, if you needed to take some before and after pictures, you could absolutely do that. So we can take some pictures. A lot of our technicians. They really like the audio memos mainly because instead of typing out a bunch of stuff, they can always like leave an audio memo if they want to. So they can just say something along the lines of like, hey, I did this or, hey, we need to order this, something like that.

ALEC

30:52 Yeah. And then the assets so similar to in the office, it's kind of a similar thing, just more mobile friendly. We can see the asset pertaining to this appointment. But if the customer has a question or we need this information, for whatever reason, the technician also has access to all the assets you work at this location. And essentially, they can see all that information. So like the filter size, filter, quantity, warranty date, all that stuff down there. But they can also see service industry. So any, you know, work orders that have been previously completed, deficiencies, stuff like that. And obviously to, you know, in the office or the tech, you know, if they've had a broken compressor, maybe the last couple of times you guys went out or something like that, it kinda puts you in a position like, hey, it might make more sense to get a new unit. So that's another... any questions on anything so far?

JASON

31:50 No, no.

ALEC

31:51 Okay.

JASON

31:52 You're hitting it so far?

ALEC

31:54 Cool. Now, I know we kinda touched on this last time I spoke a bit, but like do we need to go through the fill able PDFS again? Or do you need to see that one more time? Or?

JASON

32:04 So that, so when they're completing this in the field. And this is a job. It's all fill able PDF that they're filling.

ALEC

32:12 So for most jobs, you can do it on this app. What some people use the billable PDF scores, for example, our fire protection customers, they use it for inspection forms. If you have like a PM checklist or something like that, they can fill out.

JASON

32:26 There. And so I'm assuming from the office point of view, we're building those checklists, and then attaching them to... the job. When we created.

ALEC

32:38 Yes. So, I'll just go through it real quick just so I understand. Again. But essentially the way it works is what they'll do is if they have a PM checklist for this work order, they probably will need it every work order obviously. But essentially... they click this view more details and they'll click this blank paperwork. Now, what this is doing is it applies these things called smart rules which essentially means like it can filter it by client or by something. Essentially, you have a choice so that they don't have to see all the forms you have in the system as far as how you get these in here. If you already have fill able PDF. Now, you can upload as many of those to the system as you'd like or if you'd like our team to do them. If, you know, give them to us. Basically cost 149 per page. Now, keep in mind what we classify as a page like let's say you have a two page form, but you're using it at like 50 different locations that's just two pages for us.

JASON

33:32 Okay.

ALEC

33:32 So for example, here, if I go ahead and just generate this form... essentially that'll take you to Adobe. So if I go ahead and click this here... from here, they can, you know, it applies those smart rules that I was talking about. So that asset name, the work order number, all that stuff automatically applies. All they need to do is go ahead and check these boxes. And then once they're done with that, they can push that back to service.

JASON

34:06 They gotta push it back manually. Now, there's not a like finish option automatically goes back.

ALEC

34:13 Right. So you just click these three dots and then I'll push back now. I know you talked a little bit with Rob about service forms which I don't really think you need from the jump but that is, you know, the bar version of our forms. And when they complete those forms, those automatically come back. But as far as this option, you just click those three dots, push it back to service trade. And then it lives in the paperwork section. Gotcha. But like I said, you know, most companies they're just using that for like specific PM checklist for your run the mail service call or even some of your PMS, you.

JASON

34:49 Might not even need to use that. So.

ALEC

34:51 Most of the work orders can just be completed in the app. So.

JASON

34:55 So there's 149 dollars. It's 149 dollars to build a page.

ALEC

35:00 Not to build a page because these are your forms. So assuming they're your forms to convert the form to fill able PDF, it's 149 per page. But like I said, if the page is used at multiple locations, we're not charging you for each location you're using that. It's just for the form. Okay? So it's just kind of up to you on.

JASON

35:18 How you want to go?

ALEC

35:18 About doing that. And we do have some companies too where they just do it themselves. It's not so much that it's difficult. It's just more it's time consuming. So it's just up to you on how you want to allocate that.

ALEC

35:37 But the last thing I want to show you. And this is the way that a lot of our customers are, you know, receiving anywhere from 23 percent growth to 37 percent growth year over year. One of the big things that a lot of our customers do well is something we like to call the deficiency loop. Essentially, we streamline the process of the technician reporting repair, you guys getting notified in the office in the office sending out a quote. So I'll kind of walkthrough that in a sec. So essentially I clicked on this deficiency tab. I'll click add deficiency. We know technicians don't like to do a whole bunch of writing or typing so they can put in a brief description of what they found. So I just put in a broken compressor.

ALEC

36:23 I then can see these attachments here. So here at service trade, you know, we think a picture is worth a 1,000 words. And actually that customer that just spoke to us about an hour ago, he said that if he adds, you know, two to five pictures to a quote, his chance of getting it approved are significantly higher. So we make it convenient for the technician to add those pictures, audio stuff like that. We then can select the severity of the deficiency. So I'm gonna say that the deficiency is inoperable, it's not functioning. We then can select the asset pertaining to the deficiency. So I'm gonna say this deficiency is pertaining to east rooftop unit three.

ALEC

37:09 Then I'll say that this is a new deficiency something I just found in the field today. And then if I save that, what's gonna happen is who's ever in the office that's

in charge of sending out these quotes? They'll receive an e-mail notification. That e-mail notification is gonna say, hey ServiceTrade founder, you know, quote, go send it. It's gonna have an exact link that they need so that they can send it to the right contact. Is that workflow is something you could see helping out your day to day kind of having a field for technicians to log repairs, get that, I don't know if Matt or Hillary or you send out those quotes, like how does?

JASON

37:46 No, no, that really helps me do that daily that process right now. We just take it manually from the work quarter that they're filling out. But again, they're really doing a field. We don't really have a field app in more with the field app that they switch to build space is just not doable for what we do. So we haven't been used.

ALEC

38:11 Gotcha. Yeah. I heard a little bit of what you're saying. I do, we do have a lot of people in the office today. So my internet is being a little bit slower than usual. But I think what you said, correct me if I'm wrong, is that there's a lot of like phone calls or just kinda places where it goes. And if you had something a little more organized, a little more streamlined and probably limit internal calls and maybe increase the amount of quotes you could get out quicker. I don't know this reading between the lines too much, but.

JASON

38:36 Yeah.

ALEC

38:37 Gotcha. Okay. So unless you have any more questions about this app, I'll go ahead and clock out here. So essentially, I'll mark this service as complete. And then I'll move this appointment to the completed list. And then if I stop sharing my screen here... and I start sharing my screen here... basically walk you through how all this stuff comes back on the back end. So... essentially everything comes back in real time. So obviously the clock events, any change changes, work, acknowledgements, stuff like that main thing I wanna point out is just the deficiency. It'll not only come in on this little bucket here that clearly organizes the deficiencies where they are, what they're about. But like I said, a lot of our customers like this e-mail feature. So essentially, you can choose how many people in your organization need to get this e-mail it's basically telling that person. Hey, this is the unit, this is the location, this is the person that reported it here's. The problem here's. The link to quote it out. So instead of, you know, going back and forth on the phone or, you know, trying to find it somewhere in the work order, we're sending out that customer that quote in real time.

JASON

39:59 Emailing directly through the web like through service trade or is it going through like outlook or Gmail?

ALEC

40:08 As far as the quote itself?

JASON

40:09 Yeah.

ALEC

40:11 Yeah. So it's going out of service trade. And then this is also what gives, your customers the ability to go on the portal because they'll see it in the portal as.

JASON

40:21 Gotcha. Okay.

ALEC

40:25 But anyways, here, you can see this deficiency. This is the one that we recorded. So if I wanna go ahead and quote this out, I'll just go ahead here and click add to quote... and I'll click create quote.

ALEC

40:44 Now keep in mind JASON, if this was, you know, relatively unique quote, you can always write up a quote from scratch, you know, manual description, manual, parts of labor items. But what a lot of our customers like to do is especially for like those broken compressors or those run mail repairs. We like to apply these templates. So you can apply as many templates as you want. So for example, here, if I go to apply quote template, I can go to a compressor replacement. These are the demo account templates. This will be your verbiage your parts, labor items. But essentially, the idea is that I can add this template. It's gonna get me about 80 90 percent of the way there. All I might need to do is make some slide adjustments. So maybe we don't quite like our margin. It's not quite up to 35 percent. I'm gonna go in and maybe update one of these prices or, you know, maybe the cost of things have changed. Whatnot we can do all that here also change the way it's formatted to your liking or whatever your customer prefers. But before I send that to you, JASON, just to give you an idea of what that looks like... is like quote templates and stuff like that. Would that help? I don't know if you're the one sending the quotes or if that's someone else. But is that something like are you guys quoting out a word right now or like your accounting system or where do you guys typically quote out?

JASON

42:04 I would say majority of our quotes are simply just an e-mail with a description of what was found on the last preventative maintenance or if it was a service request, and then some of the more complex quotes where it's more like a project based on not a project but, you know, a larger, you know, replacement of a large rooftop, or one system. And yeah, those quotes are generally done by, with just a simple word document that's got our letterhead and everything on it. I like this option much better.

ALEC

42:38 Right. Yep. And then, yeah, that's the cool thing. This is a really good for, you know, those repaired quotes, quick quotes. We do have, you know, other tools that can help you with those more robust proposals, probably be more helpful for you next year too, but that's where, you know, the, you know, Northboundary that

acquisition kinda comes in. But anyways, JASON, I'll just send this to you just so you can kinda, I know I kinda showed you in the portal, but this is going to be, you know, better quote pertaining to business that you do. So I just sent you that quote should be for our little fake company, or service. If you click you and respond to quote. Basically from there, you can approve it, take your time though. Let me know what you think. If you have any questions, just let me know.

JASON

43:24 Remember this from last time. Yeah?

JASON

43:35 Yeah, that's a great option. I like that. Okay. I just did that.

ALEC

43:58 Cool. Did you go ahead and approve it?

JASON

44:01 It was approved.

ALEC

44:03 Okay.

JASON

44:04 Should have come to you by now but.

ALEC

44:07 No, it did. I just like to give people their time to make sure they get a look at it. But essentially, you can see it's approved. I don't have to Chase down that customer po that's right there. And then from here, we can create a job from this quote or add it to an existing job. Do you think your customers would appreciate the quotes looking like that? Do you think that's something that would maybe help?

JASON

44:29 You guys get one?

ALEC

44:30 Or two more quotes approved? Or what's kinda. I know it seems like you liked it quite a bit.

JASON

44:33 Yeah, 100 percent. Yeah. So this is a great option.

ALEC

44:38 Okay, sweet. And then, you know, I know sometimes people tell me that, you know, do quotes through e-mail and there's a lot of people that do it that way that sometimes it's hard to track. So just to kinda give you an idea on how we could track those. We click this history button here for this individual quote. I can see the complete history, you know, what happens, the full history. If you send it, who's viewing it? Who approved it? When stuff like that cool thing is, I know you kinda mentioned reporting. We have this thing called a quote report. Now, I don't want to bore you the amount of filters that I could put on this. But essentially, and I might go a little deeper just because of the things you mentioned in that e-mail but let's say I wanna see all the quotes from June. I have a couple of options here. I could say submitted and viewed. And then I can also see submitted but not viewed or there's other options here as well. So, for example, if I click here, submitted and viewed basically meaning that the customer viewed it, they just haven't approved it pretty common especially with the people that you work with a, you can see all those here. You can see the totals on the right. So you can prioritize a couple of other things that I just want to touch on lightly. I know you kinda mentioned a desire to real have flexibility with a lot of these reports. So for example, if I wanted to see just electrical quotes, I could do that or if I wanted to see backflow testing quotes, I could do that. Or if I wanted to see chiller quotes, I could do that. I don't want to get repetitive there but, you know, you kinda catch the drift. It's like you can do that for service lines. And then you can also do it for job types too. So emergency calls or preventative maintenance, you know, there's a lot of different and a lot of these reports, you can filter it down and that's whether you're doing, you know, service trade, native reports or if you ever grow into like something like quick site that's kind of available to filter things by that and a lot of our tools, not just our reports. So, you know, you're kinda keeping track of what's what?

JASON

46:48 There's a tag option there. What's that?

ALEC

46:54 Would say, sorry.

JASON

46:55 To the right there. Tagged.

ALEC

46:57 Huh.

JASON

46:58 What's that?

ALEC

46:59 Tags to make this simple. I don't want to get to in the weeds here, but it's just a universal way to make things searchable.

JASON

47:06 So some of...

ALEC

47:07 Our customers...

JASON

47:09 Find it. We're gonna be ready.

ALEC

47:10 Like some of our customers just like to put tags just to make things a little bit easier to find. So for example, even for me, I have my demo account, my colleagues have their own demo accounts I put in, you know, don't delete my demo account. So there's all kinds of tags you can put on jobs quotes. The idea with tags is just to make things more searchable as well as if there's anything internally, like if you wanna like, hey put this tag on this. It's always an option too. But odds are that most of the things that we give you the option you will be enough. But then if you want more or there's something you wanna tag on, could absolutely do it. It's pretty popular feature. Gotcha. And then the other thing that's somewhat popular one, you will have a portal. So odds are you won't be having to do this as much because they always have access. But if you want to, you can always send these quotes out in bulk as well. So let's say that, you know, these four quotes have been submitted and viewed and you just want to get it out one more time because sometimes it takes two or three times getting it in front of their face, you can send that out. And odds are if you put a couple of pictures on it and you either have a portal or send it to them two or three times that's really going to give you the best statistical chance to get as many quotes approved as possible. That's really how a lot of our customers see a ton of ROI from service trade. So that's kind of that. Any, any questions on just quoting stuff like that?

JASON

48:33 No, it seems, do you want to jump to what the dashboard looks like the daily dashboard for service for like for the admin team?

ALEC

48:40 Yeah, yeah, we can definitely do that. So this is the dashboard as I'm sure, you know, this is what you'll see JASON right when you log in. So I'm gonna kinda go through these each individually. So first, we have a simplified daily schedule. So what's going on in the business today? We next have an overdue jobs without appointments. So essentially service trade makes it convenient to set up those preventative maintenance like is it a quarterly and annual stuff like that? ServiceTrade will let you know if you have any PMS overdue instead of those jobs in the cracks. But these could also be other calls to like emergency call stuff like that. So we can see overdue jobs out appointments... here. We can see jobs to appointments do in the next two weeks basically meaning that, hey, it's not due, but we're going to give you a heads up. So you don't miss. Now, these last two, the first one past jobs to be marked complete. That basically means that the technician is mark, the job is complete on their end. It's just going to review bucket for you guys to pass on billing... and then completed jobs to be invoiced. Like I said, assuming you have one tax bracket on, they can't pay the invoice but you could send the invoice out of

service trade. And then as far as getting that into your accounting system, it just be double data entry.

JASON

50:01 How question, how valuable is that set up? In other words, is it possible to add a step there for example, like right now, the way it works, and, we kinda like the flow because it puts one more set of eyes on it. Is, so when the job is completed in the field, it comes back as completed into the database. And then we have an administrator who goes through that and inputs, you know, the dollar amounts, the proper markups depending on the customer client, stuff like that, if it's not already preset... and kind of reviews what might have been quoted et cetera, or marked for quoted right now. We don't have as many. Obviously, we don't have the quoting option. So she reviews that and pulls that information out, to start preparing quotes. And then she marks that as what we call processed. In other words, she has processed it. And then I review the process and, you know, review wording to make sure you know, our stuff is not, you know, wording it incorrectly or not remembering that we were just there a week ago working on this. And maybe this should be warranty et cetera, right? And then I finished my marking that billable. And then our other administrator in the office takes it from billable. And, and just converts it into the invoice option, sends to the customer. So, is it possible to add a step in here? Whereas she's you know, the first administrator is looking at the completed job and instead of putting it right, the billable, there's a step in between.

ALEC

51:49 So in short, not on the dashboard, this dashboard is what like all thousands of our contractors are using or over a 1,000. But there are ways to accomplish that. Just not in the dashboard, couple of things based on what you said, there, one service trade does have pricing contracts. So your markup rules will be automatically applied if you want to set it up that way. Obviously. And I think you would.

JASON

52:16 Like depending on volume, right? Like, so we might have a customer who's paying X mark up for a product. But if the, if we're selling a lot of that product on that particular job is a large failure, we might discount that.

ALEC

52:31 Yeah. So the idea is that you have a contract, 80 percent of the time is going to be to a T, but then if you need to go in and make some adjustments, the cost or price, you can do that as far as that invoicing thing you kinda touched on. So I'll show you that real quick. So if I click completed job and I click complete job and create invoice, this might be what that staff member you just mentioned will be doing. So she's probably got to review the cost, make sure that it's all, you know, correct probably gonna make sure the right contract getting applied a multiple in our system. Once all that looks good. She can go ahead and do that. I'm sure she'd look at it one or two more times before passing on you obviously. But one option you do have. So I believe click this, you see the status put in here?

JASON

53:25 Yep.

ALEC

53:26 We can have okay needs review draft sent paid. There's different statuses here that you can set. So maybe she, what she would do is like review it. And then maybe you guys, would you should put it in like needs review like for you or something like that?

JASON

53:44 She puts it into needs review, then that would have me review it before it goes to billing.

ALEC

53:53 Correct. Yep.

JASON

53:55 And then, so that's fine. So where would I find those that need to be reviewed?

ALEC

54:03 Yep. So if you give me one sec, I believe if you go to like an invoice report.

ALEC

54:15 And let me, give me a, and run this report in a little bit. So let me see invoice status. So you would go to status and then you click needs review. And then you probably put in a time frame or something like that. So you could do status needs review. There's. All kinds of filters. You could run, you know, job types. We are kinda went over that.

JASON

54:37 Yeah. Okay. Yeah, that's workable. I could probably like I said, that's mainly my real only input into the system anyways, on a daily or weekly basis. Other than, you know, the reporting options. My day to day is mainly just reviewing the invoices before they're sent out. So so that's fine. I can work around that. And there's no sense making it more difficult for everybody else. Just keep it easy for them, and just give me a spot. I can search it. Like here is fine.

ALEC

55:12 Right. And do you guys like, how does your markups or stuff like that going now? Is that more like manual spreadsheet heavy or do you guys have a...

--- *Pricing* ---

JASON

55:21 Way to?

ALEC

55:22 Automate that a bit or how is that kinda?

JASON

55:25 Now, right now, for certain customers based on their contract, it's a set one percentage markup for all materials no matter what the price is for those that do not have a set contractual amount, we simply use a scale based up based on the dollar amount of the product of the part material, and apply manually in the work or?

ALEC

55:55 Okay. Gotcha. Because, the reason I just say that is I think if you had a way to automate that a bit, I'm sure there's always going to be human error and things like that. I think it'd probably be a little less of a concern for you, but I do think you obviously should review it before it goes out, but I'm just saying, I think what was her name again? I'm sorry, I kinda, I remember her.

JASON

56:14 Yeah, or, yeah.

ALEC

56:16 Okay. Hillary. Yeah. So, Hillary, you know, as long as she's applying the right contract and everything looks good, I think it'd make that a little bit more smooth. But yeah, if you wanna, you know, look it over that's kinda.

JASON

56:27 How you do it? Yeah, it's mainly I'm mainly reading it on the description of work done from the tech point of view, the markup and stuff. Like I said, that's fairly standard now anyways, I mean, the odd one I'm looking at just if it's, a larger volume invoice, you know, if it's an invoice, you know, for four or five or 10,000 dollars and I might review the materials and just give the customer my own little discount.

--- Pricing ends ---

JASON

56:52 But generally, my reviewing of the invoices before they go to the billable, is strictly what has been written by the technician to ensure that the customers under standing, what the job did and then we're not, you know, throwing ourselves under the bus... and to be honest, it also gives me an opportunity. It also gives me an opportunity to review how our technicians are learning our younger ones, you know, our newer technicians are prices that are, you know, almost a tech level. If I'm reading how they're describing the job and how they found their issue. It gives me, you know, without analyzing them in the field, it gives me an idea of their growth structure.

ALEC

57:43 Yeah. No, that's all great stuff. Yeah, no, that's great stuff music to my ears. So couple of things based on what you just said for a lot of your PMS, you can make the description. There's a way to like kinda automate that where in the field they're

seeing what they're supposed to do and then the customer seeing what you guys did. But I think, you know, obviously double check and make sure you like what the customer seeing is super important. That's why I know I showed you this in the beginning. It's kind of because I think what you're getting at is the person you're billing isn't always the person you work with on site, right? It's about telling the story. You don't want them to just see an invoice. Me like what am I paying for? You don't wanna deal with billing is?

JASON

58:24 I...

ALEC

58:25 Do, like I said, we do have like big company events this week. So I do apologize man being a little slow, but that service link, I showed you earlier that's gonna help you accomplish that a bit too. So essentially... yeah, one sec. Sorry about this. Essentially when this invoice pops up, it'll be pretty similar. So you won't have this pay now button, but you can do grand total or whatever you wanna do with that. But if they wanted, you know, a little bit more information when they click that service link that I showed you earlier that's also gonna paint the picture for that billing contact and it's up to you on what you want your customers to see. Like maybe you wanna want them to see parts labor items, or maybe you wanna want them to see comments, but, you know, if you want that customer see some before and after pictures or if you wanna work acknowledgement in there or you wanna give them a heads up that, hey, we found these repairs or, hey, this is what happened and who did it. And then, you know, also to something fairly new as they can also see, you know, how it all went down. You know, when they clock in, you know, who did what, you know, what was, the found, what were the pictures? And all this is permission based. It's you know, you don't have to show everything that you can kinda do that here.

ALEC

59:49 Cool. Well, I know we got about. Well, I mean, is there anything else you wanna see today or like, I don't know if there's anything else you need to. I could walk through real quick. How PMS are managed. I don't know if you remember that or not, but.

JASON

1:00:04 No, I think that, I think that's fairly straightforward. So, the only other question I have is the integration with account?

ALEC

1:00:12 Okay.

JASON

1:00:13 Integrates with Quickbooks. I'm assuming.

ALEC

1:00:17 Yes. So we integrate with Quickbooks online and we also integrate with Quickbooks, desktop enterprise stuff like that.

JASON

1:00:25 Okay. And what about Sage?

ALEC

1:00:28 So, Sage, it depends there's a lot of stages out there. I think, are you guys still on fit, thinking about getting off it or how is that looking?

JASON

1:00:35 Yes, we're on 50. Now. I think your system, if I were called supported 102 100 but not 50 or am I wrong?

ALEC

1:00:46 So it depends, are you on the Canadian version of 50 or are you just on the standard version?

JASON

1:00:53 I think we're on the Canadian version of 50?

ALEC

1:00:56 Okay. How familiar are you with the system by chance?

JASON

1:01:00 I'm not.

ALEC

1:01:01 Okay. Because I actually ran into this the other day. So essentially, I actually was speaking with another Canadian company a couple of days ago. So I asked, so we have an accounting lady. Her name is Tania. She helps all of our customers with... their accounting integration stuff like that, mainly pertaining to the Sage because she used to be a reseller, Sage thing about ServiceTrade. We have a lot of resources for people that have been in the industry. But essentially, what she asked me is when I asked her of this, she said if, and I'm not the accounting guy over here. Sorry if I sound a little naive, but she basically said that in Sage, if you can do a file, import a sales journal, I'll be honest with you. I don't really quite know what that means but if you can do those functions and I can put that in an e-mail it's a possibility. Do you guys with the systems you have now have an integration right now? Or do you not that?

JASON

1:02:01 No, there's no integration but I would like to have the integration. So again, I don't mind switching to Quickbooks but the, you know, but, if upgrading from say Sage 50 to Sage 100 or say 200, was required, that would probably be the better

option because it's just simply an upgrade of my existing system rather than a complete switch over to a new platform. I just, I know Sage has a newest version called impact, but I understand, I believe that's a very expensive program because it's a very high level and I definitely do not need high level but I probably could use an upgrade from 50. I'm just not looking to, you know, increase our cost that much, you know, more being we're already, you know, increasing our cost, you know, threefold on our service software. I don't wanna add a massive expense, to upgrade, our financial software, but, I believe Sage 102 100 is not a massive upgrading in capital. So I'd be willing, to do that. But that files, import sales journal. I will, I'll ask, we have a third party booking bookkeeping company that we use so I can quickly ask them... but you're not, but you're not sure. I'm assuming Sage 102 100 probably.

ALEC

1:03:35 So, in short, the way you're thinking what I'd probably suggest is going to 100 contractor according to Tanya out of the stages in that kind of range that's our best integration. I think that's through our partner. I dynamics that would need to be scoped out. So you would need to meet with her. That's the direction you wanna go in. Now, what I will say is that I believe 30 to 40 percent of our customers don't have an integration with their accounting system. We can definitely help out with the back end of stuff. But where you're gonna see the most ROI of service trade is the quoting customer experience, technician productivity, you know, accounting integrations are kinda icing on the cake especially if you've gotten so used to not doing them. So, I mean, if you're looking to save upfront, it might be best if you're uncertain if you're even gonna stick with to start out without one. But if you're kind of dead set on that and that's you know, kind of a I guess deal breaker, I mean we definitely could meet about that as well. But I'd say if you wanna stay on stage, ideally get to intact. But like you said, it is pretty expensive. But Sage, 100 contractor is probably what I would suggest if you weren't to go to intact and then, you know, Quickbooks is always an option too. But what you'll realize, I think you guys have big goals based on what I've heard from you today and some of the Progress I've seen since the first time I've talked to you. I think as you scale a lot Quickbooks isn't a scalable as something like Sage, but we do have companies that obviously have 30 technicians on Quickbooks. So it's just kind of up to.

JASON

1:05:07 Up to you. Yeah.

ALEC

1:05:09 Okay.

ALEC

1:05:13 Do you have an idea on, are you absolutely gonna do that upfront? Is that something you're maybe gonna deal with down the line later this year? Or what are you kind of the integration?

JASON

1:05:23 The, with the bookkeeping would be a later integration. Like, we would want to just roll out quickly and make sure that we're functioning from a day to day service point of view. The integration into the accounting is definitely not something that needs to happen right away.

ALEC

1:05:45 Okay. I think that's the best way to go about it to be honest because it's enough evaluating one system. It's like when you evaluate an integration, it's almost like another evaluation in some sense. But one thing I would be cautious of when other vendors tell you that we can integrate with this accounting system if they can't give you a couple of names of companies that are using it, but it's kind of a red flag. So just be cautious, you know, because I know obviously we have a ton of customers that are using Quickbooks integrating that, but we have a good amount of 100 contractor, a little bit more on.

JASON

1:06:20 Act...

ALEC

1:06:21 So just be cautious about when you're talking to other vendors especially if that's important.

JASON

1:06:26 Number one. Okay. Thank you for that advice.

ALEC

1:06:29 Yeah, no problem. Cool. Anything else as far as service trade though you need to go through today or?

JASON

1:06:37 No, I don't think so. I think you've I think you've touched on everything I needed to be reminded about.

JASON

1:06:47 Yeah, I think this is and what about building our customer base? If, if I'm able to, we're working with Bill space right now on how to capture all of our years of data that we've got stored with them? Are, are we able to import like a bulk import, of customers in order to, you know, simplify the process or speed up the process?

ALEC

1:07:18 Yeah. So that's something we take a lot of pride in one of the ways we kind of stand out from our competition. You know, a lot of our account managers are here in Durham this week. And the one thing I always hear from them pretty consistently, you know, customers are going to be customers, but we always hear great things about onboarding. So we do have a bulk import. So all we really need for your data is for it to be in an excel spreadsheet or access file and you can bulk import your locations equipment. All that good stuff. Now, as far as history, most likely, regardless of what platform you go in, it's not going to be seamless to add that history. So, what most companies are doing are either running two parallel systems. You know, there are some workarounds, you know, you can take screenshots or PDF, but really using those parallel systems and start building out that history. But there is ways to bulk import and it's a collaborative thing. We don't just give you the

system and it's like, hey, you know, figure it out. We just ask you to submit your data. We'll review your data. We'll import your data. And then when we look at, we'll have a meeting with your implementation specialists on, hey, this is how the data is looking like in service. Try. Do you like it? Do we need to make revisions? Stuff like that? That's easily the most important part of onboarding because usually if we can get the data in a clean and you like the way the data looks from there, it's smooth sailing. We've been doing this for 10 years and that's something we take a lot of pride in. So we try to, you know, obviously, you know, we need effort from you guys on your end, but we try to make it a collaborative thing where you don't feel like...

JASON

1:08:50 You're on an island so to speak? Okay. Yeah, that's exactly what I wanted to hear. That is important. We've got a fairly large customer base in having to rebuild that from scratch. Would take considerable amount of time and equity.

ALEC

1:09:09 And that's why I'm really happy to talk to Rob. I don't know if he talked to you about his onboarding experience. I know it's been quite a long time was the end of the year. You probably had financials and stuff.

JASON

1:09:19 Going on.

ALEC

1:09:19 But... I mean, so it's so valuable because at the end of the day, you know, you can hop on these demos and these platforms can look well, but if you can go live with it, it's only as good as it looks. So it's just, you know, it's almost more important that you go live with the system more than anything else.

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ALEC

1:09:37 But obviously, it's not that simple, but, you know, you just have to make sure that whatever vendor you choose that they have a structured onboarding process that's proven because some companies, they'll say, hey, we have a 1,000 customers. But the truth is that 500 of them are live and five 500 of them are still onboarding, but they signed the contract. They can recognize that revenue. That doesn't mean that they're successfully using the system if.

JASON

1:10:03 Yeah. Okay. So left, if you could send me an e-mail with just updated costing on, you know, the per tech user fee, I'm assuming it's a monthly fee, correct?

ALEC

1:10:19 No. So, we built annual. So I believe in the e-mail you confirmed that you would be at nine technicians and two helpers, just like last time.

1:10:27 Right now, yes, if we, when we bring on plumbing and electrical, that is gonna add to that.

ALEC

1:10:33 So.

JASON

1:10:33 You know, we're probably could be, you know, jumping up from, you know, 910 right now to, you know, to 15 plus. So like between 15 and 20.

ALEC

1:10:45 Okay. So basically how that works? So the price has not changed since the last time we spoke, which I believe is in Q4 of last year. Basically how that works is if you add a new division or new technicians, it's pro rated. So it's the same rate as last time. It's one 39 per month per tech build annual usd. So if you add them like six months into your contract, you basically just pay the remaining we're not the way it works. You can add a technician at any point. We're not gonna, you know, stare at it and try to charge your card. So that's something you review your account manager every quarter, you know, what users are using.

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ALEC

1:11:22 Are they users, stuff like that? And yeah, so it has not changed so that I can send you the quote again. But assuming it's the same quote that I sent you last time, it has not changed unless there's anything you want. Like, I know we kinda talked a little bit about the forms. It seems like the integration is something you just explore later so that.

JASON

1:11:44 Yeah. And the office admin or have a cost per?

ALEC

1:11:48 No, no. So the way our CEO Billy looks at it is, we understand the technicians are the one in the field creating a revenue, not to say that your office staff isn't valuable. They're super valuable obviously, but we believe that we shouldn't be charging you based off office users. So anything that I've done on this screen, we're not gonna charge you for. So you can have as many of these as you want. And cool thing is too is that, you know, you're also getting connected with a network of other contractors in the states and Canada. And there are a fair amount too that, you know, I actually signed up a company in Indiana who had a really successful onboarding experience and they're you know, at 14 trying to get to 20. So we have, you know, a lot of companies that have a similar size to okay. All right, well, that I think.

JASON

1:12:34 I think I've gotten enough out of this, to sit down with the team and do some comparative... discussions. And I'm not sure if I'm gonna have my decision by Monday or not now because you gave me a lot more to think about that I was imagining. I just had kinda forgotten to be honest with you most of it.

ALEC

1:12:59 Good. You're good. Now, I get it is based business.

JASON

1:13:04 Yeah, exactly. So, yeah, and especially for such an increase in capital for us to just, you know, normally don't put this much decision making into and is something because we're kind of a, you know, go with the flow. But at this point, you know, we've been struggling with the wrong system now for number of years and beta tested so many other systems. I'm just, you know, kinda tired of being a beta user, and so both ServiceTrade opportunity to not have to be, you know, a beta user spend more money and get into a much more powerful system that can work quicker for us on a day to day basis. So, yeah, thank you for your time. I know I was a little late getting on because I was on a phone call and I appreciate that you could dedicate this much time and I promised to have an answer for you next week for sure. And I will say it's actually a very difficult decision, but there are some features... that I really like with service trade and not having to pay for it in staff to run the desktop day to day one kind of pushes you to the forefront. I believe with BuildOps, it's per user and everybody's considered a user.

ALEC

1:14:28 Including it.

JASON

1:14:29 Staff. So that does that definitely separate?

ALEC

1:14:32 I mean, as you scale, I mean if you get more technicians, you might need one or two, more, yeah, so.

JASON

1:14:37 Exactly exactly.

ALEC

1:14:40 Cool. Well, I mean outside of price, I know you probably got to think about it. It's a lot to take in but I kind of where are you leaning at just for functionality? Like if we take the price out of it, where you kind of leaning functionality wise, you think?

JASON

1:14:57 I would say... functionality, it's pretty even other than the task option which you say you're rolling that out very soon anyway. So that definitely I liked the task

option just because, we want certain things done in the field before they're allowed to complete the project. And the task option obviously really makes that easy.

ALEC

1:15:26 The billable for.

JASON

1:15:31 I'm trying to wrap my head around that still because BuildOps doesn't really have a fillable form as a separate PDF. They're they're just fillable forms, within the program. So they just checklist that you create. And, and then you're tagging that checklist to each asset based on when that assets being service. So if it's a spring service, for example, that might be a different and checklists. So when you're creating the preventative maintenance reoccurring file for that asset, you're you know, you're tagging it based on the inspection time, and, the tasks that are following that asset based on when it's being done. So, I will be honest to say that option looks a little bit smoother, and quicker because it's not a separate fillable... PDF... but... I do.

ALEC

1:16:34 Let me, let me show you something real quick based on what you just said there. So that's just an option. You know, none of our customers are doing it that way. The only reason I showed you that is I know we talked about that last time but what some of our customers are doing as well as if they don't even want to deal with that. Like I said, the mobile app, most of your work words can be done on that app. And the way a lot of our customers are setting up their PMS something like this. So basically you can tie each PM to a specific asset, a specific service line, specific pricing contract. You can put a set of activities that they need to do. So I have, you know, five little boxes here of what they're supposed to be here to do, you can templatize this stuff as well. So you're not having to type this manually... scheduling frequencies at a quarterly annual, semi annual. Then what parts labor items are we typically using? And the idea is that we would set this up once and we forget it. So service tray will put it on a rolling clock so that you can, you know, go ahead and schedule it and stuff like that. But when the technician goes out in the field, I mean if you'd rather than just kinda go off this, they can do that too. They don't have to do fill PDF. Some of our customers do billable PDF, the fire protection space to fill up like an inspection form, or some kind of legalitic form or like for generators. But I mean, you could absolutely do it through here if you wanted to. It's just an option. I know we kinda.

JASON

1:18:04 We, I mean, we do put in a description now and it's probably a more in depth description now only because we built space, the first field app that they had... did have checklists associated, that were working. Okay, the problem became twofold. One, the first problem being if it was a large PM software couldn't handle too many assets being done via checklist. So it got really slow which obviously made it cumbersome, for the staff and the field. And then the issue was then, they changed that app to a different app and that different app just did not, it just didn't support the product properly the way we were used to doing it. So, unfortunately, the staff got away from doing checklists because it just became too difficult. So I would like to get back to doing checklists. Some simple checklist. It helps with our younger staff, you know, or newer technicians remember the stuff to do just having it in a list like

what you just showed there. They'll they'll read that once and forget half of it, right? So.

ALEC

1:19:24 That makes...

JASON

1:19:25 I've got a small checklist of four or five or six items that they have to do and check those off before they're allowed to finish, the work or the job in the field digitally. Then that, you know, it ensures every time that we're checking. And well, you know, I knew what I was here last time, so I knew what to do, but they forgot one of the key items, right? So, so having, the task there for them to have to complete... is really important. And the only problem, with a separate fillable PDF is that because it's a separate... process, are they going to do it? They'll do it if they can't close it off before doing it.

JASON

1:20:16 But right now, many of them have gotten into the habit because, the field app is became so difficult to use. They're all doing their work orders presently through the web version on their phone or a laptop, which means they're not always doing it on site now. Like for example, I've got one or two staff to come in early in the morning and sit here, in the lunch room at a laptop and do the day before as work orders. Well, what I, you know, what I don't like about that is, they're not doing a task or a checklist in real time on site. So how do I get back to that? I get back to that by having a really good functional app in the field which both of yours, both you and BuildOps have from what I'm seeing a great app, that gets, you know, all of those things kicked off. I will just say right now the task option leans to a better option for BuildOps than a fill able PDF. And that's probably it's probably why service trade has looked at the task option because my guess is they've realized that is an easier and quicker option to get certain tasks done without having to go outside, the, you know, the app itself to get something completed, right?

ALEC

1:21:42 No, that's all fair. And that, you know, that tasking is something that was requested for our customers a lot last year. So I'll definitely send you a video just so you can kinda.

JASON

1:21:50 Yeah, if you could, that would be great because it might.

ALEC

1:21:53 Do that. But yeah, and, you know, as well, you know, if you do ever talk to a BuildOps customer, I'd be curious if there's any that are using the tasking and, you know, getting a lot out of that, that'll be an interesting thing here too. And, you know, the other thing too is that, you know, the file is, I mean, I would recommend service forms for the jump, but, you know, there's a lot of companies that buy service forms and, you know, it's definitely, you know, a product that costs money, but there's a reason that people pay for it. We use a company local here called device magic. We

collaborated with them. I can send you a little bit of information. I don't really think it's worth it upfront at least just because I think you'll see.

JASON

1:22:37 Yeah.

ALEC

1:22:37 Such an uplift from the app and, you know, all the things we went over today, but I mean, that does give you that conditional logic. It does give, you know, certain things like they can report deficiencies in the form stuff like that. So we do have that. But like that tasking is coming out soon. So I'll send you a video on that. Cool. And then, you know, one thing as well to... yeah. Okay. Yeah, no, long morning. So I lost my train of thought there. But anyways, I don't really think I have anything else for you, JASON. Do you, do you think Hillary and Matt need to meet with me again? I wanna make sure that, you know, if you guys, you go on our direction, your team is comfortable. Do you think they need to meet with me again or do you think that?

JASON

1:23:27 I think we're good. Both of them remembered, especially Hillary. She remembered the, I mean at the end of the day, Hillary is doing the most, you know, our men team are doing the most in this program day to day. So she definitely remembered service trade. And, and to be honest, you know, at the end of the day, the processes are the same. How it looks, might be a little bit different. But at the end of the day, I think, you know, majority of the programs, I would say service trade and BuildOps of all of the, you know what I look at service tighten?

ALEC

1:24:10 That was one thing I was gonna say a lot of the people over at BuildOps, they used to work at a service tighten and it actually started out as like an electrical project management software. Now they are local to California. So that gives them a lot of access to funding.

JASON

1:24:25 Yeah.

ALEC

1:24:25 But they weren't a service management software first. They were a project software. They obviously have some smart people over there, and they have some pretty cutting head and technology, but, you know, we've received multiple rounds of funding too and, you know, we've been doing this for a while.

JASON

1:24:40 Yeah.

ALEC

1:24:41 There's no, yeah, no, but I do agree though. I think, you know, the two you've kinda narrowed it down to are probably the best in class to be honest with you.

JASON

1:24:49 Yeah, they are by far.

ALEC

1:24:51 Both.

JASON

1:24:51 Both programs hit all the boxes that we were looking for. Really the there's not a huge difference between the two. I think the flow is relatively the same. Like I said, the look looks a little different, but other than that, I do like that service trade, you know, is a trade based company and that's how it started... and that's important as well. So, you know, I will say I'm leaning a little bit more towards service trade. Now now that I've been reminded of it again, I'm really glad I reached out again and I was, and I was upfront with BuildOps as well. I told them that, you know, the service trade, was our other program and that, you know, that we needed to review both. So I just, you know, my mind is kinda going 100 Miles an hour now as I'm just trying to, you know, review both. And again, and I will say cost will still come down to it as well. You know, at the end of the day.

ALEC

1:25:54 That's actually what I wanted to touch on briefly, JASON, I can show you... what it will be. But one thing I will say is that, you know, if you kinda see it is somewhat similar like there's just, you know, it might, you know, BuildOps does from time to time kind of do a race to the bottom thing where they might get pretty aggressive with discounting. It gives me a little bit of flexibility. Like if you really like our program and you're leaning to us and I don't by any means want you to make a decision today. I want you to, you know, talk to your team. I'm not talking right now obviously, but I'm more than happy to, you know, sweeten the pot for you because that, you know, you talking to BuildOps gives me the most flexibility out of any vendor.

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ALEC

1:26:40 You're talking to this one of our biggest competitors. I don't wanna make it all about price though. I definitely wanna make sure that helping your business grow helping your technicians become more productive. Is that the forefront of the deal I don't want to just, you know, price, you know, just go as low as possible on price. Obviously, I'm flexible. I'm not afraid to give you a deal, but I'm just saying more of like that does give me flexibility. So I don't want you to go to BuildOps. They give you a discount, I'm flexible.

JASON

1:27:08 So depending...

ALEC

1:27:09 On, you know, what you kind of do, I more than having...

JASON

1:27:13 To be flexible whether it's...

ALEC

1:27:14 You're still deciding or like, hey, we're going with service trade, but the exchange rate is tough. I get it. You know, you're paying you?

JASON

1:27:21 I'm more than happy to you.

ALEC

1:27:22 Know, help you.

JASON

1:27:23 I didn't killed as, you know, we're definitely getting killed with the Canadian dollar. 32 is 32 points on every one. And yeah be completely transparent. BuildOps had told me their original price per user. And then within a couple of hours, of our demo re, demo, the other day, they did drop their price per user, you know, obviously trying to entice me to make a decision quicker. So, you know, I do have them committed right now, to a discounted price. I just, at that point, you know, said I still needed to review service trade. So yeah, obviously any flexibility you've got considering our Canadian dollar would obviously be appreciated. And, and yeah, like I said, at the end of the day, I will be doing the, you know, what my overall cost is based on the two and that is part of the decision making. So if you, if you've got some flexibility there would definitely appreciate it. And you wanna, you know, throw me an e-mail so, you know, so that we were on the same page, then that would be great.

ALEC

1:28:29 Yeah. And I think regardless of how we structure the deal, if you guys do move forward with us all have flexibility. But one thing I will say are you open to like a two year commitment by chance, you pretty committed to a one year only reason I ask is that if I go to my, you know, on like BuildOps, we have a pretty structured process on how I get discounts approved, who I go for, what kind of discount or not? I don't know what BuildOps to be honest, but kinda just based on what you just said, so like if you're just, you know, just want a one year, I still have flexibility. But if I have two year, I definitely have more. So I'm just, you obviously don't pay for the full two years up front.

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ALEC

1:29:07 It would just be the one year after, but just curious if that's something you're open to or at least understanding your options or?

JASON

1:29:16 Yeah, we would be definitely open to multi year. We, you know, we've never really had any of our platforms, you know, or anything shorter than, you know, six or seven years. Like I said, for the first few, we were beta users on both and we eventually went back, to build space. And, you know, just the fact that we've been suffering through this the last three or four years as they changed the platform on us is kinda, you know, evidence enough that we're not, I'm not gonna commit this kind of money, and then be jumping ship. You know, we generally kinda go all in, and make sure that we can work with the system and, you know, and if the system is willing to work with us then, you know, I don't I've been struggling with this for 15 years. I don't want to change. We, we did the first, you know, FieldEdge and we did Wintac for 25 years, right? So, you know, we stuck to that system even though it was well past it's time. And then we switched and I did look at FieldEdge because of course, they on Wintac now or in tech and we were with them for so long, but I just, I found that, they didn't quite hit all the boxes like service trade and BuildOps does. So we didn't but yeah, this is definitely a long term commitment. Whatever one, we decided to choose for.

ALEC

1:30:38 Sure. Okay. Well, I'll just, you know, we are pretty busy because full disclosure, we do have like a lot of company events. I was just able to kinda squeeze.

JASON

1:30:47 My schedule. I appreciate that.

ALEC

1:30:49 Talk to you, but I'll send you a retail quote today, just so you kinda know the ballpark, it's the same one as last time though just so you know... and then I'll I don't know if I could get to it. I'll try to get to it Friday. I think I can, but I'll try, I don't know if I can though I'll give you some options, maybe three year, two year, one year, something like that just to see what, you know, what kind of your options are depending on your commitment. And then what I will say though is if you do go with us, you know, similar to Rob or other companies we work with, you know, you're going to be happy. I can't say that now, I understand you're gonna do your due diligence, but no, we do have a 95 percent customer retention rate. So basically, meaning if 10 companies go live with us, you know, nine stick with us. Long term can't be perfect. Reason. Is we're really picky with who we work with and you're definitely the type of people we typically work with, but I do understand there's other stuff out there. You gotta do your due diligence. And, you know, you've had some bad experiences which I get and I'm sensitive to that. So just wanna make sure though that, you know, you understand that, you know, we're definitely gonna take care of you if you do go our route, but sure, any sales guy would tell you that regardless. So I understand taking that with a grain of salt. So anyways, what I'll do is I'll send you a recap e-mail some time today. I probably will be later from being honest. I have a retail quote that tasking video you want. I'll have this demo recording if you want to review that with your team.

--- Next Steps ---

JASON

1:32:15 That be awesome.

ALEC

1:32:16 If there's anything else, I might put a couple of more things in there. If there's anything else, feel free to reach out to me. You think it makes sense for me to maybe reach out to you Monday morning?

JASON

1:32:24 No, Monday morning for sure, please?

ALEC

1:32:28 Okay. You wanna do 10 am nine a. M. What do you think would work best?

JASON

1:32:33 10 a. M would be fine?

ALEC

1:32:35 Okay. And is calling you on your cell the best way to reach you? Or is it better to call...

JASON

1:32:38 Office? No call myself that works?

ALEC

1:32:41 Okay. Cool. Well, I'll send you a calendar invite for that as well, but I'll look forward to talking to you. Like I said, I'll go talk to my people after at some lunch here, kinda see what I can do for you. And I'll have some, hopefully, I'll have something in your inbox Friday, so you have an idea what?

JASON

1:32:55 Can do. Great. Thanks, Alec, appreciate it.

ALEC

1:32:57 Yeah, no problem. Thanks, JASON.

--- Next Steps ends ---

JASON

1:32:59 Okay.

The End