ServiceTrade Demo with Crete Mechanical

Daniel Geary with Crete Mechanical
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Participants

SERVICETRADE

Daniel Geary
Territory Manager

OTHER

Phone Caller #1

Topics

Transcript

DANIEL

0:00 Good afternoon. This is Danny.

PHONE CALLER #1

0:01 Hey, Danny train.

DANIEL

0:03 Right. Hey, nice to meet with you. How are you today?

PHONE CALLER #1

0:05 Good. How are you? I'm doing?

DANIEL

0:07 Well, I appreciate you taking the today's meeting.

PHONE CALLER #1

0:10 Yeah, of course. Thanks for taking the time.

DANIEL

0:13 Yeah, of course. Absolutely. So, Franks give you a quick rundown on... on typically high run my meetings first and foremost, I want to learn a little bit more about you and your company. You know, maybe some of the goals and... and... and the... the things that you guys are trying to achieve within the software. And then I'll give you some background on how other commercial service contractors use service trade to... to manage your day to day business. And then we'll hop into a presentation. Sound good?

PHONE CALLER #1

0:39 Yep. Perfect.

DANIEL

0:40 Great.

PHONE CALLER #1

0:41 So, I do have a little bit of background.

DANIEL

0:42 Aaron, I'm Aaron had mentioned that.

PHONE CALLER #1

0:46 You want that?

DANIEL

0:46 Started your company a few months ago, and you're in the process of acquiring some commercial contractors or service contractors... and you're looking to almost rapidly grow it from, it sounds like grow your company where you have maybe five or six different commercial contractors underneath your vertical. Is that... is that we're do I have that understanding? Correct? Or?

PHONE CALLER #1

1:09 Yeah. Exactly. We... we started this business about four months ago. We bought our... first... first acquisition, Denver in October, but another business in November and showing North Carolina, another business in New Hampshire in December, another one in Minnesota in January, and then we have four or five others kind of under LY. So we should be at, you know, 10, 15 businesses by... by the end of this year.

DANIEL

1:37 Good for you.

PHONE CALLER #1

1:38 Guys. What... what brought you to this?

DANIEL

1:41 At this point, is this, can you give me just a little bit of background about yourself? Are you?

PHONE CALLER #1

1:45 Yeah, sure. My... my background and my... my co-founders background is in traditional financing and private equity investing. We... we did that in... in Europe for a number of years, and then we started a... a roll up in the visionary services space. So, so we were owners of a company called alliance animal health. You can look us up on online, believe that... that business has about 90 that hospitals and it's an umbrella costs 15 states, Jake and I and our third a business partner to kind of grow that business starting in 2017 to... to where it is today. And then we... we hired a professional management team to kind of take over the day to day operations so we can focus on the second platform that we're building in the mechanical services space.

DANIEL

2:36 Not way. Nice. Well, that's kudos to you guys that sound?

2:39 Thank you.

DANIEL

2:40 For growth. What brought you to the... the commercial mechanics?

PHONE CALLER #1

2:43 Space. Yeah, I mean, it's you know, we, we've kind of had H fac on our radar for a while as an interesting space to... to look at your very fragmented industry. You know, it's service oriented local businesses and... and you, we originally started in the residential space, but right now that market is super hot and people are paying, you know, pretty astronomical prices for individual assets. So we... we decided to look spend more time on the commercial side with is not as much competition there's. Still, you know, a decent hand for buyers chasing after the assets but nothing like the, what... what you're seeing on the residential side. So, so, but... but, you know, love the similar tail wins and... and... yeah, so it's we've... you know, we... we decided the commercial space is... is more attractive to us from a kind of return on investment perspective. So that that's kind of how we started here. Our platform is built on your partnerships. We... we never buy 100 percent of any business we buy anywhere from 51 to 90 percent. So enough to have a controlling steak, but also give the seller or one of the, you know, owner operators have continued investment and skin in the game going forward. So it's very much kind have a partnership model. And then we at Crete mechanical group provide the, you know, call the core back office and service functions like finance, accounting, payroll, HR, it marketing cetera.

DANIEL

4:15 Okay. Gotcha. And we... and we agree with you 100 percent as far as when... when you separate the commercial from the residential industry, right?

--- *Type of work* ---

DANIEL

4:26 Service trade was specifically built for the commercial service contractor. And a lot of that is because of that financial standpoint where commercial contractors have an ongoing relationship with their customers, right? You're going out offering quarterly semi annual... annual PMS and you want that customer for life where 60 40 on the residential side to go in, there, you try to upsell the customer, get out of there.

--- *Customer engagement* ---

DANIEL

4:48 Maybe you'll hear from him five years. So when it comes to just generating revenue on a consistent standpoint, that's where we come into play for our contractors, that, that's something we help them do really well is continue to grow their revenue and engaged in the customer relationship. As far as your...

--- *Customer engagement ends* ---

PHONE CALLER #1

5:04 And what... what, what's kind of the... the typical size of companies that... that you guys work with? I'm... I'm sure it varies and there's a wide range. But if you had a point.

DANIEL

5:14 Yeah.

PHONE CALLER #1

5:14 I'd say about...

DANIEL

5:15 Like 20 percent 20 percent of our contractors, mechanical contractors are somewhere between 10 to 20 technicians, then the other, you know, 60 percent would be somewhere between 20 to 40. And then we have it on slot of customers like yourselves that have multiple brands, multiple locations and they have anywhere from 100 to 300 service technicians underneath their belt. So.

PHONE CALLER #1

5:39 Got it. Got it. Okay.

DANIEL

5:41 And, and what you have actually what... what you guys are presenting, we've seen a lot from our existing client base and even a couple of new customers come on coming on board where they've taken some opportunity amidst the pandemic to seek... seek out.

--- *Type of work* ---

DANIEL

5:54 I don't know struggling. This is the right word but just businesses that... that they see they can add some value on zoo. So now, you know, they have five, six, seven, eight brands underneath their header. Yeah, that's all stuff that we do very well. And... and again, that's kind of one of the biggest differences between commercial and residential software is being able to manage all those brands in one platform, have complete visibility and insight over your revenue and everything of... of that nature, but still be able to manage all those locations separately. But from the same place if that makes sense.

PHONE CALLER #1

6:27 Yeah. Exactly. It's that... that is our... our model and... and, or your customers more on the kind of service, preventive maintenance side or more contractors or what, what's the, you know, mix, what... what... what is, have the... the revenue makes for your commercial customers?

DANIEL

6:44 Yeah, revenue mix is about 90 percent service and 10 percent project and install. So we have the belief of we're not an all in one platform. What we do really... really... really well is manage the service side. If somebody is organization. And then we partner with like companies like pro core. They're the best in breed for construction. There are two different ball games to different tracking of information material costing. They're just two different verticals within one. For lack of better words. So, and service trade, if you've got construction projects that are going to... be outstanding more than three months or further, we would say there's better software out there for that. What we're gonna do is handle all of your recurring inspections. As you mentioned, any project or start up that's three months or less and once we get past that three minutes, that... that three month benchmark, we say there's better software designed to handle that aspect of... of somebody has business.

--- Accounting integrations ---

PHONE CALLER #1

7:44 Yeah. And you guys integrate with... which ERP or accounting softwares?

DANIEL

7:52 There's a host, right? We're... we're a modern day platform. So we have the capabilities to really interact with any other modern day platform. But natively, we've got Quickbooks Sage... Sage intacct, Sage, 103 100 Computerease... and there's a few more that are in the works. I believe... CMiC as another accounting construction software, but we see a lot of people merging, somebody of your venture merging almost have like a Sage intacct which to do their construction accounting and then service trade... for... for their service side of the business. But we're not or doors.

PHONE CALLER #1

8:30 No pro court because we... we... we do have quite a bit of tennis construction works, you know, pro core. Also, I guess for us, we'd have to work with you guys and then separately with pro court, which do you... do you know, if they integrate with... with Sage?

DANIEL

8:45 I believe they do. I'll have to get more information around that pro core. Actually, I believe they... they wrote the integration to service trade. Have you looked at pro court all or you just heard of?

PHONE CALLER #1

8:57 No, I, I'm actually not familiar with them?

DANIEL

9:01 Okay. Yeah. And I can give you a list of some of the, you know, top brand or, you know, different construction platforms that my customers use, but I pro course, that kind of that... that name brand, right? That's... that's that first staple of construction software.

PHONE CALLER #1

9:18 Yup. Yup. Okay, great. Should we... should we jump right in to... to the... to the demo?

DANIEL

9:24 Yeah, exactly. Yeah. Let's get hopping into this. And... and my next question before we do that, do you guys have just to kind of understanding like your... your... your game plan, a layout?

--- Accounting integrations ---

DANIEL

9:35 Do you guys have like a time frame on what the evaluation process is gonna look like for you guys? Yeah.

PHONE CALLER #1

9:42 Decision pretty quickly. We... we looked at a few platforms, you know, Sage... Sage intacct obviously on... on the accounting side, but they... they... they would require, you know, someone like you guys or another third party to... to kind of handle the service and... and, you know, project management piece. And then we've looked at Viewpoint spectrum as a kind of all inclusive, you know, all... all in one solution where they... they do, you know, they... they handle the service dispatch, project management and the accounting in general ledger?

DANIEL

10:17 Okay.

PHONE CALLER #1

10:19 What else is looking at BuildOps... as a... as a platform that integrates... with... with... with Sage intacct? And they're you know, I don't know if you're familiar with BuildOps but they're like former service tightened guys... came from the residential side and sound like they're you know, doing some pretty interesting things.

--- Accounting integrations ends ---

PHONE CALLER #1

10:40 And then there's a few others that we looked at but... but not really the... the race day. I could do either, you know, more of an on premises solution, which now what we want or they... they don't have the capability to do like multi location, multi kind have business unit integration. So how, yeah, the, this and the ones where we looked at, but what we're looking at, you know, move forward quickly because we... we, we're... we're growing very fast and... and you're the one that we delay that the more of a... a hurdle it... it becomes take to get everyone onto one accounting ERP system?

DANIEL

11:14 Yeah, for sure. And... and thank you for that. Just good to have that insight. So I know kind of where to go in and how to follow up with you. And if you guys are looking at Viewpoint, we're actually in the process of writing an integration with Viewpoint. We just signed on. I just sign. I actually it at the end of last year, one of their largest customers... they were waiting for Viewpoint to roll out the service module, but they just, they've been dragging their feet for... for quite a few years as far as updated technology and the service side of the business.

--- *Purchase decision* ---

DANIEL

11:42 And again, at the end of this, I can put you in contact some people that do exactly what you guys are doing so that we can hear from the horse's mouth their experience and... and kind of make a sound judgment that way but.

PHONE CALLER #1

11:54 Yup.

DANIEL

11:54 First and foremost, let's hop into this presentation, show you what service trade is to make sure it's a good fit.

--- *Purchase decision ends* ---

DANIEL

11:58 And if you have any questions, feel free to shut them out, right? To make sure you have a good understanding and... and we're a good fit. So... first and foremost, our... our mission statement breaks up into two segments. One, my CEO designed this platform to help companies increase the value of their business.

--- *Customer engagement* ---

DANIEL

12:18 And... and that aligns right with our main mission statement is to help commercial service contractors be more valuable to their customers. So that way you can grow in a scaleable way. And... and what we mean by that is you're gonna see there's gonna be a lot of Amazon like features in the platform that allow you to engage with your customers a way that they're used to engaging with online platforms now. And so that's where we're a little bit different and unique than a lot of platforms is the way that we can engage your customer. And when we see that volume and play, most of our first year customers see about a 23 point four increase... in revenue per service technician, and that's designed around three different areas.

--- *Accounting integrations* ---

DANIEL

12:59 The first is the organization of... of customer data. So everything you see him inside the blue bubble that's the information service trade well managed. So we have some overlap on the accounting side. So again, we don't care what accounting package that you choose will allow you to still track all your revenue and service trade, but then get it over to the accounting system for that final record of truth.

--- ST app contracts and pricing ---

DANIEL

13:20 But what I'll do on return and service trade is we'll take in your customers and their locations, all of your items which would be material labor, and any other fee associated item with a... with a price. And then every one of your customers and the locations has a job contract that has specified markup rules for that customer.

--- Accounting integrations ---

DANIEL

13:39 So that way whenever your invoicing quoting, you need to, do you're just job people in general, all that will live in service trade long before I kick it back to the accounting system. Now, the backbone of how we operate as a service management side. So things like scheduling and dispatching, whether those a service calls coming in or you need to figure out which location and how many pieces of equipment or do for that inspection interval, we track all that very well.

--- Accounting integrations ends ---

DANIEL

14:02 So that way you don't miss out on any opportunity to deliver to the customer. And you can organize your schedule in a way that hopefully gets the guys to a few more jobs throughout the week simply by identifying these jobs and cutting down windshield time. Now, on the technician side, this is where the guys would use a mobile app, fill out the work order.

--- Forms ---

DANIEL

14:22 If there is an inspection sheets that go along with their PMS. They'll have that tasking sheet that would be a favorable PDF. They'd be filling out. They'll be able to take before and after pictures report, recommended repairs in which anytime a technician reports repair operates you while they're on site, a notification gets sent to somebody in your organization or multiple people.

--- Forms ends ---

DANIEL

14:42 You set up notification center based on who needs to Act-On this right away. So again, that way, a lot of times we hear people, they write down the repair on... on a piece of paper or they call the boss while they're on site. Those things get missed and those are all extra ways to generate revenue.

--- *Customer engagement* ---

DANIEL

14:58 So again, we will notify the office through service trading immediately when there's any revenue generating streams available to the company... and then service history, right? So no matter if you're in the office three in the field, you have complete service history of all the equipment, who's been out there in the past, repairs made a recommended. Everybody has all that visibility so they can Act-On information right away. And then on the far right hand side, this is where we're a little bit different. So think about your website where people log on your website. They see the services that you offer. They're attracted to the visual service. Sure allows you to use our platform to engage the customer in the same response. So things like service reports and service history once the job has been completed by one of the field techs. A nice report gets sent to the customer saying here's everything that was done here's, some before and after pictures.

--- *Invoicing* ---

DANIEL

15:49 Would you like to pay your invoice? Now let's click on this link to make it easier for the customer to pay the invoice. So there's lots of different ways to communicate with your customers through service trade. I'm the same way that you would with a website or just driving down the street and they see your Van and the name of your company.

--- *Invoicing ends* ---

DANIEL

16:05 I'm down the road. The only thing that's different is now this information lives in their inbox. So hopefully becomes more sticky where they're calling you from our service, but they're also talking to some of the other vendors in that group saying we use service trade here's. All the information that we get in the format that it comes in. So that's very, my... my CEO is very prominent. I'm wondering your customers, I got an Amazon like feeling anytime they're working with the company. So the second point of... of an increase, the repair and just overall revenue is things like scheduling. So what I mean by that is we will give the dispatcher a board of all the available jobs on a map based on the region that you guys cover as a service company as well as where your tech is currently are.

--- *Tech time tracking* ---

DANIEL

16:48 So that way you can make the most out of every day, right? The goal here, cut down windshield time, drive more billable hours throughout the day and the week simply by cutting down the route for these guys and get into an extra few jobs a

week... last. But not least again, this stuff where, yes, you guys are purchasing it for your own internal tracking and making it easier for your office personnel and your technicians.

--- Deficiencies ---

DANIEL

17:11 But also this platform is going to be a nice additive to your customers. And one of the ways that we do that or we have that approaches the quote process. So again technician finds repair opportunity, the office gets flagged within service trade, your office personnel would generate a quote or proposal that had all the documentation, the pictures that were gathered by that technician.

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

DANIEL

17:33 You're gonna wrap that up, send it to the customer. And now they can actually approve or miscues, me, they can view and approve that quote online. So again, it's like they're an Amazon prime member and your business where they can look at things, hit this approve button. You guys get notification, go out and get that job done.

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

DANIEL

17:50 So again, the easier it is for them, the more likely they are to respond the first time they get this quote rather than waiting for two or three phone calls. And... and that's our business model, right? A customer service platform that was designed for contractors but also designed for your customer. So that is a little bit about how companies use us. Any questions so far?

--- Access to information ---

PHONE CALLER #1

18:13 Hello? No, no, that... that all makes sense.

DANIEL

18:15 So a little bit about who we are and how the platform works. There's going to be two versions of service trade for the office. It's going to be a web based application. You need to have an internet access in the URL to log in. And from the field, text is going to be an app based platform where you can download service trade from an iOS or android device. Right now, we're in the office and this is going to be the log. This would kind of be the main header when anybody from the office logs in the service trade.

--- Access to information ends ---

DANIEL

18:40 Okay, have all of our reporting tools up top of jobs or quotes, invoices, customer information. And then they're gonna be living off the dashboard. For that. First view in that dashboard is going to be a visual of where their technicians are, what job has been scheduled. And then on the right hand side, you're going to have a map that pretty much tells the story of what work's been completed, and what works still needs to be completed. If we go back to the left hand side, you're gonna get two reminders stuff two are overdue jobs. And then the second one would be an appointment reminder to say you have upcoming work in the next two weeks that need to get scheduled out but are not on a technicians calendar.

--- Recurring maintenance ---

DANIEL

19:19 So again, every one of your customer locations page will have the due date in which that service is supposed to be delivered upon. So that way if you're rolling into March, you still have three or four PM is from last month. It'll be the first thing you're dispatcher opens up and sees March versus any overdo jobs from February.

--- Recurring maintenance ends ---

DANIEL

19:39 Same thing with the over with the jobs. Do the next couple of weeks? Just a quick reminder if they miss some jobs on the report and they didn't get them dispatch out to technicians. Let's throw these onto a map and get these scheduled out. First. We've got two weeks to get them done.

--- Tech On-site ---

DANIEL

19:55 The last two buckets are... are more around HR and trying to decrease the amount... the amount of time it's taking you guys to invoice and collect payment, so the... the technician completes a job out in the field, the offices notified you're able to open up, review that work order.

--- Invoicing ---

DANIEL

20:10 And then once the office gets hit the green light, now that work quarter posts as a job that's ready to be invoiced. And this is where depending out which accounting system you have, all this information would migrate into that accounting system. So all the HR information would get put into that GL ledger for that account.

--- Invoicing ends ---

DANIEL

20:27 And then you can continue the on. The invoicing process from there. But again this is just going to be your... you know, your... your main... your main view when

you log in... in the morning... now to help you understand how we manage all the customer data, every one of your customers has a location page.

--- *Recurring maintenance* ---

DANIEL

20:49 Let me just move my little bar here and we have a Bill to ship to model, right? So especially in the commercial industry, you may service 15 locate, but 90 percent of the time that they'll get sent to the Bill to not the actual location you're servicing. So for instance, if you got Butler university, you'll have all the locations that you service under that corporate headquarters. And then once the job has been completed, will take the job from the actual ship to location and tied to the Bill to on the accounting side. So again you're never know, you never worried about a Bill getting sent to the right person. But then with in that location page, this is where you're going to have all the information past present future about this customer. So what we're going to have your services... services is a job that's do whether it's a repair service call that comes in and has never dispatched out. But more importantly, it's going to be the recurring inspections in the PMS that you offer your customer. So this is where per piece of equipment or per building, we would set up our inspection intervals. So now it's more of a set, it forget it, we create the contract interval of service, save that contract. Then every time I run my report service trade to say show me all the jobs that are due in the month of March. These work orders will automatically populate with the description, the inspection report need to get filled out.

--- *Recurring maintenance ends* ---

DANIEL

22:14 And again, you'll never have to automatically update these figures. It's always going to happen at the frequency that you guys determine. Then you have a list of all your jobs scan past president, future. Have they been scheduled? The job type who is out there hasn't been invoiced yet.

--- *Assets* ---

DANIEL

22:31 So again, from the day and start using service trade, you have a record of all the jobs that I've ever been completed. Same thing with your equipment. So this is where we will take each piece of equipment, load it into service. So have make model serial number, location, service, types of belts, filters needed. And this is also where guys will be able to go into the field and click into this piece of equipment. Maybe they're on a service call and they said customers to the gymnasiums, out, the men's locker room is out, they can literally go to the piece of equipment to figure out which areas service by. That equipment and then just look into the history, right? So if they want to start troubleshooting, set a call in the office, they can see when somebody is out there in the past report a repair was that repair ever made? Maybe they put a band-aid on it. But the whole point here is if these guys have the visibility out in the field, they're not calling you guys in the office or calling the service manager, they can act on it right away unless they have a Rich richer question that needs to be answered. But so again, full... full information for all that piece of equipment you guys maintain and the last items down. But hello, our, what we call deficiencies in quotes. So again,

we're... we're a little bit more unique here is anytime a technician reports a deficiency which is a repair opportunity, we create that as its own entity and service trade.

--- *Quoting* ---

DANIEL

23:52 So that way it never goes lost. Its can always be reported on. But you wanna make sure that every pair that comes in the door gets turned into a quote and that quote gets approved and turn into a job. So this is where we'll track will create the quotes and we'll take all those processes in one software and allow you guys have visibility on it from day one... and then last, but not least under contracts, this is where you guys would set up your pricing contracts that have specified markup rules per customer.

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

DANIEL

24:24 Good. Better, best pricing, we're going to attach that contract to the parent company. So that way any time you create an invoice or quote, you'll have the exact pricing for that particular customer and you ever have to worry about again making sure that you're charging the same hourly rate as last time or having to manually go in and do the math yourself.

--- *Assets* ---

DANIEL

24:43 We'll have all those adjustments right on the work order and the quote long before we turn into an invoice. And then any attachments that you'd like to give and make visible to the guys out in the field, maybe it's a... it's a... it's a wiring diagram of building layout of all the parts and the rooftop number in sequential order. You can put all this documentation inside the documentation center. And now that gives the technicians the visibility of any other pertinent information they need to have about this customer in this location. So again, this will be a customer profile that's set up in the way that you'll be able to just pull the records, see the history at any questions or any comments about this particular setup?

--- *Assets ends* ---

PHONE CALLER #1

25:30 No, no, this... this all looks so it's pretty good, looks... pretty... pretty slick.

DANIEL

25:36 Yeah, the... the... the biggest response to get from people is it seems like it's gonna take a lot less clicks to find the piece of information, sweet and heat, right? That's services about speed. So if you can do it in the office in the field, you're... you're in good hands.

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

DANIEL

25:51 So I... I think what we'll do next is just kinda give you a quick rundown on how we schedule the work will go out in the field will complete the job and they come back into the office and hit the final leg of the... of the presentation.

--- *Dispatch* ---

DANIEL

26:03 So whenever your dispatchers or coordinators, so many offices scheduling out the work, we're going to run that report through what we call service opportunities. So this is where I can say since we're at the tail end of February, let's see what jobs we have upcoming for the month of March.

--- *Recurring maintenance* ---

DANIEL

26:21 So you can have multiple offices in here. You can have multiple divisions. You can keep your technicians under one division. It's completely up to you on how you want to keep your jobs and technicians under a cadence. And then when we're looking for jobs, will look for all of your recurring inspections, any service calls, any small projects that came in under the scope and haven't been dispatched out. Or we can run all of them at once. And we'll just say search all the work orders, generate them so we can get them dispatch out to our technicians. So again, this is where you'll see service trade, taking a deep breath. And what we're gonna do is just come to every location, page, look under services and try to find all the jobs that are due. And the month of March.

--- *Assets* ---

DANIEL

27:10 And so what I will get back to you and return are all these generated work quarters. So if I click into a few of these... what the dispatch we'll get on the back end will be the location, any pertinent notes related to this job. And then how many pieces of equipment needs to be inspected during this PM, what's the delivery window?

--- *Recurring maintenance* ---

DANIEL

27:34 Do we have the entire month to get it done? Or is this customer needs to come out the second week of the month, third Tuesday of the month, right? So, good information and we'll get you a good... a good information out. So again location, how many pieces of equipment, and then the delivery window, you can also add in things like what is the estimated price for these jobs?

--- *Dispatch* ---

DANIEL

27:52 How long is it gonna take mission take to get accomplished? So again, when you're setting up their schedule, dispatch will have that know that this is maybe an eight hour job is the only thing that they can get through today. But again, maximizing on their day based on the information that we can pull out. And so what we'll do here is we'll go ahead and classify these as inspections.

DANIEL

28:17 And then we'll create these three jobs. And what happens next is they don't just disappear, but they show up under that map based schedule that I showed you during the presentation... and you can filter these out by, you know, you can get even more creative if you're searching by region or filtering out by technician or service vertical. You can really tailor this map to give you the exact information you need. Everything that you see down here. These are the service lines that my customers offer to their customer base. You guys would only choose what's applicable to your business model per... per branch location. And then I would ask service trade to throw these jobs down to a map for me.

DANIEL

29:00 And then what you'll have next is all the jobs that are ready to be scheduled, dispatched out. So what you're gonna do is what you're seeing here is again it'll be a map of the area that you're a particular company at the time is... is... is... is servicing. And then any job that's in light gray, those are all jobs that need to get scheduled out and dispatch for service. Any pin that has a color code with the calendar mean that's not a technicians calendar. It's a one man job. And then any work or that's boxed off with technicians. That means it's a two man job or three managed job. But what I would do is again, if I want to just don't into... come down the Tennessee area, right? Get your map will be much more zoned into just a service location. But I'm gonna take this work order. I'm going to assign it to a technician, start building Danny's calendar... for Thursday. So again... hover over the icon. There. It's gonna tell me that type of job. It is... the duration, any other pertinent notes. And then I just taking start assigning these jobs to the specified technicians here. And again, the whole goal here is if I can group jobs together and have the any hit these two jobs the same day now and I haven't guys drive by one another. I can maximize more on a... on a map... optimization for the route. More so than just picking and choosing who's available to do what. So that's where our... our map based schedule comes into play. It's really more for that... that... that scheduled work in that side of the business. The other way that we're going to help you schedule and give you visibility of your daily technician view as to the map is skews me through this dashboard. So again, the dispatch board is designed to give you an, yeah, it's a few of what your technicians are doing day to day. And this is also where I would add any service calls that came in. So if somebody from about their health call.

DANIEL

31:10 Contact and location populate in the left hand side of the dispatch board. And then on the right hand side, we can go ahead and generate a service call or whatever. That reason is your customers calling. So I call came in today. It is about 1,215 my time. Let's say no... and the blocker... please go fix. So essentially what you're seeing here is up top would be the reason for why the customer call. Then down below would give the dispatcher the instructions to the technician to say, hey, they called in. Men's. Locker room is out. I just ran a report. It looks like rooftop never one services demands locker room. I need to go out there and fix that. So as those inbound calls come in throughout the day, I log my save them, and then I may go

back to that dashboard to see who's the closest technician to get this job done. I'd take the work quarter. I literally drag and drop it onto the technicians calendar. So this is good if again dispatching those merchant service calls that come in as well as if a guy calls out and you need to move jobs around, you can certainly do that through the dispatch board itself.

--- Quoting ---

DANIEL

32:24 And then every work order, every job and service trade has an audit trail. So if you open up this job, you'll be able to see the history that it was changed from this day to this day, who's the person that changed it? Why it was changed. So they're always be an audit trail and service trade to make sure everybody will have a CY, all right, cover.

--- Quoting ends ---

DANIEL

32:41 Your has some type of deal? Yeah. So this is going to be the way that we schedule out of your service calls, PMS and different variances that you guys would have?

DANIEL

32:56 As you look at this particular process, does this differentiate from any other software? Do you see one being easier than... than not as far as scheduling and... and getting everything lined up? No, I mean this is.

PHONE CALLER #1

33:09 You know, pretty good. I think, you know, compared to some of the other software. I've looked at it's pretty similar. I don't think, you know, software is differentiate themselves that much on... on like service and dispatch it?

DANIEL

33:25 Yeah.

PHONE CALLER #1

33:26 Please, I can tell they kind of more or less. So I'll do the same thing.

--- Dispatch ---

DANIEL

33:29 Yeah. There's no real sex appeal to it. I like the map based scheduled and have that at my previous job, right? I'm a service technician by trade?

PHONE CALLER #1

33:38 Yeah. No, the... the map is nice. I... I think that I've only seen a one other platform.

DANIEL

33:43 Okay. Yeah. So again, it, you're right there's not really too sexy about it but it just designed to just give you the... the visibility and the onset to get these job scheduled out.

--- *Access to information* ---

DANIEL

33:54 So let's do this. Let's move out into the field here. Frank, I'm gonna minimize the screen and go ahead and share... my mobile app with you. So again service trade we are compatible with any android or iOS device... is going to link up my wife I here. And so therefore you would obviously just go to the app store, download our mobile application. And now the guys to start working off of their mobile app for their day to day activities. So service trade mobile app all refresh my calendar, the daily view. And now they'll see all the work orders that are set up in teed up for their given day, right? So we've got a couple of things here. We created that service called. You can see the update. The... the app does update in real time. So this is a service call that we just logged.

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

DANIEL

34:47 But here's, an inspection that I had set up for... for our job today. So if I click into that work order that work where it's gonna have the technician know the location and the job type. Now, before we move any further, depending on how you guys plan on tracking the technicians, we can track onsite time travel, time and even job prep, we gotta go supply house, pick up some parts. But the two most commonly used notifications would be the in route one. I can clock in. But to, if this was like an emergency service call, Frank, here, my point of contact today. I can let you know. My GPS system says I'm right around the corner and I'll see at 1,240.

--- *Customer engagement* ---

DANIEL

35:27 So these will be some of the digital marketing impressions that you'll get via email moving forward throughout the course of presentation, that just kind of allows service trade to speak to your customer, let them know what's happening day in and day out. Now, once my guy, he gets on site is going to say, I'm here, I'm starting my services for today.

--- *Recurring maintenance* ---

DANIEL

35:46 And that brings us to that first window. The... services window... services window is going to provide the technician is scope of work to be performed. So whether it's a PM, a service call, no matter what the job type is, that services window

tells the technician why we're here and what we need to accomplish... now as it relates to things like inspections.

--- Forms ---

DANIEL

36:06 Typically, my contractors are having guys fill out an inspection form or checklist along with the work order. So what we will do and return is under the view, more details button I will take. Any of your current paperwork inspection forms, turn them into a fill ubl PDF.

--- Assets ---

DANIEL

36:22 So that way the guys cannot only just felt the work order but also... felt the inspection form as well. So when you create these rules and regulations will happen is you'll take these forums, attach them to either customer location or a specific piece equipment like a rooftop unit.

--- Forms ---

DANIEL

36:40 So that way when the guys go to pull up the paperwork, they're not sitting through every type of inspection form that you guys have only the one that's applicable to this job type. And so when I generate that paperwork, now be able to fill this out as a... syllable PDF form. And depending on how many pieces of equipment working on that's how many forms get generated. Now, the other thing with that is that we will also do the pre-fill information for the technicians. Meaning since service trade knows what piece of equipment they're working on, knows what job and work order number it's attached to which technician is out there are technicians are out there, all that information gets prefilled. You set that up, you determine what you want pre-fill during implementation. So now the guys are just responsible for going through and checking off their list of what they've done. And then once we get done filling out our checklist, we go ahead and just add that right to the job itself.

--- Deficiencies ---

DANIEL

37:41 Okay. So that's going to be the way that you're gonna phone inspection reports within service trade. Some of the other windows here, things like attachments... attachments allow the technicians to tell the story on what's happening day in and day out. So instead of writing everything down there on a service call or they find an issue during that PM, they go ahead and take a picture, take a video of take an audio memo... to let the office in the customer know what they found and what they're working on. So we'll take a couple of before and after pictures.

DANIEL

38:16 But again, this just allows the technicians to easily just identify the store through pitchers more so than words, so that you can add these things on the invoice

or the quote and then more likely to get approved or paid on the first... the first visual.

--- Deficiencies ends ---

DANIEL

38:29 And then I always like to throw this in for a plug for the technicians at the end of the job, right? The other thing that we hate most get him the Van running down what we didn't giving you the recap. So now, before I even close out of the job, going to let you know everything that was done, the material that was used, any repairs that were found, just give you an overall idea of how today's job went.

--- Parts management (purchase orders) ---

DANIEL

38:46 And if anything needs to have moving forward... save... the other few boxes. I wondering new review or a job items. So job items allow the technician. One, if we're on a PM, what equipments needed? What belt is, do I need to get ready for fill up my they in the morning?

--- Quote templates ---

DANIEL

39:05 So they'll have a preset list based on the contract that was signed with you in the, of what equipments needed for this particular PM. And then we can also allow them to add parts and time that was spent on any job, whether it's a PM, a service call.

--- Parts management (inventory) ---

DANIEL

39:20 We'll take your items into service trade from your accounting system, wherever they live. Now upload them into the platform. So that way they guys can either scroll through their list or just start to type in the parts that were used. So I use the widget for today. Here's.

--- Assets ---

DANIEL

39:33 My widget, I've used to have them add that to the job. I can do that for parts labor, or any fees that are associated for this given job. The next window would be the asset page. So this is where guys can get a brief description of whatever is happened at this particular piece of equipment we're working on.

--- Deficiencies ---

DANIEL

39:54 So if I click into that unit, I'll be able to see full service history. Any repairs at river found, I can even click into that ported repair opportunity to see what the technician previously founder and that inspection, what their recommendation is. So again, all that history will live in here for those guys to review, report on and have the type of their fingers. And then last but not least are deficiency loop. This is where anytime a technician finds additional services that needs to be rendered that need to get quoted out, they're going to report that in the mobile app. And then the office gets an immediate notification. So let's just say during today's inspection, I found that roof top number one had a bad compressor and it needs to be replaced. I'm going to force the guys to fill out these six steps. The next one again add the picture of that compressor so that you can add that in the quote and show the customer.

DANIEL

41:03 And then I'm going to let someone in the office know exactly what needs to happen for this quote.

--- Assets ---

DANIEL

41:06 So again, I'm rooftop number one, we've got a bad compressor. This is the make model and serial number. I'm going to need an extra set of hands for the first two hours and then I can wrap it up my own. I would quote this job out for probably four hours... and I'll give you the rest of information on this report... save that audio metal.

--- Deficiencies ---

DANIEL

41:27 And now it's pretty easy for the guys to continue on wording. We let you know this piece of equipment not functioning. We need to get a quote out right away. Which equipment are you working on? Danny? I'm working on rooftop number two. This is a brand new opportunity that I found. So I'm gonna go ahead and establish that as a new repair. And then my proposed solution is to replace compressor. And I'm gonna hit save the may I hit save and alert goes out to one person or multiple people in the organization that need to get an instant visual.

--- Access to information ---

DANIEL

42:04 This. So that way you can generate a proposal and get that out to your customer as soon as possible. So that is going to be the cadence in which technicians use the mobile app. Any questions on... on any features or functions I didn't cover that you guys are hoping to see or things that maybe you like?

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

PHONE CALLER #1

42:22 Yeah, or the, of the invoices that go out to... to the customers, can they be customized? Like by, you know, each company like, you know, six different

companies, they... they can customize how the invoice loads in the information on there, the logo and all that?

DANIEL

42:40 Yes. Yes. So like for your different, we call us managing brands. So yeah, each one of your locations would be customized to have their company had, or their terms and conditions, their layout, as far as how do they show the pricing that will all be done? Now, sure that in the office side of things, but yes, absolutely. Got it.

--- Tech On-site ---

DANIEL

42:59 And if you ever need to get customer signatures, just know that's something that service trade can provide. I know a little bit off topic with COVID, but we do have what we call the create work acknowledgement which is just allows the technician to generate a report and have the customer sign off on that report. That's something that you guys have talked about or something you guys do now... kind of choppy water.

PHONE CALLER #1

43:25 Yeah, I mean, it depends on the companies. Some of them do some do.

DANIEL

43:29 Okay. Well, just know that's always an option if you need to... to put that in emotion. And the next step is for the guys to clock out. So I'm done with today's. Job. They've completed all my services for today. And yes, I'm done with this visit. It's ready to be invoiced. So that's your mobile application. And then back in the office, this should be the work order that you guys would review before sending out that final invoice. So again, the platform does up update in real time. So some of the office been notified that this workload is ready to be reviewed. We can see that the services were completed. We can see if there were any parts added to the job, any labor material. And then the attachments. So the inspection reports, the before and after pictures and a recap of how that job went today.

--- Deficiencies ---

DANIEL

44:22 And then what's going to happen. Two things are gonna happen. One that deficiencies detail report lives on the work order itself to it's sent through a notification to whoever needs to get an instant visual, this report, generate a quote. And then three, you'll be able to search for any deficiencies that were found throughout the day throughout the week.

--- ST app contracts and pricing ---

DANIEL

44:40 So that you never miss out on these additional services to be quoted out. But what happens next is say we're happy with all this workflow. The information is

correct. I've got all the right attachments. I'm gonna say, great, let's complete this job... and generate the invoice. So every one of your companies, your brands will have their own pricing structure which will automatically apply to the invoice or quote.

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

DANIEL

_{45:09} And then when it comes to customization, again, each one of those companies would have their own logo within that... that... that header of the invoice itself... depending on how they want to share their pricing, right? So you can dictate the different levels of detail that you want to put on the invoice.

--- Quote templates ---

DANIEL

_{45:26} So maybe just a grand total, only time material, line items with or without prices completely up to you on how you want to customize that invoice. You can add specific job notes, right? And let the company know the job type, who is out there on the services that we're offering.

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

DANIEL

_{45:48} You can always edit or make any modifications as needed. And then a new feature that we just rolled out here. Frank, is what we call the invoice link. And what this is gonna allow your customers to do is pay invoices online. So again, whatever company is sending out that quote, it's going to have their company logo on the top. Left hand corner. And then depending on how you want to customize the visual of the quote, everything from this high lighted line down is customizable within the parameters and details of the information gathered in service trade. Now, two things here, maybe this customer has no idea what the invoices for. They're gonna wanna click on the service details page and that's going to let them know who is out there, why that technician was there. You'll be able to share files like the inspection report, the pictures, maybe the audio memos for the office. So we'll keep that toggled off. And then them alert to the fact that you've found a bad compressive during today's inspection. So again, once they get that quote, they'll know exactly what that's for and they'll say as always, we appreciate your business. Let's get that page. Now your customers can come online and pay with either a po, credit card, AC H information, and... you guys would just be required to have a merchant account which would as, you know, talk about financing.

--- Invoicing ---

DANIEL

_{47:11} I would be your... your placeholder for the money is that were collected. So this is how if you chose to use service trade as your invoice tool. Great. Go ahead and invoice out your customer with the same respect, whether your invoicing out of service trade or out of an accounting system, that same information is gonna roll

over on the integration into that ledger account depending on which accounting system you're using.

--- *Deficiencies* ---

DANIEL

47:39 The last piece I want to review with you before I open the floor is the quoting process. So again... wherever your offices response for getting these quotes out would get a notification that says, let's click on this report to see what's happening over at Butler health. So that's gonna open up into a deficiencies details page to give me the location, the equipment, and a brief description of the problem service trade. It's also gonna let you know anytime you been out there in the past to work on this piece of equipment. And then any attachments that we gather, say quote out efficiently. So after I listen that audio on... on what needs to get quoted out and say, great, let's go ahead and generate your proposal for this repair opportunity.

--- *Quote templates* ---

DANIEL

48:22 And so that brings us to the quote page itself is going to be a template that you're gonna work off of. The first thing that we would recommend you guys doing if you... if you move forward service trade or... or creating quote templates. So all your common quotes whether it's a sales survey, repair opportunity, generate 1,000 service trade. So that way compress replacement is pretty common. Now I can have my description, my t's and c's the typical line items need to make that repair all pre-populated onto the quotes. Now you can just make some minor modifications. So description probably isn't going to change too frequently. But what will change are the line items for the quote price itself. So this is where you can come in and say, Danny said it was going to be a five hour long job and he needs to help her for two hours. We'll keep that. The same. Everything else looks good. The only thing we need to do is go ahead and price out that special compressor we have to order. So you can now add one off parts in here.

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

DANIEL

49:28 Or H VC group, go ahead and modify your pricing. You guys paid 1,800 for. We're gonna charge 24. But what you're gonna see here is every one of those customers has a contract assigned to them. So that way if you have different labor rates for certain customers, you can always override the standard contract for that customer. Maybe you want to give them a break and give him a 10 percent discount because they've been a customer for the last five or 10 years. But again, it will always default to that normal price range with the upticks in the margins. And then just like the invoice, how do you want to send out the quote?

--- *Quote templates* ---

DANIEL

50:04 Typically with a repair quotes? We'll just do grand total only, but we'll leave that up to the person doing the quotes. We save that. So now I can see what my cost is,

cost the customer, my gross margins. And now I just send this over to Frank for his approval.

--- *Deficiencies* ---

DANIEL

50:23 So, Frank, your primary contact for quotes on this location, the audio memo, I'm gonna turn off, that was more for the office, but I certainly want to share that picture of the quote on the quote. Excuse me with the customer. And now within 10, 15 seconds, you'll get a quote here in your mailbox, Frank.

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

DANIEL

50:41 And when you are, when you open up that quote, this is where again, that company that's sending out the quote, there logo would be in the top left hand corner as well as their terms and conditions will be in the bottom. So that way your customer be able to read the scope of work, see those pictures that were attached on why you guys are recommending that repair. And then they can actually approve that quote right online, entering their information, check the box that they've read over the terms and conditions. And once they hit approved for a second time, that's a legally binding contract and all 50 states.

DANIEL

51:22 So that is our quoting process start to finish.

--- *Quoting* ---

DANIEL

51:25 And the time a guy finds a repair opportunity all the way up in the time that the, some of your offices is generating that quote. Now that quote make it to your inbox. Frank, yup. Awesome. If you wouldn't mind just hitting that... that email and hit view and respond that way, you can see exactly how your customers would interact with that.

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

DANIEL

51:51 I'll get notification and then you'll be able to kinda just see exactly how that becomes more of a tangible quote more so than customer just opening up and having to call print sign scan. If they can click approve, they're more likely to... to approve it in the first... first go around.

--- *Quoting* ---

PHONE CALLER #1

52:08 Got it. Great. Yeah, this looks.

DANIEL

52:11 It's nice, awesome. And again, depending on which companies sending that quote out, it would be their header, their terms and conditions on the bottom... yep. And then we'll always track that stuff for you to, right? So I can let you know service trade is going to let the service manager or the salesperson know when that quote was opened by their customer, track the IP address as soon as that customer approves the quote, this boat get turned information submitted to an approved quote.

--- *Deficiencies* ---

DANIEL

52:42 And now we can take this quote itself and turn it into a job with all the detailed information that as part of this quarter itself. And then last, but not least we do really well reporting and I'll just use the quoting as an example. Any that you ever need to report on.

--- *Quoting* ---

DANIEL

53:00 And service trade is all viable from up top here on a reporting tools. But for the quotes, for example, let's just say you want to see all the outstanding quotes that you sent out, but they weren't looked at by the customer. I'll give you a report that says you've got 25 outstanding quotes this month that have not been approved. Let's get them sent back to the customer and then give them a call... right? Same thing with if for some reason those quotes get approved and they get missed by one of the sales managers, right? You can run a report and say, show me all the quotes, customers approved.

--- *Customer engagement* ---

DANIEL

53:35 Let's run this report, turn them jobs. So really anything that you ever need to report on service trade from a customer base will all be available to you through the reporting tools on top?

DANIEL

53:52 So that Frank is... is a as a quick 50,000 view of service trade?

--- *Purchase decision* ---

DANIEL

53:59 Any kind of like to open up the floor to you to see if you have any questions. Any feedback? If you think this is a good fit and... and just kinda give you the Mike, yeah, no, no.

PHONE CALLER #1

54:08 Good question. And this is... this is super helpful. And... and, you know, clearly this is a very well thought out kind of platform.

--- Type of work ---

PHONE CALLER #1

54:16 I think the question for us is just going to be what, whether we want to, you know, I think most of our business still comes from the construction site. Okay? Any service, you know, repair, maintenance that counts for maybe 15 percent of our revenue? So the question is going to be, you know, who... who do we want to work with on the construction side? And do... do we want, you know, separate platform for... for the service piece and the project management piece?

DANIEL

54:45 Yeah. And that's totally get that. And again, we'll always be up front with you and we will say we will not be that fit for that construction side of the business, right? We definitely recommend saying software out there that handles that very well. But what that softwares weakness is going to be a service to different entities.

PHONE CALLER #1

55:03 Yeah.

DANIEL

55:04 Well, cat, we just want to do what we do well, and that's working with commercial service, mechanical contractors that's... that's our verticals.

--- Type of work ends ---

DANIEL

55:11 So we're not a catch. All, I think as you can see here, all the verbiage and layout was designed for two companies, fire life, safety and mechanical contractors that's the only... only companies that we work with. We take under our.

PHONE CALLER #1

55:24 Yeah, makes sense. Okay. Great. Well, Daniel, this super helpful. Appreciate you... you taking the time again. Yeah, let... let me circle back with the rest of the team and... and, you know, we're... we're still kind of evaluating a few different platforms and we have like one or two more demos event. So I'll... I'll keep you posted.

DANIEL

55:45 Okay. Yeah. What I'll do is I'll send you a recap email that has this recording. I'll send over some of our integrated partners information that we can see integrated accounting software. And then if I don't hear back from you, I'll check in with you in about a week to see how the presentations are going, see if there's any information you need from me. I just try to keep things upfront and transparent and I appreciate

if you guys do the same thing that way on that, bogging you down all the phone calls. So, yeah, there's a, we give you enough time just to do a five minute check in.

PHONE CALLER #1

56:15 Yeah, sure.

DANIEL

56:16 Perfect. So I'll put that on my calendar here, Frank, give you a call a week from today, and then if any questions pop up since our presentation before I check in my email, we'll have all my follow up information. We can go from there.

PHONE CALLER #1

56:28 Perfect. Sounds good.

DANIEL

56:29 Alright. Well, hey, thank you so much. And like I said, if you haven't looked at pro court, take a look at them for the construction side of the business where it, alright?

PHONE CALLER #1

56:38 Much. Alright. Take care.

The End