GONG

ServiceTrade Demo with Western Allied Corporation

Lauren Rice with Western Allied Corporation
Recorded on 9/21/21 via Zoom, 1 hour 52 min.

Participants

SERVICETRADE

Lauren Rice
Director of Enterprise Sales

Clint Mathis
Field Manager

Ben Bilhorn
SDR

WESTERN ALLIED CORPORATION

Katie Rund
Office Service Manager

OTHER

Todd Buchanan

Topics

Transcript

KATIE

0:03 Hello? Hello?

CLINT

0:05 Hey, Todd. Hey.

KATIE

0:06 Katie. How's it going?

CLINT

0:09 How's it going?

KATIE

0:10 Good. How are you guys doing? Sorry about that guys in this office before I shut the computer down. So we came in expect it to be honest. It wasn't...

CLINT

0:18 No worries.

CLINT

0:23 Good. We'll have my name's Clint just so you know, I haven't met you. I know that you spoke to ban earlier, but I'm the territory manager here in California for service trade. And also, we have Lauren who's the director of sales out here on the west. So I appreciate you joining both of us.

KATIE

0:42 I think what do you guys actually worked with our northern California division also, right? Or both of you maybe?

LAUREN

0:48 That's me?

KATIE

0:51 Yeah, they said that you guys are really good. So I'm excited to see what you have to offer.

CLINT

0:55 Nice. Nice. So, yeah, just a little bit of how the call wants to go. Like I said, I'm Clint Mathis, the California territory manager. I'm new here. It says service trade for the territory manager position. So, I've been in the industry for, I don't know about three and a half years or so and made the move over to service trade. Lauren has been with the company, I guess about six years now. So, very excited to... to chat with you guys. Like you said, we work with a sister company of yours up and, nor... nor Cal.

--- Paper process ---

CLINT

1:27 So we're excited to show you guys as well. Been sent over some notes just to kinda go over a little bit. That way we're on the same page. I kinda get a feel of your pains and... and what you're kind of going through, you mentioned that you guys were just using carbon paper copies now to send out work orders. Is that correct?

--- Paper process ends ---

KATIE

1:46 Yeah, we... we order them from the dinosaurs this.

CLINT

1:50 I didn't know they still make those, but that's good that you still have some.

KATIE

1:54 Good. Last Wednesday.

CLINT

1:55 Well, you got this can be a collectors item, Matthew join... join with us so that'll be a good thing to hold onto.

--- Paper process ---

CLINT

2:02 So, yeah, just walk them through that process. He said that you guys were tied in with spectrum just like the north Clint office. Is that correct?

KATIE

2:10 Correct.

CLINT

2:10 Gotcha. And then one of the big problems that I got out of it is you guys are having issues also with like the deficiencies or, you know, repair service that are trying to get that information from the texts to the area managers. Is that correct?

KATIE

2:25 Yeah, just trying to streamline and it takes way too long. And then half the time it's off of text messages or something that gets government between, and then it ends up being incorrect, but time it lands on our last.

CLINT

2:36 So, every everything's a text message from that technician all the way to the area manager before they can get a quote out.

KATIE

2:42 That's not the way it's supposed to be, but that's the way it's kind have gone for a lack of structure. I should say.

CLINT

2:48 Gotcha. Well, I think you'll be pleasantly happy that's... that's one of the better things we do here at service trade is being able to... to pull this... this pull through work through from the technicians, being able to get that efficiency out late, it right in front of your guys, his lap.

--- *Paper process ends* ---

CLINT

3:01 And you're able to turnaround a quote very quickly. So I think that you'll be... be happy with that. Anything else go ahead.

LAUREN

3:09 It's helped me understand timing, Katie, what your roles are at the company. So we kinda know what's under your purview?

KATIE

3:18 Katie is our office manager for the service side of things. And to be honest, she's going to be the one that kinda dives heading. So, this whole process, she came from a, another company that was already utilizing another platform and I'm the area, the service manager here. And I know little to nothing about this... this type of software other than what we've been pitched by the number of guys in our office. So she's got more understanding of what she would like to see because she's also the one who helped integrated with spectrum. And then I've got obviously my expectations from the field.

--- *Purchase decision* ---

KATIE

3:56 So I don't know, I wanna see the integrated with the other territory managers to roll it all out and try and make it as seamless as possible.

KATIE

4:08 Good.

CLINT

4:08 To go? Okay? Was there anything else that I didn't hear that I know you mentioned about expectations? Was there anything that... that I didn't hit as far as bands notes that... that you were expecting or you're needing from your standpoint, I guess I'll start with Todd first?

KATIE

4:23 No, I mean, I know I kinda had some... some big conversation was about what we've got now and I kind of understand and talking with Jeremy and some of the guys are both what you guys are doing there.

--- *Accounting integrations* ---

KATIE

4:33 So I think what they have already lined out is going to be pretty similar to what we're looking for the beginning with the integration with spectrum because I know from our accounting side, we share the same accounting for our construction and controls and everybody else. So we kind of had some limitations there with other software on how we can migrate, but I think they've already work some of those bugs out.

--- *Accounting integrations ends* ---

KATIE

4:56 So I think... I think we're... we're good to go this to figure out what you offer, how to make it work.

CLINT

5:02 Perfect. Well, just to give you kind of the lay of the land of what's gonna happen here. I'm gonna give you a little background of service trade.

--- *Customer engagement* ---

CLINT

5:07 That way you guys are a little bit for more familiar of why we do what we do to... to help companies. Also, I'm going to give you a high level view of the tool, run you through, you know, a work order which we call jobs and service churn, you know, give you that back office view, take you into what a technician would see, how they can manage those work orders, types of things, run you through some of the quoting stuff.

--- *Purchase decision* ---

CLINT

5:31 And then if we need to answer any questions just to make sure that this is, you know, what your... your liking and seeing. And then we can go into that more of those answer quick questions as far as, you know, integrations, things of that sort. Is that fair enough?

--- Purchase decision ends ---

KATIE

5:43 Sure.

CLINT

5:44 Hi, I'm gonna share my screen here. Pull this up.

CLINT

5:56 Right. Can you guys see my screen? Okay? With a little... H facts system up top? Okay. Well, yeah, service trade. We've I know that you're a bit familiar with them like we've already spoken about, but you can see obviously with... with your logo up here, you know, a lot of these companies that are going to be familiar to you in this area, you know, really trust us, you know, to really help their business grow in... in what the... the Foundation of service training was really built on was a customer service application.

--- Customer engagement ---

CLINT

6:30 I know there's a lot of different other products out there that can do this and feature... feature you to death and things of that sort. But our goal is really, you know, to help you bring more value to yourself to your customers and also help you grow in that business and how we really do this and be able to, you know, value is everybody's always used to the whole truck wraps and that type of thing and that type of marketing. But now we're an online world. Nowadays, everybody's doing everything online. So we do what's called a digital route and how we help you grow. It's really three main areas. The first is, hey, we want to help you operate efficiently. I mean, you've already even set it Todd the... the first things you want... you want... you want to be able to work more efficient.

--- Customer engagement ends ---

CLINT

7:11 And we want you to help you to get the most out of what you already got and that's whether you know, creating more jobs for your technicians, them being able to turn more jobs maybe with the software and also, you know, being able to... to value yourself more and be able to, you know, make more money, you know, per technician... next week, we could try to help you keep your customers and attract more prospects.

--- Customer engagement ---

CLINT

7:35 I like to use the example of Amazon. You know, you'd be the Amazon in your industry, not only just be in the easiest company to work with, but also have that online presence, being able to say, hey, you're going to be able to get this information at any time that you want based off of certain, you know, portals and things that service trade has. We're going to be able to offer you the best business. And on top of this, be able to... to add a premium to... to your guys as cost. And how we can do that. Thirdly is through these deficiencies or repair work that we... we spoke about. We want to be able to make it as simple and easy for your technicians to go off their report that deficiency, be able to get that to the back office, whoever it may be and be able to turn that quote around because the more quotes you get off there, the more work that you can have possibly an out there and be an approved. So your... your customers would be able to do this. It simple approval with one click of a button which we're going to walkthrough that as well. All in all, our goal is... is to let you be able to turn your search service business into a customer service business. It's not that we're a work order management tool, that type of thing. Yes, we can have all the bells and whistles, but we're here to work and partner with you to... to turn that your... your business into a customer service business. How does it work? We're going to walkthrough that want to see based off of that, if you... you got any questions of anything that I touched on or anything like that, any comments?

--- Customer engagement ends ---

KATIE

9:02 No, it sounds like everything's done 100 percent through service trade. There's... there's really nothing external that we need to do.

CLINT

9:09 Yeah, yeah. It depends on your processes, but based off the notes and... and talking with you now, yes, you can come in. This would be your one stop shop to be able to run all this through.

--- Recurring maintenance ---

CLINT

9:19 And we're going to take you from start to finish from that work order which will get into now and show you how that can be finished off as well. Okay? So what we're looking at now is a location. And the reason I bring this location up is because I know that a third of your guys, his businesses doing preventative maintenance work. And one of the main thing I really want to touch on this high level demo here is the services. So what we can do here is we can build these services out. If you're constantly doing some, you see exactly, you know, when these things or do you can do one time services? You can do these preventative maintenance, whether it's quarterly monthly. We can go in here and look at these services and be able to go and add a job to many of these services. What I actually want to do is show how we can create one of these new services. I know you guys are doing.

--- Recurring maintenance ends ---

LAUREN

For Clint before you do that, I think it's important to note that this is the office you have service trade. So this is what the admin team would see. And this is essentially like this customers file this LMS systems in San Diego.

CLINT

10:23 Exactly. Thank you. Thank you, Lauren. And also within the services, I know that I got kind of adjust of, you know, you guys are sending out monthly packets. Can you kind of walk me through that a little bit? K?

KATIE

10:35 Yeah. The maintenance invoices, everything generates just at the first of the month. So all of their ticket and that's what we run on the, you did a three part forums and then get that package.

--- *Paper process* ---

KATIE

10:50 It's every month. So, however many maintenance is that technician has those, the tickets that he gets the beginning of the month and then invoices, your German.

CLINT

11:00 Yeah. And how long is that taking you to process all those?

KATIE

11:03 To, to sit there and hold each paper at least an hour?

CLINT

11:08 My goodness must be quite a headache for you. Well, hopefully we can show you a little easier way and then, you know, be able to be a little bit more organized from those technicians because I'm sure that with all that paperwork that sometimes something might get lost or I mean at the end of the day, if they're... if they're scheduling those out themselves, maybe you don't even know if they get done at certain times.

--- *Quote templates* ---

CLINT

11:29 So what I'd like to do is go based off of these services. If I come over here with these action buttons over here, and I wanted to add a new service. What's really nice and clean and easy to be able to do this is we also have what's called service templates so you can build these service templates out. They won't be stored. That was all those services that I showed you. So if I simply go in here to use it, hi, I'm plate and let's just say we're gonna do have a maintenance... pulls up all my maintenance service templates and what this H vac, preventative maintenance.

--- *Assets* ---

CLINT

12:01 Another great thing that we're going to do in here is keep up with all of your assets. So as we go now, we can say, hey, you know what? We know, this particular asset is going to be this cooling tower.

--- Quote templates ---

CLINT

12:11 Let's apply that asset to it. Any contracts it's gonna have all the descriptions. And now we can also put preferred technicians and I want to show you this as we move forward. I'm just gonna put myself so when you go to schedule these out and have kind of that same process that you're using you're.

--- Quote templates ends ---

CLINT

12:26 Still going to be able to do that, but it's going to be a lot quicker, lot cleaner and it's all going to be digital. Any questions so far?

KATIE

12:35 So this is for like your service contracts, is that you, this is, what are your version?

LAUREN

12:42 That was... that's right?

--- Recurring maintenance ---

LAUREN

12:46 What... what Clint is showing you is how to set up like let's say this is a new customer that you've just sold a maintenance agreement too. And we know where we need to maintain this cooling tower every three months. So he's creating that one time. And then every third months, when you pull the report, like you're doing now to show, hey, what's due this month, it'll automatically pull up this information, the correct pricing, the correct technicians, the correct items, and then you can bulk create those work quarters and assign them to the technicians. Okay?

CLINT

13:24 Exactly. So we go here, we can say as the whole month we have it start in September, all of the equipment that's associated with this particular services already put in here, we can always edit that later. No worries. And now I just simply save that. So that would be in those types of services. But as Lauren mentioned, if I go into my service opportunities which I have pulled up right here, now, I can run this report just like she mentioned. So I'm gonna run it for this month. I know this isn't my equipments office and just simply hit search here.

CLINT

14:05 Start over equipments office.

CLINT

14:13 Yeah. You can see. This is that one that I just added this L a fit to San Diego. And so as Lauren mentioned, we can do these on an individual basis and it pulls this up here or I could bulk all things. So just imagine if you're going to do those monthly for each technician, you could do it by preferred tech, pull up all their and do one bulk entry if you want to go ahead and schedule these.

--- Recurring maintenance ends ---

CLINT

14:34 And what this is gonna do is I can go here and let's just say preventative maintenance. Once that goes in and create that one job. Now, what this is gonna do is schedule it for that prefer tech which are.

LAUREN

14:45 Wow. It won't schedule it.

CLINT

14:48 Excuse me. But when I schedule it, will put that on there unscheduled list and leave it in there unscheduled tab. Thank you for stopping me there, Lauren.

LAUREN

14:58 That's okay. We look.

CLINT

14:59 At the time.

LAUREN

15:00 Made that... that designation is because I understand that your technicians are being assigned those work orders and they... they self schedule. Is that... is that correct? Yeah. So what Clint will show you is an example of an unscheduled maintenance and how the technicians can view that. And he'll also show you this example of a scheduled maintenance that... that he has for today as well.

--- Assets ---

KATIE

15:28 So, before we go onto that though, just, this is a stupid question. Forgive me from, I'm have a lot of these were... wanting division. But when you're sending one of these up, if I've got an account that Scott say 25 pieces of equipment on it, all of those pieces of equipment are under this one customer.

--- Recurring maintenance ---

KATIE

15:45 Is there a specific tasking that you line up for each individual piece of equipment or is it a bulk just list of all of them? Or how does that setup for the guy to get somebody else to do everything on this list this quarter or this month? I should say.

LAUREN

16:00 It's a good question. So, I think this work order here's a good example. It's not as large as an example as you just gave, but... but these... these jobs that are scheduled and service trade can have multiple services assigned to them. So we've got the ease throughs 500 time unit. And then a cooling tower as well that are doing the same month, based on your unique business rules, you can create different maintenance checklists that are specific to certain, like types of equipment or certain customers. And based on how you set up your account, which is something we help you with the correct maintenance tasking, will show up when... when the technicians are out in the field based on what services they're... they're perform.

KATIE

16:49 From month to month, quarter to quarter because I might have an annual is on specific pieces of equipment, but other stuff certainly seen quarterly type of thing.

LAUREN

16:57 Yeah. So some of the, some of the things that can kind of trigger different paperwork to show up as like a different type of unit. So you'd have different passing for packaging than you would for a cooling tower or if... if you for L, a fitness, maybe they have a different casting lists and walmart, so you can... you can kinda define what form show up based on your unique business rules.

KATIE

17:21 Okay. But then for like say, for instance, I cooling tower, I might have three operational inspections throughout the year, and then one annual inspection for that one year.

--- *Pricing* ---

KATIE

17:32 I mean, I'm one month that I have the annual inspection for the year. It will show the technician that this month, this annual.

LAUREN

17:38 Correct.

KATIE

17:39 Okay. Got it. Okay.

CLINT

17:44 Great question. You said dumb question. And I didn't... didn't think it was very good question.

KATIE

17:49 Well, I got... I got plenty more. So, Margie done one before.

--- Quote templates ---

CLINT

17:53 Perfect. So this also like she mentioned will add, you know, since I did use these particular services that we already had when I created this and scheduled it, it's going to give the proper, you know, labor parts, that type of thing, the items there. And then you'd be able to see any else that's associated deficiencies which we're going to get into now.

--- Quote templates ends ---

CLINT

18:14 So before I move, is there any more questions before I move into the... the technician view? And I'll show you the unscheduled as well?

KATIE

18:22 And you had mentioned earlier that you do maintenance, the maintenance, this one section of it. And then he said he didn't work quarters? Can you run work orders and jobs in this software? I always get only or borders?

--- ST app contracts and pricing ---

LAUREN

18:37 So since people define those things differently, can you explain what four quarters and jobs mean to you?

KATIE

18:42 Hello, our work quarters? Like... hey, we've got a service call. We're going to know do this. There's nothing quota and nothing formal jobs for us. Usually a fixed price. We have the occasional TM job, but jobs are we quoted something?

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

KATIE

19:00 It's fixed price? It could have multiple trades on it, not just service techs. So it's a little bit bigger than just our one guy going to this one call to fix this one problem.

LAUREN

19:13 Yeah. Okay. So totally get what you're saying. So in service trade, the word job represents, it's sort of an all encompassing work for like a service ticket or work order or whatever you wanna call it a car, but it's a digital carbon copy form.

--- Recurring maintenance ---

LAUREN

19:30 And this can be for maintenance is where you kinda know what you're doing. It's fixed price or it could be for service calls where you just, it's Tyana. So it really just depends on, you can kind of differentiate them by, instead of having a preventive maintenance job that you see at the top left. And this job here where it says preventive maintenance, it might say service call instead. So you can certainly do both. So service trade. Does that answer your question Katie?

KATIE

20:01 Can we differ do on these different types of jobs? Can you differentiate like the job numbers because that's kind of how we like a fixed price jobs with us, starts with the nine and have service call or a quarter starts with a six. So is that something that we can differentiate in the system or is it all automatically generated?

--- Recurring maintenance ends ---

LAUREN

20:28 Can I answer your question and the question, sure, why... why do you do it that way?

KATIE

20:36 Part of it? It's just always thinking just always. Okay. So the last 16 years has been demo. Yeah.

LAUREN

20:45 Got it. Well. Okay. So, to answer your question, no, you can't define the job numbers in service trade.

--- Recurring maintenance ---

LAUREN

20:55 They're all globally unique, means you won't have the same job number twice. But people are able to distinguish between those different types of... of jobs by... by setting that type of job when they create it. So either preventive maintenance or service call, or emergency service, or installation, or retro fit like there's all kinds of options and then you can run reports based on that.

--- Access to information ---

KATIE

21:20 All the time, not necessarily, but on the.

LAUREN

21:24 Correct.

KATIE

21:25 Okay.

LAUREN

21:28 Great question.

CLINT

21:33 Now you can see on my screen, this is the technician view I'm on my iPad. So you can use, you know, either... either device... when you guys look to... to go into this, but I want to show you up top where you can see scheduled unscheduled and completed.

--- *Access to information ends* ---

CLINT

21:50 So those two that we want me to have them. But the one that we made together, you can see here that they are unscheduled and thank you, Lauren for correcting me earlier, but they have been assigned to these technicians and you could go through and they could easily come on here, go into this job and then go and complete the work that needs to be. But the one that I just showed you is going to be this one that I want to go into that was schedule and right away you'll see eight titles which we're going to go over but at the bottom and this is going to be part of that customer service. I know that... that was in the notes as well that you really happy that you're technician does have the... the great relationships that we have, but we also gotta do that as a company as well. You know, not to say that those technicians are going to leave soon, but if they ever do, we still want those same customers to stay with the company and not go with the technicians.

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

CLINT

22:39 So as we continue to... to make this a customer service, you can see that we do clock events. So this is a in route. So if I open this up and let's just say I wanted to clock in and let me know or clocking out. But I can also notify my customer from a technician standpoint.

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

CLINT

22:54 So I can say, hey, I'm gonna end up getting there at two o'clock at two o'clock I can go and pick who I'm going to send it to. I'm, going to send it to Katie. I'm going

to send it to Todd. And now I'll send. So if you were to pull up... your... your email, you would see that, hey, I sent that out.

--- Tech On-site ---

CLINT

23:12 It's going to give you a picture of the technician, that type of thing to be able to say, hey, give that good communication to your text to your customer. Lastly, let's say that I was in route. I want to go ahead and clock out here... popped out. It's going to automatically ask me, hey, do I want to clock in on site? Yes, I'm on one site. So now you're going to be able to keep up with all those clock events where your technicians are at and how long they've been, you know, driving or been on site? Makes sense? So far? Okay.

--- Tech On-site ends ---

KATIE

23:44 Quick question. Going back to the... the, I guess the scheduler you can call them. If I've got say for instance, on maintenance, it's got maybe two or three guys that are assigned to do that maintenance. Each one of those guys will get that on their own tablet. Okay, those specific hours for each individual guy.

--- Tech On-site ---

KATIE

24:02 Like if I have like in that case of maintenance is a fixed amount of time. Does each individual guy, how does our Sean?

LAUREN

24:11 So, not quite, Clint, if you scroll up to the top of that page and then swipe over that's where Clint will be able to see who the other technician is on that work order. And then he opens up the services tile there in the top left, it'll show some of the, some of the step won't show for the technicians because it's permission base like they won't see the estimated price there if you don't want them to. But you can see where it says two hours.

--- Tech On-site ends ---

LAUREN

24:43 Maybe one tech was assigned to do the cooling tower, and the other one for the 500 time. They'd be able to see that. But yeah... how often are you sending out to tax on the same war quarter?

KATIE

24:57 For maintenance quite regularly? Because a lot of times, what we'll do is we'll send a journey going out to do the meat potatoes and then apprentices, just, they're changing filters type of thing and they each have a specific amount of hours.

KATIE

25:11 But sometimes when, I mean, I'll... I'll just be open with you guys. If the journeyman says all, I've only got this many hours of the job. I'm gonna take some of that apprentices hours. Then now they're fighting over hours that they can see who's got what, then it makes it the kind of head. But anything amongst the guys, if there's going to get dollars on the job?

--- Tech time tracking ends ---

LAUREN

25:31 Yes, is this... this is like fixed price stuff. So we know... we know this is going to be four hours worth of work and then maybe the dream and has three hours and then the other person has one or something.

KATIE

25:43 Yeah.

LAUREN

25:46 On that, I don't quite know how people manage that situation because I haven't heard that come up super often. So let me do a little bit of research and get back to you if that's okay.

KATIE

25:56 Okay. Yeah. And we can. I was just curious how it's normally done because I don't want to track, deviate from the norm so much. It's just figuring out how to make it apply to us within your system. Yeah.

LAUREN

26:06 Yeah, yeah, no, that's fair. What we'll do some research. Maybe I'll call Jeremy and see how they do it.

KATIE

26:11 Okay.

CLINT

26:14 Perfect. So yeah, you can see quite a few tiles here. But right away, I want to jump straight into the deficiencies because one, I know this is one of the better things we do. Also, I know that it's a... it's a headache for you guys right now.

--- Deficiencies ---

CLINT

26:27 So as a technician, I'm out here but to be working, but now I see a deficient deficiency or repair work. I can go straight down at the bottom and add this deficiency. Let's just say it's a broken compressor. And then as we go to do that, we can go next and we have like the seven step process to make… make sure we're getting plenty of information. And I'm also on these attachments, we can either do photos, we can do videos from a library or we can do even record audio memos. So I'm gonna take a photo of this battery I got right here on my desk. Yeah, we're gonna use that photo. I can go in. I can simply add that. Also if I wanted recorded audio, I can go in and these can be customer facing or just in the back office. But if I said, hey, Todd, this is Clint here. Have this broken compressor. Can you order part one, two three. Also when I'm done with the job, I'll let the customer know that we're going to try to get a quote out on out to them as soon as today, maybe tomorrow at the latest, something like that, you can save it and that will be connected to this deficiency as well. Are you guys currently, I know it's been about text messages, but are you guys sending out photos of what's broken or anything like that with a quotes?

KATIE

27:45 If it's something that I think the customer needs to CVS normally, not though just give them a quote of what needs to be done.

--- Deficiencies ends ---

CLINT

27:51 Gotcha. Well, well, I know that just based off the data of our customers that they've seen a big jump in quote approval. And I believe the number, correct me if I'm wrong, Lauren was like five photos. It made a huge job based off the data that we've you know, done research on… on with our customers. So might be some food for thought for you as well to be.

--- Deficiencies ---

KATIE

28:10 Yeah. There's that I've talked with it, utilize that and they said the customers see pictures and then they realize what the problem is and wanna fix rather than just looking letters on the.

LAUREN

28:22 They're not gonna go on the roof and look at it name, and I don't know what they're looking at, you know, building your might but a property manager that they don't know.

CLINT

28:32 Exactly. Well, this list, this is the severity of it. We're just gonna say and operable here. Now, this is going to be the… the asset. Like I said earlier, we're going to have this asset. Let's just say it is on this cooling tower. This is just going to be the service line that we have built associated to it. Now, if it's new fixed or verified, I'm gonna say this is a new one that we just found. And then lastly, hey, what's going to be the solution here? Keep it simple. Let's just fix it. It's pretty simple enough, right? And alright. So now we're done with that and we can simply save it.

CLINT

29:08 So as of right now... now, that is already in the back office, you can get a notification, whoever is doing these coatings top these quotes stop, get a notification that, that's in there. They would be able to go and look at that, which we're going to go to.

CLINT

29:21 Now, are there any questions of how easy that was for your technicians? Does that seem simple enough for them to be able to... to do that?

KATIE

29:29 Yeah. I mean, I know you're going through like three or four sets quickly about sure we'll get to that point? Understanding. But the other question I've got is, so we have accounts that are assigned to specific area managers when somebody put something in on this account and it gets pushed back to the back office. Does it just go into a global portion of the back office and everybody has access to it, or can we funnel certain accounts to certain individuals?

LAUREN

29:53 Yeah.

KATIE

29:55 Okay.

LAUREN

29:56 You decide, so you can have with some?

CLINT

29:58 People who will.

LAUREN

29:59 Do is like a service manager gets notified of... of everything like that... that might be a repair opportunity. But then like you can set preferences for individual users, like only show me like repair opportunities for the accounts that I own. So it really kind of depends on how you want to set it up but that the service history is going to be globally available to any who have the permission to view that. Does that answer your question?

KATIE

30:29 Yeah, because I mean, I could see our dispatcher. It'd be nice if she could kind of see everything that's pending to know what still needs to be addressed. But each of

those area managers don't need to know what everybody else is working on this. Do you know what they've got any time?

LAUREN

30:42 Yeah. Okay. I see what you're saying. So in service trade, there's a, you can see it right here on the job, there's the job owner Clint, so that's the person who created the job. And then this... this locations associated with Clinton's office. You can have different offices to represent different geographic areas and like filter your searches by only that office. So there's some flexibility there too.

KATIE

31:09 Okay. And then my only other question is I would hate to have my guys send something to the customer that was supposed to go to the back office. Is there a way to like either disabled automated? Clearly guys, this is customer facing. This is back office.

LAUREN

31:25 Yep. Yep. You can set global account settings to prevent them from sharing things with the customer that shouldn't be shared. So like think one example is be like maybe they take a picture of... of a pick ticket from the parts house and put it on that per quarter, and then you can make a global setting. Those don't get shown to the customer.

--- Deficiencies ---

KATIE

31:46 Okay.

CLINT

31:50 So as you guys can see, we're... we're back into the job. So I went to the job and if I go down here, I can pull up deficiencies that were on this job. So we can see this broken compressor that I ended up doing here. And if I want, I'm just gonna open up this. And now this deficiency, we'll have all that information that the technician brought down for me. You can see that, hey, this is the... the location, it was a broken compressor. What was the proposed? I can see if there's any deficiency history, any quotes that are on this. But now you can see that there's my picture and my audio that I did.

--- Quote templates ---

CLINT

32:26 So this would be, you know, wherever we can go and this would all will always be able to be onto this quote. But now, how simple click of a button we're gonna add to quote, when we go to here, we're going to create this new quote. Is it a repair? You know, is there a contract associated which will be able to get into later that will keep up with this? Let's say it expires by the end of the month. Here's, the asset associated with the service line and what the description was. Now, we can simply go to create quote. And now on this create quote, just like on the service templates, we're also

gonna have quoting templates. So if you have a lot of these that are, you know, kind of the same or things of that sort. I just want to apply quote template because I don't want to have to hold out a whole new one. And I believe I have a compressor one in here. I can spell it, see compressor replacement. So now this is gonna pull up that entire quote template description. It's gonna add all the parts that are normally associated with this. Now, I can simply just add these items to this description. But if they know that, hey, you know, what they're needed to be a trip charge or anything or maybe I need to change out some of the description, I could go in and edit that and this is very simple, go into edit. I can add any parts, trip charge, anything like that, and we can keep up with this pricing as well inside of service trade. So it correlates over there.

--- Quote templates ends ---

LAUREN

33:51 Before you save that, Clint one. Any questions about that from me?

KATIE

33:57 That's this is going to make things so much easier on our end. This is Jeremy button. This is what I fell in love with because they could streamline everything within a click of a button.

LAUREN

34:05 I'm not gonna allow you to you, Jeremy about October of last year.

--- Customer engagement ---

LAUREN

34:10 So almost a year... a year ago when they were kind of revisited service trade, he said, can I just buy this? Can I justify this? And we said no... and I appreciate your asking. But yeah, this... this is where our customers see like an immediate improvement. It's less steps, you know, that's easier for the customers to approve.

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

LAUREN

34:32 So you're getting... getting more revenue. But the other thing I wanna point out for you is where it says detail level for customer. And the top left, you can control what your customer sees and say, Clint, click that drop down and instead does instead of line items, the prices picks grand total only... that's a... that's a nice way. I know as they say where there's mystery there's margin. So you can, if you can get away with it, we encourage you to do grand total only and.

KATIE

35:01 We do with only 2000.

LAUREN

35:04 Yeah. Yeah. Yeah. So that can be a global setting. And then once he saves that, it's easy for him to send to you as well. So.

--- Accounting ---

KATIE

35:13 Hello. Hey, guys. See.

LAUREN

35:13 The customer improve it.

KATIE

35:15 It's actually gone, there will change based on the account. And we're at, does that automatically calculated based on where you set the account up initially?

LAUREN

35:22 Yeah. There's some... there's some tax setup that you need to do as... as it relates to the service trade account, but I think it's base. Well, I shouldn't say what I was gonna say. I think it's based on the location, but every state is different whether it's like origin tax or... or deliver. I don't know... you... you can configure it based on... on what you need to do.

KATIE

35:48 Okay. All right... all right here for this compressor replacement, all... are they like inventory items or how are those, how those get into there?

--- Parts management (inventory) ---

KATIE

36:01 And how do those get updated? Like current price?

LAUREN

36:06 Yeah, that's a good question. So, part of the service trade account set up is we kind of take your existing list with your standard costs and prices and upload that into service trade. And then you can update things as necessary. When... when prices change, you can do like bulk updates?

--- Quote templates ---

KATIE

36:25 So, if we don't have a standard, unless we can just start from scratch?

LAUREN

36:30 Yeah. I mean, I would you don't have to have like parts in there in order for it to work because you can create add hawk parts like... like these. All our... our, in our system, they have item codes and descriptions and things like that, costs and prices. I believe... Clinton... Clinton, sorry, Clint.

--- ST app contracts and pricing ---

CLINT

36:52 No worries that they're really close.

LAUREN

36:55 Hi, I'm if you click the pencil, I believe if you like update at costs on one of those items, that will automatically update the price based on the contracts and maybe that... that filter that you're on is it will do it if you change the quantity, but also change the cost on one of those. Make that 40 or 60 and it'll update the price so you can set up contracts to... to that kind of stuff's. Easier. But, yeah, there's ways to accomplish what you're asking.

KATIE

37:23 As long as it has a spot for us to put something into each of our guys kinda know.

--- Quote templates ---

KATIE

37:27 I mean, if it's a carrier or if it's a brand, you know, who the carrier is going to cost more, I can throw in a number to know at least cover.

LAUREN

37:35 Yeah.

CLINT

37:36 Gotcha. And then as you're continuing to build... build some of these out to even on these quote templates, they're already going to be in there for you. So that's what's great about the quote templates?

--- Deficiencies ---

LAUREN

37:46 Yeah.

CLINT

37:47 Alright. Let me, so that... so that messed me up. So now I'm gonna... I'm gonna send this to you guys also in here, this is where, you know, from the back office

standpoint, whoever is sending out these quotes. So let's say, I don't want this audio to be on there, I can take that off but I do want them to see the picture.

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

CLINT

38:06 And then I just simply send to the customer there. So if you want to check your email to give you a good look at what that, yes, and we'll make this a little interactive, just let me know when you get it pulled up.

KATIE

38:19 Yeah, I got it and you can prove it through this.

CLINT

38:23 Yes, you liked that big green button. Yeah... very... very Amazon ask, like I said, it's all about making my feet customer. Yeah, green for money. Yeah, the kiss method, right? Keep a sample state that. So I've been told that many a times. So, yeah, if you want to approve that, we also have a request for changes, but whichever one you choose to do, we'll go back to that quote and take a look at it.

CLINT

38:53 Do you need me to approve?

KATIE

38:54 It on my end to see what happens.

CLINT

38:55 Yes. Yeah. Just place.

KATIE

38:57 I just wanna make sure we're actually selling me something that.

CLINT

39:00 Yeah, yeah. You know, market your credit card a minute, don't worry.

KATIE

39:02 Yeah.

LAUREN

39:03 I did get an email, Todd saying that you're looking at the quote?

--- Quoting ---

KATIE

39:07 Yeah. So you can actually see the status of that as well?

LAUREN

39:10 Yeah, yeah.

CLINT

39:15 And if I look here Todd the back office, if I go to the history, see, I can see this right here, go to see the history of when we created it. When we put attachments, we drafted this quote, submitted it and what time you looked at it from your IP address?

KATIE

39:30 Nice. I see this making sure that I check the... the terms and conditions before it actually allows you to approve it too.

CLINT

39:37 Yeah.

KATIE

39:37 Okay.

CLINT

39:40 Did you get that approved?

KATIE

39:42 Okay. Yes.

CLINT

39:43 Okay.

CLINT

39:48 Went from submitted. Now, you can see it's approved right here. So, once that's approved now, I can go as simple as this, create this job right now from this particular quote. Or if one of my technicians are going out there next week, I can add it to an existing job and we can knock that out.

KATIE

40:05 So, now say, obviously I send this quote out. It sits for a day and it gets approved. The next day. Is there like a dashboard that shows us? Hey, you have a quote, it's approved or? Okay?

CLINT

40:16 Yeah. You, so you can get those notifications like Lauren was saying. But also, if I go into here, all of my quotes, which I figured that was going to be the next question. What's really nice about this? You can go in and do whatever reporting you want on all of these quotes. Also like the, to say this one because you get pulled an example out that, hey, you know what? I know they've submitted it and I know they've viewed it. I can put a date range in here. And even on my quote status, I like to say, hey, I wanna look at the ones that have submitted and viewed, but they haven't came back approved. And now I can go just like those service opportunities. I can go and resend Bob, all of these that have been submitted and viewed and put them back on the top of my customers email list. With just one click of a button, you can have all of it, makes it nice and simple.

KATIE

41:05 When it's approved, it removes it from this, puts it in another approval call.

CLINT

41:09 So, you can look right here approved without a job. So this has been approved like that one that you just did, that would fall under this bucket because I haven't put it to a job yet or things of that set or even did that made the customer hadn't even looked at it. So, you know what? I want to see a list of those and put that back in their... in their mailbox. So... all righty. So now, what I wanna do is I'm gonna take you back out to that?

KATIE

41:35 So, once it's approved though, now, like for instance, one of jobs approved, we send it to Katie to actually get the job number and getting basically generated for dispatch to send somebody. Is that what you're going to show us an hour?

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

CLINT

41:48 Yeah. So you can go ahead and create that job just like we did either. If I wanted to go ahead and create that job, I can create that job from there.

LAUREN

41:56 Back to the one tab over to the left. Yeah, right there. So there's a green button that Clint as finding if he clicks that this is... this is a great example of... of like you can decide which people within your organization get what notifications.

--- *Quoting* ---

LAUREN

42:13 So like Katie, maybe you want to get notified of all approved quotes so you can come in and review them and then create these jobs so you can say, all right, we want this job to be done by the end of September and then go ahead and put under the job due date, the thirtieth, and then you can attach all the... the... the pictures and the comments to that new work order.

LAUREN

42:37 And then once he clicks create a job from that quote, it'll create an entirely new work quarter. You don't have to do anything other than click that button and it'll automatically assign it a new work order number.

--- Deficiencies ---

LAUREN

42:48 It will designated as a repair. It'll include the description. It'll include the parts that were quoted as well as any of the... the pictures and files that the technician going out to do the repair might need to complete this work.

KATIE

43:09 Yes, no premium Jones.

KATIE

43:18 Sorry, we're having a little side conversation... when there's a... there's a little bit of a historical all school versus new school.

--- Deficiencies ends ---

KATIE

43:28 Yeah, on... on why things are done the way they're doing it and how this is going to change it dramatically for some people.

LAUREN

43:35 Do you think the old school and went out or the new school?

KATIE

43:38 The new school, well, for sure. If they've already been moving down that... that road, but I'm just thinking originally everything had to go through a certain individual before it was created, a job is created. And I'm thinking as simple as this is, each individual already mentioned and create their own job and just running with dispatch.

LAUREN

43:55 Or that person could be this person and service trade, but it sounds like if they're old school, they may not want to adopt a new... a new way of doing.

KATIE

44:03 Yeah, you're good luck, even turn on the computer loves to go to work.

LAUREN

44:07 The benefit that... that your cohorts to the north had was with some of the old school folks were retiring.

--- Paper process ---

KATIE

44:15 Yeah, same here.

LAUREN

44:17 Yeah. Okay. Well, there you go.

KATIE

44:19 They're they're already couple of 100 light years ahead of us at this point. So they've already been down the whole digital side we're just getting into and we have some old school texts that are going to be probably our biggest challenge too.

CLINT

44:32 Yeah. And I understand this changes change. But once these guys realize how easy it is to use it, I mean, it... it helps them out a lot too.

KATIE

44:42 Yeah. Well, I think that's... that's the biggest thing to this. Katie is already brought a lot of change in our office and given everything that happened with COVID and everybody having to change the workings you save this... this... this last year. So I think they see the benefit of it. It's just learning how to use it.

--- Paper process ends ---

CLINT

44:57 For sure. And we'll walk, you will hold your hand through all that process for sure.

KATIE

45:01 Cool.

LAUREN

45:02 Since Katie is sort of the change master, Katie. What are your thoughts so far?

KATIE

45:09 So this is just different than I'm used to and he's the... the use coins both or service, right? So this is a little bit different, not usable. It would just require more changes internally with the way that things have been done. It's almost starting over.

It's... it's basically starting over. Yeah, but... we didn't really bother investing so much in the spectrum just because like we didn't set up the equipment, we didn't set up.

LAUREN

45:47 Of the tasking.

KATIE

45:49 Just because we knew it wasn't a long-term solution that it was a whole lot of work that wasn't going to be utilized. So if this is something that we're gonna utilize and then be worth making the changes to make it work for us. And the reason we're at where we're at is because we wanted to look northern California, invest in software through pay process before we figured out what works for them and then pick it up on our end?

LAUREN

46:14 Yeah. And then let them... let them tell you what the growing pains?

KATIE

46:17 Exactly. You get all the mistakes and tell us what not to do and how to make it, right?

CLINT

46:22 What...

LAUREN

46:22 We should do is set you up with the same project manager so they can kinda help deal. I know it was... but we're getting ahead of ourselves.

CLINT

46:32 Hi.

KATIE

46:33 Clint, the reason I'm... I'm because I didn't ask any other guys as many questions I'm asking you only because I know that this is probably the direction that we're going. I just want to understand and make sure that even though our models are similar, there's still different. So I wanna make sure it still gets all the punch list items that we're looking for? What... what else?

--- ST app contracts and pricing ---

LAUREN

46:50 You wanna see today?

KATIE

46:53 I have a quick question about the estimate together or?

LAUREN

46:57 The...

KATIE

46:57 Proposal, how do you throwing that? She had lots of questions? Hi, how are you rolling? Like your tool charges, your overhead, you, this, that I sold labor rates that I saw materials?

LAUREN

47:14 Yeah. So there's different classifications of items.

--- Quote templates ---

LAUREN

47:18 They can be labor. They can be part, they can be fees, they can be services. I'm not as familiar with this account. But... but Clint, if you type in trip charge here, I think that is a fee. Yeah. And you can see right next to where the bold, it says trip charge, it says, it's a fee. You basically can just set up like your... your main list of items and it sounds like don't want to do, but yeah, you can define what items are, what type of things and then run reports from there.

KATIE

47:53 Okay. So, like for instance, if you're gonna do a compressor, we have a vacuum, palm charge, we have a record.

LAUREN

48:00 Yeah. Okay.

KATIE

48:02 On. And now there's someone physically putting those charges on the ticket, is there a way to auto populate though?

LAUREN

48:09 Yeah. If you remember when Clint, when he was creating that quote, he use that template, those templates can include all the... the labor and fees, that... that kind of relate to that, whatever it is.

--- Tech On-site ---

CLINT

48:24 To say that right now, Todd, when I go back into the technician to finish out this job, I haven't put anything in as a technician or anything which I can, but these were

48:41 Okay. Did you get the other questions or... or your way? Okay?

CLINT

48:47 Going back to this, I know I want to get to that deficiency first and I'm glad I went right to it because now I think you easily see the value in that. But if I go in here, just these tabs real quick, we've already went over the services.

--- Recurring maintenance ---

CLINT

49:00 There's some comments here. I can look up contacts, but if we look at these job items, these are the ones for those two. I think they were a BI monthly on a monthly that I had to do on my services. And this was a cleaning fleet fee and it cleaning labor for each one of those.

--- Quote templates ---

CLINT

49:16 And if I needed to, I can go in and add apart. It's a technician. Maybe they're like, hey, I need to go in and add that trip charge or anything like that. So I can go through here and what's great about it too. That might help you guys out.

--- Parts management (inventory) ---

CLINT

49:29 If they're having to go back parts or anything. Now, I can go in and say, hey, I'm going to the parts vendor, I used it from this warehouse or which technicians truck I got it off of. So there's a lots of different options that... that technician can go and add it themselves if they needed to. If you didn't added in the back office. But before you go an invoice, you can also add it in the back office as well.

KATIE

49:51 He mentioned something just brought up a good question for me. So truck stock, is there a way to keep inventory of what's on the guys trucks within the software? Like if the text tablet says he's truck number one, truck number one has this stuff on it. Let me...

LAUREN

50:08 Take that one natively. No, we do have a product that does truck stock called partsledger. If you ask Jeremy and James, they will tell you to wait on that because it... it has been a headache and a half. It was almost like implementing two different software systems at one time because it... it does inventory management and things like that.

--- Tech On-site ---

LAUREN

50:33 They can look up truck stock, but... but I think it created more problems than... than streamlining.

KATIE

50:40 Very...

LAUREN

50:41 Yeah.

CLINT

50:43 Perfect. So now what I want to show you, we go through, we have our services, we're going to complete the services. Now, we want to get a sign off so we can go in and create this work acknowledgement that can go in and see what services the technician sees that each one of these items are okay. They can simply hit review. And now they can give us.

--- Tech On-site ends ---

LAUREN

51:04 Back, go back one.

CLINT

51:06 I forgot the.

LAUREN

51:08 Yeah, yeah.

CLINT

51:09 You can have Katie. Okay. So I'll just put Katie on there or just Todd, one, whichever one Todd, you've been looking at the other one. So I'll put Todd on there, can review it. And then now you can turn this around.

--- Tech On-site ---

CLINT

51:25 Let the customer go. That could view the services, whatever t's and c's that you have. They can simply click that and then they can confirm and sign it. So you have it there. Okay?

KATIE

51:36 Hi, this is the work quarter after the work has been complete.

CLINT

51:40 Yes, ma'am, that is correct. So, it's just a.

KATIE

51:43 Technician side of things. Yeah, yeah. Okay. Yeah, he just didn't whatever job.

LAUREN

51:48 Fine.

KATIE

51:49 And then that process sends it to the customer for.

LAUREN

51:52 And knowledge that you did.

KATIE

51:53 What you said?

CLINT

51:54 Or if they're... they're in front of them, they can get assigned, bother... bother the customer right there on their I pad or iPhone, and then they can email it to the customer. It would be in the back office as well.

LAUREN

52:05 Go ahead and do that in the signature process.

CLINT

52:09 Okay, perfect. So, this is where Todd, you only a lot of money. You already just signed off on it too though.

KATIE

52:19 Yeah.

CLINT

52:21 All the information's there next. So now we can just simply go sign it off.

KATIE

52:26 Is there, is there a way to make that mandatory before job can be close?

--- Tech On-site ends ---

CLINT

I don't think so.

KATIE

That's a deal breaker.

LAUREN

No, no.

KATIE

And email a?

LAUREN

Copy to?

KATIE

Problems we have with our text right now? Is that they don't want to check out with the customer, they really?

CLINT

Wow.

LAUREN

Are you guys union?

KATIE

Hello? Yep.

LAUREN

So, you can't like with hold while, I guess you can't do that.

--- Tech On-site ---

KATIE

Within five minutes worth?

LAUREN

Yeah, I mean, there is a checks and balances were back in the office. If you notice they didn't get a signature, you can say, hey, I'm not closing out this job until you get a signature from the customer, and you can like reopened the job.

--- Tech On-site ends ---

LAUREN

53:13 So you ultimately get to, and you can see it in more real time than if you're kind of dealing with those carbon copy papers. It's not the perfect solution, but it is a solution.

CLINT

53:25 Right.

KATIE

53:26 Other good question, Clint that popped up when you're doing that, say, for instance, I know I was... I was telling, I forget his name of the guy on the phone and talk to our customers, have probably a better relationship with our text, which technology is very dangerous. But the good thing is that they chose to profit, hey, while you're on site, take care of this... this.

--- Tech On-site ---

KATIE

53:45 And this, can the technician then create some kind of... convey you at that point so that we're not having to do... yeah.

LAUREN

53:56 Yep. If you want to allow... allow the scope creepers to do that, there are ways the technicians can add services to an existing work order, or are they create a new work order that is completely permission based?

--- Tech On-site ends ---

LAUREN

54:12 So you decide which technicians can do this, maybe the journeymen get that permission, but the premises we don't want. So you ultimately decide.

KATIE

54:20 And they can actually set it up as like a change order to an existing one or a completely new one because it was kind of a po, obviously can't put it on the existing one. I got an.

--- Tech On-site ---

LAUREN

54:29 Yep. That's correct. Okay.

CLINT

54:33 Okay. So what I wanna do is I want to complete this job so I can go down to the bottom to clock out here. I'm just gonna open this up. So it's bigger. So now the clock

out, it sand mark all complete whoops, mark all complete hit. Next. Now we can go back into.

LAUREN

54:51 You didn't clock out... you go to next at the top, right?

CLINT

54:57 Yeah. And then I hit it and I messed it up. So now, san, are you done at this site? So now I am done at the site... and let's go back to this job. And now you're gonna see this is different job... how you can see in real time. How it's completed here... earlier. It was open. Now it's completed by my technician. Now, I can go and look at everything, make sure that this was done correctly. I can look at their clock events and say, hey, you know, what are they weren't telling me? Blah, blah, blah, Lauren needs to clock out that type of thing she just did now. So now you can see how far away we were, and.

KATIE

55:40 Basically, or is that something we select how much they see?

LAUREN

55:44 Question. You should show the service line?

CLINT

55:47 Yes. So let's complete this job on the back office standpoint, let's show the service like first.

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

CLINT

55:59 And now I can send you this, I can put what job description with job services, but won't parts and labor on it. Any attachments that we got some good stuff. So don't want the audio.

LAUREN

56:13 Two appointments on the top left yep, right below job description that's where I'm Todd, you can toggle on and off whether or not you want your customers to see the actual time, the text for, okay. But again, that's up to you what you want to share. Yeah.

CLINT

56:34 So now, just from a customers customer standpoint, I'm going to send you these guys. Again, I told you this would be interactive but I think it's important for you guys to see this. I'm going to send that and then I'll pull it up on my screen as well.

CLINT

56:55 So now you're gonna be able to see this service length of everything that was done that we wanted them to see any files that were associated with it on this form section that we added. And then also any alerts open deficiencies that we have. So the customer's going to be able to see that.

--- Customer engagement ---

CLINT

57:14 Your customer, how would that impact your customers getting stuff like that after... after services completed?

KATIE

57:21 That would speed things up on a hard tremendously. So, I mean, and this is just me being brutally honest. Does every job get three or four emails that you're sending mean for everyone? My customers?

CLINT

57:34 That's going to be part of your processes. Obviously sending it if they want to get a notification, you know, it comes down to like I said, the whole over mentality if you're taking a, whoever you want to know how far away your driver is, could be the same way with... with some of your customers. If some people are getting bombarded, obviously, you don't need to send, you know, everything out. But a lot of this stuff is, you know, as far as being able to see that you want your customers to see the work because you're being transparent also back to that customer service, obviously quoting standpoint, things of that.

--- Recurring maintenance ---

KATIE

58:06 So if I have, if I have a customer that maybe has like three different departments within the same building, some guys manage certain equipment, some guys manage others. Is there a way to differentiate between an account with receiving all this stuff?

CLINT

58:21 You want to get that? No go ahead.

LAUREN

58:22 Yeah, somewhat, so go over to contacts and then the middle top over there and click that open. So you can... you can kind of distinguish between your different contacts like Todd, your Katie, your management, but you also have the ability to go in and kind of designate someone else as like, you know, this, these people cover this building at this campus or those building.

--- Recurring maintenance ends ---

LAUREN

58:46 So there's ways you can do that. And then... then when you go to like bulk send appointment reminders or quotes, like you decide which contact type would get that kind of thing. But there's not like real safe guards where you go in for each individual contact and say, do they get invoices, yes or no? Do they get quotes? Yes or no? It's... it's a little bit more of a personal touch, so not, but... but there's still some of that... that you can do.

KATIE

59:12 Okay. What?

LAUREN

59:13 Would be your preference? I meant... I meant to ask what would be your preference and how much correspondence your customers yet?

KATIE

59:20 And various per customer, some customers want to see everything. Some guys just want. The invoice told me it was done.

LAUREN

59:26 Yeah.

KATIE

59:28 But the other thing too is like we have a lot of times I'll deal with the building engineer. But then when the jobs done, it gets invoiced, property management. I mean, is there a way to keep your buildings here from seeing everything all the way through or the property management, seeing everything? Always only getting the end result.

LAUREN

59:45 Yeah. I think... I think the devil's in the details there. I think some of that would be processes that you guys would define based on what you know, best. It's hard for me to give... give a recommendation one way or the other without knowing each specific situation. I think it will vary depending on who you're talking to. There is something cool like Clint. If you go to complete the job and create the invoice. Since you brought up Todd, some people would get the invoice and some people wouldn't Clint.

--- Invoicing ---

LAUREN

1:00:15 I'll go ahead and create an invoice from these items. And then you can actually send like the property manager and actually build a property manager. If you want to, you can still do it through spectrum. But if you want to, you can send the invoice from service trade.

--- Invoicing ends ---

LAUREN

1:00:28 And when Clint goes to send that invoice, like we'll just ignore the price is wrong... go ahead and send that and then pull one up.

KATIE

1:00:40 I can see once the jobs are complete, whoever is Laurie can take an Simpro who attended cent cpi reading, forget uploaded to the platform.

--- Invoicing ---

LAUREN

1:00:51 Yeah. So you could send this?

KATIE

1:00:53 Probably a third party thing where to upload your invoices into their system and stuff.

LAUREN

1:00:58 Yeah. Like service channel or curry go.

KATIE

1:01:01 Yeah.

LAUREN

1:01:03 Yeah. You can do that. So up at the top above that pay now button, obviously, our preference would be for the customer pay this way, but you could download this PDF and upload it to one of those portals. But if the customer actually wants to pay through this, like Clint was just showing they can do a CH or credit card, he kinda define the terms of what she want to be able to accept, which credit cards in which rates are fine, and... and teas and stuff.

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

LAUREN

1:01:30 But the other thing that they could see is if... if a client were to click that blue arrow there, go to the service details that allows the person that's actually paying the Bill to kinda see the details for related to that invoice of all the work that was done. So there's at the end of the day yields less questions potentially. I'm not sure all your customers would appreciate that, but certainly someone.

CLINT

1:01:57 And also to take that a step further, this is the same as that service link that we sent earlier. Now, you can have this and just one email if it's the same person.

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

KATIE

1:02:08 Yeah.

KATIE

1:02:14 How about if I've got, and again, this is just throwing stuff out there. I've got customers that try to bend the rules and all I need you to take money off of this invoice and put it on this one type of thing or we want to still get in and kind of pieces things apart.

LAUREN

1:02:34 I mean, you can edit the invoices... you can certainly edit things and you'll be able to track the history of who made edits internally. I'd want to know more about the situations... to kind of tell you the best way to do it. That might kinda mess... mess up some of your margins on specific work orders, but it doesn't sound like that's an issue.

KATIE

1:02:59 That's not something regular, but it does... it does happen. Yeah, I figure out some of the weird things that would pop up. It would keep our hands tied if we had an.

LAUREN

1:03:08 Sure. Sure. Yeah, I mean, that's kinda hard to kind of advise me on things that are like the exception and not the rule but I mean, there's a lot of flexibility that you have in service trade. There's. Obviously like the best way of doing things and like the best way for you might be different than your I'm gonna keep saying cohorts to the north cause it rhymes. So some of the, some of that your project manager will help you figure out through your implementation.

--- Accounting ---

CLINT

1:03:38 Any other?

KATIE

1:03:38 Questions? Yeah. So how does this, if we are using service trade, we then no longer using spectrum visit all everything service tied up in service trade or how does that back and forth with that information?

LAUREN

1:03:57 Yeah. So from what my understanding of Western is... is that they, they're generally doing their entire service workflow from start to finish from the work order creation to like actually performing the work quarter and then subsequently like getting to the invoice stage. All that happens and service trade. And then we actually built for them. What's called the service trade accounting connector. We actually

built a couple... couple of workflows for them that allows you to push invoice and financial specific information from service trade into spectrum. So that.

KATIE

1:04:39 Yeah, exactly.

LAUREN

1:04:41 I believe it's... it's basically a glorified it's like an excel import with lipstick on it.

--- Accounting ends ---

KATIE

1:04:52 I think conductor.

LAUREN

1:04:54 Yeah, service straight accounting connector and those... those we kind of scope out and kind of customize for each specific. It's perfect. It's more. Yeah, Jeremy would now.

LAUREN

1:05:16 And we can also schedule some time with... with our... our, the project manager, Patrick, that worked really closely with... with Jeremy and James. We can actually schedule some time with him and he can speak to that as well of what we did for them. And... and you kind of tell me what you could be better?

KATIE

1:05:37 Are gonna take a visit up there and kind of see how everything runs through their standpoint and then figure out how we need or tweak it over. Just stay straight from that type of thing and figure out how we go from there. But we're... we're also probably not gonna even roll this thing out.

CLINT

1:05:54 No, no.

KATIE

1:05:54 You're prepared because we're gonna be trying to shoot for still February with this thing. So let me ask you this. I know Jeremy was saying it probably isn't beneficial for us to have like a trial thing with a few text. He said he almost got to just dive in and completely you agree or is that just because they were where they're at with the service spectrum module now to jump into this? Because we still have, I mean we're carbon copy, anybody can pick something up and continue doing it the way they are. I just don't know if there's any benefit to us, given us a trial with two or three guys and having them work all the bugs out before we roll it out to everybody.

LAUREN

1:06:33 We certainly see people do that. The problem that you run into when you do it, do like us like a trial roll out like that is like whoever is supporting those technicians on the back end usually ends up doing double work. So you're so, so inevitably someone in the office is doing things the old way and the new way and... it's just... it's just a lot. I don't... I don't know if I would put Katie through that.

--- *Implementation and ongoing support* ---

KATIE

1:07:03 Super solid.

LAUREN

1:07:11 Yeah, I... I tend to agree with Jeremy is approach... but... but again, our... our services team are you, your dedicated project manager would kinda be with you every step of the way. So they would... they would be with, you... you know, they'd have weekly calls with you during your like eight to 12 week implementation. They would kind of help you kinda get the right data into the service trade account. We'd actually like set up your service trade account for you. Let you give you the opportunity to review that the data looks correct, maybe kind of advise you on best practices for creating like a sort of a standardized item lists since that's something that doesn't currently exist. We can import like your... your maintenance schedules. So, so you're relying less and less on running those reports through spectrum. And then there's also like interactive training courses for both the office and field users. So you guys not only are getting like the one on one experience with your project manager, but also like a standardized like here's, best practices, take these tests and watch these videos.

--- *Access to information* ---

KATIE

1:08:19 You get access to that before we jump into this just to get familiar with it before jumping in. Yeah, the other question is to, as you said, you help us get set up. I mean is it is an app that then gets installed them all the field guys stuff and it's already setup for them or is there certain stuff that has to be done on the field side too?

LAUREN

1:08:38 Yeah. The... the field stuff is honestly the easiest, they would download the service trade ap on their device whether it's android or iOS. Like you decide. The... the heaviest lift is on the office side of things and making sure that your customer database and all the data that goes along with it gets into your service trade account. But the office in the field views of service trade are all connected since it's a web based application. And there's an app that kind of runs alongside that. For the field. Anything that set up in the office will will subsequently be set up for the field without any extra work.

--- *Accounting* ---

KATIE

1:09:14 So the import of all of our accounts into the software is done by you guys or that's something we.

LAUREN

1:09:20 It's a little bit of both. So we would rely on you to give us the data. And then there may be, you know, some back and forth like, hey, you know, I notice there's some duplicates, let's kinda like much this data if we need to and clean it up and scrape it. But... but at the end of the day, part of... part of our service that we provide is importing that stuff into your account. So you don't have to.

KATIE

1:09:43 Okay. And is it... is it the whole thing based on number of users or how do you guys structure?

LAUREN

1:09:49 Good question.

--- Pricing ---

LAUREN

1:09:50 So it's number of technicians. So we've aligned our pricing with how you make money, which is your field techs. The way we see it is anybody any admin users or overhead? So we don't think it's fair to charge for them. So you guys would probably be either on our premium or enterprise plan, which raises ranges from like 119 per month per tack to 159 per month per tack.

--- Pricing ends ---

LAUREN

1:10:16 The... the, nor the northern California branches on the enterprise plan because they really like some of the features that come along with it from like a with reporting standpoint. But the premium plan would be a great place for you guys to start considering you're... you're kind have like you said a little bit behind of where they were when they started with service trade. So either one would be a great fit?

--- Pricing ---

KATIE

1:10:40 Okay. So if we sign up with like the premium one, we find that we're not using half of these features. Is there a point where we can default down to something else or is it you're in it for a year? And then you gotta figure out what you're doing and following year. How does that work?

LAUREN

1:10:52 Premium would be the minimum I would suggest for you considering your interest and connecting service trade with spectrum that being able to do that is... is you would need the premium plan.

KATIE

1:11:03 But the premium plan doesn't include this account and connect to that's. Something separate, you said?

LAUREN

1:11:08 Correct.

--- Accounting ---

LAUREN

1:11:08 Yeah. We, that was something we would want to scope out what most people need. It as it relates to the accounting connector are three things. Hey our ap and payroll for you guys. Since you're not started with partsledger, probably just the ap and payroll. We would kind of create like a custom report to import and export from service trade and just spectrum again that glorified lipstick wearing CSV file and that, that's relatively inexpensive for what it is.

--- Tech time tracking ---

KATIE

1:11:42 Okay. And you just mentioned time cards, how does that all play into this? Is it something that's choked out automatically based on the guys daily usage?

LAUREN

1:11:50 Yeah. For union companies, it's a little bit different than just the actual clock in and out time. But like... like, you know, like how Clint showed you, he clocked in, he sent the notification to Katie. He clocked out. Most union contractors don't use that to do payroll there instead of doing like the billable hours. Yeah. So, so the technicians are able to document for the labor item that they use on a work order that it came from them. So we could say Clint was responsible for two hours of that cleaning labor, and Lauren was responsible for the other two hours. And then you can pull the report at the end of the week that shows like, hey, Clint had two hours allocated to this workload. Lauren also had two hours allocated to this work order.

KATIE

1:12:41 Can we like search per tech? Say, okay, Clint hours for Sunday and Monday type of thing? Can we Sunday... Sunday type of thing? Can we do that?

--- Forms ---

LAUREN

1:12:51 Yeah.

KATIE

1:12:53 Because I think the state of California actually requires you show that with their breaks. And right now, our guys are filling out not only their work orders but

they actually have to fill out a time or two at the end of the week because the state requires.

--- *Tech time tracking* ---

LAUREN

1:13:05 Yeah. We might want to consider the service time card for you. It's pretty it eight. It's not quite up to the labor standards of California because we all know that's based on like shift work and not this kind of work. So it doesn't do things like hey person you didn't clock out after five hours, took your 30 minute lunch. So he doesn't do that, but it, you can summarize those hours on a weekly basis. And there's like a little check box for your technician to say, I certify that these hours are true and that this is what I worked. So I can... I can throw together sorta... we'll... we'll obviously send you a follow up email with some things probably like pricing this recording, maybe some other resources.

--- *Purchase decision* ---

LAUREN

1:13:50 And I'll send you like a quick little, a little thing about the time card. So you can see what that looks like too.

KATIE

1:13:57 Okay. Yeah. A little curve ball too.

--- *Accounting* ---

KATIE

1:13:58 So we are one department under the same company with four other departments. If we're utilizing somebody's promoted and target on a job here, but they're not a technician user within service trade. How does that affect their?

LAUREN

1:14:14 It's easy to create users. We do like account audits just to make sure that your account, your tech counts align with like your subscription, but it's easy for you to create a user if it's just like a one off thing, and then deactivate them if... if that's something that happens like are you meaning like from like the construction?

KATIE

1:14:36 Yeah. Or if I have a controls guys went out there were by the hair balance or if somebody gets, I mean.

LAUREN

1:14:42 Yeah.

KATIE

1:14:42 Very seldomly. Does that happen? I hate to create a user and then delete the user and a half just to get an actually creative and delete them. Yeah, just the job data that we created and service trade, that landing effective.

--- Assets ---

KATIE

LAUREN

1:14:58 What data do you mean?

KATIE

1:15:01 The job number and whatever phase codes or whatever it is that we set up in service trade, well, that doesn't live in?

LAUREN

1:15:11 I would say most of the jobs specific information like... like the repair recommendations, the tasking sheets, the completed tasking sheets, pictures, things like that... that would live in service trade.

--- Accounting ---

LAUREN

1:15:24 And there are certain things that can be kind of pushed from service trade into spectrum through that accounting connector. And I believe that job numbers or one of them, but we'll have to, I recommend that we schedule some time with Patrick, who knows more about what we did for spectrum with your cohorts and, nor Cal.

--- Accounting ends ---

KATIE

1:15:46 That's built specifically for our New York just there add onto service trade, does?

LAUREN

1:15:52 It's built specific to your needs. So I believe the job numbers one thing that can go into spectrum.

KATIE

1:16:06 Yeah. Is there like a general dashboard that you can show us? Yeah, like what a dispatch receipts?

--- Dispatch ---

CLINT

1:16:17 There, there's two types of things. This would be like logging in. This is what I call home base. And so this is really just a few different buckets of everything that's

going on. This is your daily schedule of everything going on today up here. These are your.

LAUREN

1:16:30 Hi, I'm sorry to interrupt, but keep in mind this can be filtered by what you need to see. So, so Clint has this filter to adjust the planning office, but he could go in and say, show me the plumbing and Clinton's office, which is in front of the right? Yeah. And then you can save it down at the bottom.

LAUREN

1:16:55 But then I'll let... I'll let Clint finish the rest but I wanted to point that out because our, the job that we just did wasn't on there.

CLINT

1:17:03 So we would have these jobs here. This is the preventative maintenance, the alley fitness in San Diego. It was like she said, filtering the offices out. And if we see anything that's overdo that we haven't even made appointments yet, we need to get those on as somebody schedule. These are without appointments that are coming up. So we don't obviously want these to fall into overdo bucket. So we need to get rid of these as well past jobs, mark complete. Like we went through, these are completed by the technician. Now that needs to be completed by the back office. And here's some that are completed jobs, but they haven't been invoiced yet. So little things like that. Yes, you can filter out. We also have a dispatch board that if you want to go and see your technicians, you can see myself here. You can also go in between offices if you have multiple office offices setup.

--- Dispatch ends ---

CLINT

1:17:53 But now, yes, you can go in and see here and you can, you know, add jobs from... from this dispatch board. Any... any questions there? Does that... does that answer your question first off?

KATIE

1:18:08 Yeah.

CLINT

1:18:08 So... well.

LAUREN

1:18:11 Sports, are you, what kind of dashboards would you wanna see?

KATIE

1:18:16 Well, I'm just trying to determine like how it will affect workflow between the office people because, you know, right now we're it's before we went digital, it was a paper folder was created and then that the portfolio into the dispatcher, which then

went to the purchasing, which doesn't want to billing, which then led to our back end of that. So, how to best make our workflows work with this software? Just... yeah.

--- Dispatch ---

LAUREN

1:18:56 I would say Clint, if you go back to that main dashboard, kind of the different... the different buckets here at sort of have a high level overview of the status of different work orders. You... you guys can kinda define within your processes like who's responsible for which of the bucket. So overdo jobs might be a job for a service coordinator whose... whose responsibility is to schedule things or follow up on things that... that we may have missed from last month jobs, without... without appointments during the next two weeks. Same idea. But if we scroll down to the bottom, the... the folder for the accounting team might be completed. Jobs be invoice that's really anything where the invoices ready to be sent to the customer. And then just above that would be probably the service manager bucket, past jobs to be marked complete. So, so I think it kind of aligns with what, how you're doing things now? And then just the digital folders look a little bit different than... than what you guys used to do?

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

KATIE

1:19:56 How does purchasing fall into this with POS and deploying those, the jobs and all that good stuff?

LAUREN

1:20:02 Yeah. Hi, can you remind me how you do that now? I don't remember what been told me.

KATIE

1:20:07 So we've actually got a purchasing agent that we'll do all of our ordering.

--- Parts management (inventory) ---

KATIE

1:20:12 And then she has a excel spreadsheet that she logs just the generic information. But then within spectrum, she has to take everything that was purchased and allocated to that job. Yeah. And then somebody somehow finds that and applies to, I guess, I mean finds it puts it on paper. Yeah. What all the... all the information in the VM module then gets translated either to the work order module by the job module or the service contract module where.

LAUREN

1:20:41 It is. And then, yeah, that's all... all into the invoice. Yeah. So the... the... the parts purchasing module are the parts management module I was referring to earlier that does the inventory management also does the parts, the purchase order management as well. I will say this, I don't know if that process is going to get much

easier but it's certainly won't get any harder if you're not using that part's management module that we have. What a lot of people do is just use the service, great job number as the purchase order number, and then just mark that either in the excel sheet or in the spectrum somewhere.

--- Parts management (inventory) ends ---

LAUREN

1:21:25 We can kind of hash that out with Patrick to, since he... since he knows a lot more when we kinda schedule some time to talk about spectrum, we can get his recommendations on how to do it since he's worked with a lot more existing customers and I have... I think it's just gonna be one of those things that is still gonna be a little bit more manual until... until you're comfortable and implementing the inventory management piece of what we do.

--- Parts management (inventory) ---

LAUREN

1:21:52 Yeah, they actually use partsledger. They use that inventory management and they, they're kinda sad about it because it's it works okay, but they... they just wish they had an implemented it all at once and back.

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

LAUREN

1:22:07 I think they were a reference for... a contractor up in Seattle and they said the same thing. They said, wait on partsledger because it... it kinda change too much all at one time.

KATIE

1:22:23 Somebody has input all the parts or something. Yeah, your stand, how the po, as well and talk to your job data in. Yeah. So this is generating invoices, but is that specifically off of those, the... the items that were shown? I mean that... that costs there is what's showing the invoice. So if we're gonna do that, the thing if we have a peo that's written against one of our jobs work, is there gonna be a committed costs that lives somewhere?

LAUREN

1:23:02 The costs will live in service trade... pull up... pull up the job that we did. You just go right here on the dashboard. Nope, go down, yeah, pull that up. And then... I'm gonna have you reopen this job, Clint... and then scroll down to the part section and click the little edit, pencil... go ahead and add a job item... and then pick like a fan or something... that might not be, click... click that and see what it does. Okay? That's fine. And then under source, this is probably what I would suggest the.

KATIE

1:23:50 You know, the reference there?

LAUREN

1:23:52 Yeah. Say the reference number.

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

LAUREN

1:23:53 It could be the po number... and you could type that in there. And then you'll notice that item already populated the cost because we had a standard cost. But if the item doesn't have a cost, the purchasing person could put that in there and the price would automatically market based on whatever contract you use for this customer.

--- *Invoicing* ---

KATIE

1:24:15 If that field isn't completed, it will allow you to post a job when somebody actually close the job and go without it costing.

LAUREN

1:24:23 Yep. That could happen. They happen.

KATIE

1:24:27 This material data isn't going to then push to spectrum so that our ap Lindy campaign gambling strange.

CLINT

1:24:39 Hello?

KATIE

1:24:39 Alright. Alright. He won't pay that invoice unless there's a feel and there, and those dollar amounts match.

--- *Purchase decision* ---

LAUREN

1:24:48 Yeah, I'd be interested to kinda see that process and then meet with what again, meet with Patrick who... who has more experience with this than I do and have them give you better recommendations. And I can't because I'm not as accounting minded as most people believe it or not. I don't know if you will.

--- *Purchase decision ends* ---

KATIE

1:25:05 Well, we'll probably that's the kind of stuff that wants to figure out before we start diving down this whole.

LAUREN

1:25:12 Sure. It out as we go... we can... we can figure out a lot of it ahead of time. But I would say sometimes people... people shoot themselves in the foot trying to figure out everything before they even get started. Whereas like you might... you might trial and error like two different things and say, okay, this works better for us and that's... that's again, the benefit of having like a dedicated project manager to kind of guide you through those choices.

KATIE

1:25:39 That, the problem that we're facing though is because we're one of five divisions or sort of small potatoes like since Ron, just, yes, it's us making a call for service. But what is the call that we make? Doesn't line up with the accounting. Then there's a shit storm with phase because sure, yeah, that works great for us. But then piss off because of the accounting... the accounting department is look those over again and then they'll shuts down.

LAUREN

1:26:13 Yeah. I... I empathize with that view since it's just us talking. What we've found what we've found being successful is service divisions that kind of step up to accounting and say, hey, look where the more precious resource we have fewer type like technician work when you have account, what, I know... I know, it sounds crazy. They won't... they won't buy it. You just go in and with like, you know, torches, but reads a great example down in San Diego. They actually spectrum too. They don't even integrate with spectrum. They have some admin staff to kind of support the service teams efforts of getting the invoice information from point a to point B. But they said that the county that doesn't matter to us because service trade is the only change we made in our business and our profitability went up 20 percent and we're not gonna let accountant one person and accounting pushed us around just because, you know, they're cheese got moved. I hear what you're saying and I'm sensitive to it because I... I know those types of personalities, but, you know, at the end of the day, I think... I think there's... certain... certain battles you wanna fight and I... I think that's one of them but I again your call.

KATIE

1:27:30 JV focus it. Yeah.

LAUREN

1:27:33 Yeah, yeah. Color.

KATIE

1:27:36 Their own spectrum also didn't realize that. Yeah.

LAUREN

1:27:38 Yeah.

KATIE

1:27:39 Okay. Off the call her, I'll figure out how they're making an.

LAUREN

1:27:42 Yeah. Give her call. She... she takes anybody's call. I swear denied. We're not paying her. You might think that... software that we don't but she's a great example of someone that said accounting. Just let me do my thing. I know how to run service. I'm a principal in this business. This is my thing. Just let me do it. They did.

KATIE

1:28:03 That's the difference is she could call it a shot. I mean, we have.

LAUREN

1:28:06 Partnership...

KATIE

1:28:07 Division. I mean, we're just like northern California got partners. I gotta deal with lever there you go to your international centerville.

LAUREN

1:28:13 Yeah. Well, we'll strategize... we'll strategize together on the best approach to that. My approach probably isn't the best one but we have... we have resources on the service trade team to kind of help you manage those conversations. And... and we've got really a lot more accounting minded people that can kind of help us advise you better than I can.

--- *Purchase decision* ---

KATIE

1:28:34 And their adviser accounting department.

LAUREN

1:28:37 Hello?

CLINT

1:28:40 Get him on the call.

KATIE

1:28:42 Okay. Okay. Anything else you can think of... right now? What other resources? I guess we can just kinda talk and figure out what the next thing that we actually need to figure out is because we went over things right now, but I guess what I was talking to southern California and we got a scheduled time to get up there. See how the plan was after summer. I mean, we're services, obviously Summers are go time. So once things cool down for us, we're going to go visit them after they've been through a summer with service trade and figured everything out and then kind of see how we implemented here and then try to get it rolling like around February. My kids also got something going on. It's gonna take her out for a little bit. We might have to pump the brakes on our plan a little, but we still want to dabble and figure

out how this works. I was saying you got some of the training stuff that she can maybe dig into all she's out and just figure out what it does or doesn't do or how we can utilize certain things and not others.

--- Purchase decision ends ---

KATIE

1:29:47 Maybe we can start doing that and then also get in touch with them nor Cal guys. I'm probably gonna call Jamie too because if she's already been down the road to, she's to somebody who's not afraid to speak for mine too. So she'll tell you stay away from this part of it's crap, but do this and then at least kinda feel everybody out. Not that I'm going to get it perfect the first time around, but I'd like to try to add a plan and a big part of that, we have to figure out this whole po, thing and job costs for every job before it gets invoiced southern calendar to make sure that they're getting there in straight to pay our vendors based on what we're building.

LAUREN

1:30:24 Yeah. Ask her how she's doing that because I know she's presented with the same same issue because services just a piece of what they do. And I... I quite honestly don't know how they do it.

KATIE

1:30:35 Partsledger...

LAUREN

1:30:37 No, not for a lack of tying.

KATIE

1:30:41 She's got something figured out that it's not, it's outside of your system.

LAUREN

1:30:44 I think she through admin at it. I think she just said I'm gonna hire, I'm gonna hire one person and that's all they do. I think that's what she did. I think they hired some... some persons like daughter or niece or something.

KATIE

1:30:59 Okay.

CLINT

1:31:01 And Katie, when are you going to be out?

KATIE

1:31:04 No, never fed... through. I don't know six or eight weeks.

CLINT

1:31:11 Okay.

KATIE

1:31:17 Are good time is the, when the only time we can make changes and this is now the third winter where we are missing opportunities where they're gonna give us this time. We're gonna have to wait till next winter.

--- Implementation and ongoing support ---

LAUREN

1:31:33 Yeah.

CLINT

1:31:34 I try to train on the tracks.

LAUREN

1:31:36 Yeah. I'm... I'm looking at our service windows right now, the... the first available for a company your size would be October fifteenth and I think that's way too soon considering the work we need to do. Yeah. And... and if Katie, you're going to be out, I think revisiting and December we'll by that point, our service window... won't be able to start until if I'm guessing we're usually about six to eight weeks out. I think probably the soonest would be February to start your implementation if we.

KATIE

1:32:13 That's actually what we were trying to shoot for that. But how long does implementation, yeah, taking.

LAUREN

1:32:19 Yeah. About eight to 12 weeks.

--- Purchase decision ---

KATIE

1:32:22 Shit though the punches us... I mean.

LAUREN

1:32:27 You're not if you're going out in November. I think that still gives us a month to... to fit your things out because here's what I see as next steps. I CS kinda sending you some resources so you can kinda talk off line about your feelings about things. I'm not to sound like therapists, but whatever... yeah, talk about your feelings, kind of meet... meet with me with Jeremy and kinda... kinda tort take a tour of how they're doing things on a day to day. We'll schedule some time with our... our team and kind of answer some of the accounting specific questions related to spectrum and parts purchasing talk with... with another reference. Jamie. So I think we can accomplish these things and... and a timeframe that potentially we could... we could

do. You think it's... it's outlandish to... to be thinking that you guys can make a decision before Katie goes out.

KATIE

1:33:31 I'd have to talk to... to other people.

--- Purchase decision ends ---

KATIE

1:33:34 I don't think so because it's another, what we're going to have to do it. But one of the guys who also happens to be the president of the company is one of the guys it's involved in the service department. And he's someone who's really putting the onus on us. But he's also probably the biggest one to pump the brakes on moving too quickly. So often talk with him. My God.

LAUREN

1:34:01 Okay. I was wondering if I knew him.

KATIE

1:34:06 I know Jeremy is there might go to get help with how involved is James with this?

LAUREN

1:34:12 They're they're equally as involved.

KATIE

1:34:14 Okay. Alright. Because that's that was the other thing we wanted to get up there and see how they're actually doing it. I mean, basically making it work so that we can pick up on that. Because we're again, we're... we're... we're the same company until just 15 years ago when we decided that we had to part ways because the market was look different if they're in here, but we still have some of the same practice on how we operate. They've just been quicker to adapt. So, my... my fear was because we are still in the dark ages, they wouldn't be a huge step for us. Works for them as a baby step because they're already halfway there.

LAUREN

1:34:49 Hey, I'm Clint, stop sharing for a minute. I'm going to show them think... this is this stupid, but I want to show you regardless, not my dog.

KATIE

1:35:02 Crazy.

LAUREN

1:35:03 Yeah, you've got a blue item and brown, I... I send this to Jeremy and James literally back in July because I live in Huntington Beach.

KATIE

1:35:12 You saw one of our trucks like down here?

LAUREN

1:35:15 My God. Yes. So I sent this to him and I... I got so excited and I was like, wait, what and I would saving things like, no, no, no, that's not us. But yeah, I sent it to each of them because I, because... because I've worked with them pretty consistently... but, yeah, so.

KATIE

1:35:35 No, that's cool. Yeah, the... the fact that they've already done. And again, the idea was even when they were on the spectrum service module was to let them figure out all the speed bumps. And then we come in and take over our side of it after. But now that they change it's like, okay, let's wait to make sure they get this, figure it out. I think for us to jump in and all of a sudden they change the type of candidate, not where like okay script. We're sticking with this, but it sounds like everything they've told me is this is leaps and bounds above what they had. So I think we're ready to go. It's just a matter of convincing Mike that we're going to pull the trigger and make it happen. Yeah.

LAUREN

1:36:07 Well, they, your cohorts to the north signed a three year deal with us. So there, there are certain.

KATIE

1:36:14 He told me they're good and they were gonna find a way to make because he said that he was sold price with the software. That same thing. It didn't mind. They're gonna find a way to make it work with accounting because they realize the value of what you guys have to offer. I mean, we looked at a couple of others. They all seem pretty promising and it sounds like, I mean, not too much things that they might have migrated into spectrum a little bit better, but this does everything that they do and we can make it work. I mean, I don't see why we wouldn't do it on the dashboard.

--- Quoting ---

KATIE

1:36:46 Is there a way to organize the customers? Like behind the salesperson? Yeah. Okay. Because we have different, you know, different salespeople handle different customers. And if we can set up that salesperson's dashboard to Jesse, that's after their customers can be beneficial?

LAUREN

1:37:11 Yeah, you can certainly do that. Yeah.

--- Quoting ends ---

KATIE

1:37:17 Okay. If I, if I'm seeing this correctly, this is pretty much takes the girls out of spectrum for everything except for the last little steps of migrating... job numbers and costs material. Okay? I'm sorry.

LAUREN

1:37:35 Hello, is that the sales team?

KATIE

1:37:38 Office there were still very hot here, office professionals. I'm sorry?

LAUREN

1:37:44 No, that's okay. No, I always say that as the gals in the office and most of the time it's true.

KATIE

1:37:52 Some people take offense to that. No, no.

LAUREN

1:37:54 I know... I know. I was just telling Clint yesterday, I use the word guys is gender neutral and some people don't agree with that.

KATIE

1:38:05 Yeah. And we... we still use four letter words like we shouldn't be there. So if you hear.

CLINT

1:38:11 Well, that's it that's the industry.

KATIE

1:38:14 Yeah, exactly. Work construction company.

CLINT

1:38:16 Good, good luck fixing that.

LAUREN

1:38:19 I don't know what you're talking about now.

KATIE

1:38:23 So, I think, if... if possible, I mean, I want her to be able to kinda wants to be, she, she's... she's been doing that with some of the other to be seen, some tutorials

that you can find out a way to get the link or something that she can certainly get into that.

--- Implementation and ongoing support ---

LAUREN

1:38:36 Yeah.

KATIE

1:38:39 Seems to find out when we can get up there.

LAUREN

1:38:41 Okay. I will... Katie, you're gonna get an email separate from the recap that Clint and I will send from something called sync ethic, it will give you access to log into our actual training courses so you can kinda see basically the training that your team would go through and during the implementation process and it's a great introduction to the application.

--- Implementation and ongoing support ends ---

LAUREN

1:39:07 So I'll get you set up with those. Yeah. Yeah. So what we'll do in the... in the followup email is send you some resources that might put some preliminary pricing together. Just so you have like an idea. Did you say what your budget was? By the way?

KATIE

1:39:25 Well, we don't have one yet because we don't know what we're looking at.

LAUREN

1:39:28 Okay. Alright, fair enough. We'll find that out if you can, but we'll put some... put some preliminary pricing together, send a few resources, the search and then you guys can get with Jeremy up at nor... nor Cal and the Jamie down in San Diego, and then we'll send some times for us to regroup with Patrick. Does that sound good?

--- Pricing ---

KATIE

1:39:50 Yeah. So if you throw some numbers to just the 119 to 159 protect based on wherever level we go with, is there like an implementation fee for migrating everything too or is that included in the first year or how does that work?

LAUREN

1:40:00 There is the implementation, I would guess would be between like 15 to 25 percent of whatever... whatever the subscription prices, I'll run some numbers?

KATIE

1:40:12 Number of customers already that it's just.

LAUREN

1:40:15 Yeah. If... if it's a flat fee, what it is, how many technicians do you have? Again? Is it?

KATIE

1:40:22 Company one? Hang on.

LAUREN

1:40:26 Right. I know we have a services price increase coming next month, but I don't know what it is. So I'll try to estimate as best I can... and then we'll include that in a follow up just so you have an idea.

--- Pricing ends ---

KATIE

1:40:42 And then...

LAUREN

1:40:43 Let us know what time would work for a follow up meeting with Patrick will send a few times over. And then once we... once we reconnect, we'll get your feedback from and observations from your time with Jeremy, your conversation with Jamie get maybe, would you want to pull your accounting team in on our next call to talk about spectrum?

--- Purchase decision ---

KATIE

1:41:02 We'd prefer not that we prefer to figure it out. Okay?

LAUREN

1:41:07 Okay. That's fair. Do you feel you have a strong enough understanding of some of the processes? It sounds like you do, but to... to make those decisions?
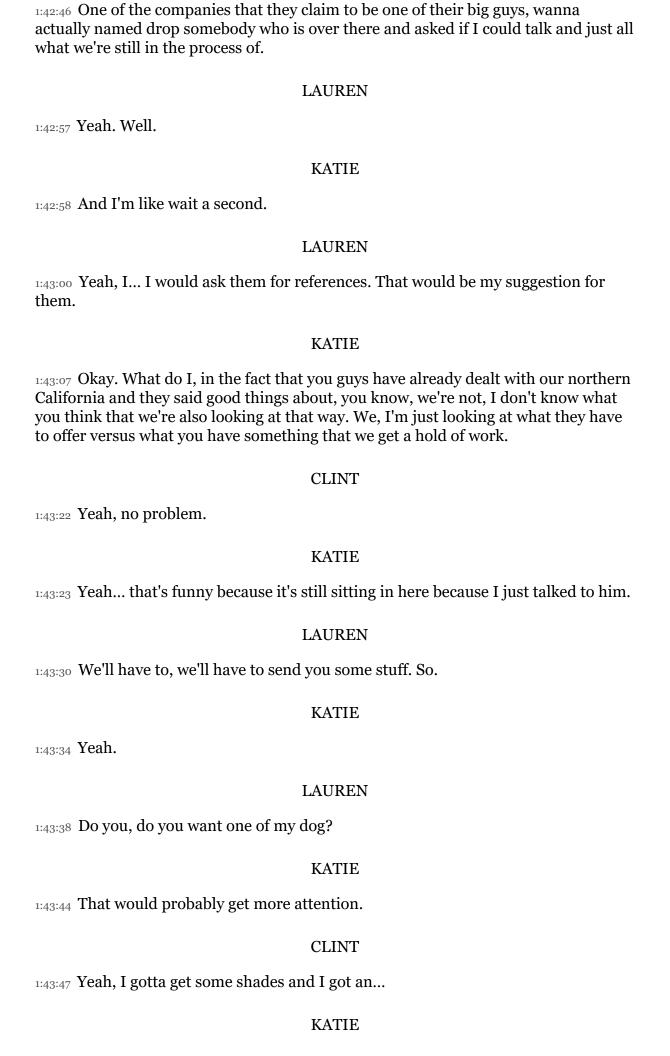
KATIE

1:41:17 Some of them, okay? Because it's not just changing the way that we do things working with a much older demographic.

--- Purchase decision ends ---

KATIE

1:41:28 Does it? I mean, I understand fully heightens the computer, so... excel and insights, it's more than just. And this is how we're gonna do it. Now. It's the small potatoes kind of leave that to everything that wants to go into one. Once we jump into this. There is, so his way in our rate, it's going to have to be one way. It's all gonna have to be in service trade.

LAUREN

1:41:55 Yup. Yup.

CLINT

1:41:57 Todd saying that if you don't mind, could you tell me that other company look at that? You said that?

KATIE

1:42:04 The next highest on our business BuildOps?

CLINT

1:42:07 Filled up filled out so.

KATIE

1:42:09 And they heard of you guys and they knew that you were comparable and they gave us some of your negatives that I sent up to northern California guidance and how to do deal with businesses smoking?

LAUREN

1:42:20 Okay. Do you want to hear the negatives I've heard about BuildOps?

KATIE

1:42:24 That's cool.

LAUREN

1:42:26 I've heard they don't exist.

KATIE

1:42:29 Really?

LAUREN

1:42:30 I've heard that whatever they're selling still hasn't been brought to market. I don't know. I haven't talked to anybody that actually uses them. I've talked to people that have invested in them, but I've never talked to anybody that's actually using BuildOps? So, my...

KATIE

1:42:46 One of the companies that they claim to be one of their big guys, wanna actually named drop somebody who is over there and asked if I could talk and just all what we're still in the process of.

LAUREN

1:42:57 Yeah. Well.

KATIE

1:42:58 And I'm like wait a second.

LAUREN

1:43:00 Yeah, I... I would ask them for references. That would be my suggestion for them.

KATIE

1:43:07 Okay. What do I, in the fact that you guys have already dealt with our northern California and they said good things about, you know, we're not, I don't know what you think that we're also looking at that way. We, I'm just looking at what they have to offer versus what you have something that we get a hold of work.

CLINT

1:43:22 Yeah, no problem.

KATIE

1:43:23 Yeah... that's funny because it's still sitting in here because I just talked to him.

LAUREN

1:43:30 We'll have to, we'll have to send you some stuff. So.

KATIE

1:43:34 Yeah.

LAUREN

1:43:38 Do you, do you want one of my dog?

KATIE

1:43:44 That would probably get more attention.

CLINT

1:43:47 Yeah, I gotta get some shades and I got an...

KATIE

1:43:50 Yes. Okay. Alright. Goes... we actually Scott have a sidebar thing, you know, the 13 guys and Afghanistan that just tragically guide there was one of the guys localize it a corona and... and one of them moved in norco, and last Friday, they had his... his whole procession coming from ontario report back down on through norco. And it's almost impossible talking about mean there was, I've never seen so much patriotism amongst people in the... in the, can you hear that was literally thousands of people on every passive flags and everything. And all long six street and the fire department have their... their trucks with their latter reads out the American flags and water shooting. It was awesome man.

CLINT

1:44:32 That's awesome for sure. That's that is also, I didn't know one of the guys was local up here because I'm down in san Clemente?

KATIE

1:44:38 Yeah.

CLINT

1:44:39 So, a little bit of ways, but my father in law used to run a business on corona career boats. I don't know if you've ever heard.

KATIE

1:44:44 Yeah. Yeah.

CLINT

1:44:46 Yeah. So, Dennis, that's my father-in-law he started.

KATIE

1:44:50 So, the people he managed to build their, he... he, at least the building from the property managers. We did the work at the curb facility right there, corona?

CLINT

1:44:56 Did you really?

KATIE

1:44:57 Yeah.

CLINT

1:44:58 He ended up having like three or four offices because the business exploded say kept having to move into bigger buildings.

KATIE

1:45:04 Yeah.

CLINT

1:45:05 That's pretty funny. Small world.

KATIE

1:45:07 Yep. Okay. Cool. So then I'll get with you guys at north, figure out what can be with them. I guess just stay in touch with Katie and she can kind of figure out some of the things with accounting. Everybody else will need the prices don't Patrick at some point and go from?

LAUREN

1:45:20 I'm looking at the calendar for next week next Friday. The first, would you guys be free on Friday at nine 30 to meet with Patrick and our accounting team?

KATIE

1:45:30 Every Friday morning, we have our service management meeting, so that's happening 10.

LAUREN

1:45:35 Bummer. Okay. What about eight 30?

KATIE

1:45:40 Yeah. If we wanted to earlier, we can help him. Does he need, do you think?

LAUREN

1:45:43 Probably between 30 to 45 minutes.

KATIE

1:45:46 Yeah. As long as we were out by 10.

LAUREN

1:45:49 Yeah, I'll... I'll go ahead and block my calendar and get the right people on the invite from my... my side of things and send you an invite just so we've got something already scheduled.

LAUREN

1:46:02 Might as well while the calendar still open rate.

KATIE

1:46:04 Yeah, exactly. That's the first one.

LAUREN

1:46:09 That's right. Yeah. Can you guys remind me of your email addresses? Because I'm not looking at them?

KATIE

1:46:16 Okay. Run at W a, so Cal.

LAUREN

1:46:22 Okay.

KATIE

1:46:23 And team, you, can you see H a M and a WS? Okay?

--- Dispatch ---

LAUREN

1:46:31 Okay. I got it.

KATIE

1:46:34 Yeah.

LAUREN

1:46:45 Are you guys going to msci?

KATIE

1:46:47 So, let's just holler, unfortunately, I have to go to the international Foundation thing because I'm interested in that conflict this year, so I don't get it.

LAUREN

1:46:53 Hello... good. Think Jamie is going to Emma CA because I asked or I'll be there.

KATIE

1:46:59 He might be having to go to, I have also in Denver. And actually, if she's there, I'll call her. She said I'll... I'll talk with her about it.

--- Dispatch ends ---

LAUREN

1:47:05 I'm not even the ally to you and said, hey, are you going to MSDN? She's like I'm trying to stop being as involved in stuff. I'm... I'm kinda tapped out.

KATIE

1:47:14 Yeah, I'd say Sherry put it in our time. She did the whole sure. Awesome.

LAUREN

1:47:19 Yeah, yeah.

KATIE

1:47:20 But she's cool people. I'd like to.

LAUREN

1:47:22 I do too. And she, yeah, she's great. I swear, we don't pay or I promise.

KATIE

1:47:30 Way, if... if she's on board that I know because she's hard to work with to, from what I've heard from other contractors. So, if you guys have got to convince them, that says a lot about you guys, okay?

LAUREN

1:47:41 Thank you will call before we go. What was your favorite part of today?

KATIE

1:47:48 For me, it's just one step closer. We've... we've been needing to do this for a long time in the fact that it's actually coming to fruition, I think is... is promising for us because it, it's... what are they all want to tell you guys too? So, my dog or the president he's... he's always taken pride in the fact that the guys that we have with us have been with us forever. I mean, we've got guys are starting to friendship and finished our retirement with us. Things that we're really flexible on is because our guys got such a good relationship with our customers and because we kind of have allow them to be flex well with their hours. He's concerned that this is gonna take some of that flexibility away from those guys kinda upset the field.

--- Tech time tracking ---

KATIE

1:48:30 And Katie and I have like from on the census look, it is what it is you come in and just having to leave at this time. But he tries to allow that flexibility of okay, if you have a deal worked out with the customer, you're gonna take Friday off with that. Let's work longer days during the week from Monday through Thursday or even somehow build extra hour here. There. These are phrases might take away from them which is going to create problems with them. And I know there's really no way around that, but I don't know that's why turn that timestamped thing off? And if the guys put it in an extra hours, it doesn't show on the customer side, they can still get away with it.

LAUREN

1:49:01 Yeah.

KATIE

1:49:02 Approach, but it does happen, the guys tend to build a little bit more drive time wasn't really an hour but they build an hour type of thing.

--- Tech time tracking ends ---

LAUREN

1:49:08 Yeah. Yeah. I mean, all that is... is stuff that you can decide what is relevant and what, how you want to manage it. So, yeah. What about you?

KATIE

1:49:20 I liked the proposal part of that. We can kinda one central spot for all the proposals to live, that will be eligible and building it straight from the platform and send it to the customer that I've been doing external?

LAUREN

1:49:36 Yeah.

KATIE

1:49:40 So, another question that was all done like a job. What about meetings? Do you guys have anything for building a maintenance agreement or is that done externally?

LAUREN

1:49:49 What do you mean like... like... like the sales team, what they would put together for a maintenance?

KATIE

1:49:54 Well, we have, our... our sales team is the area managers. We do everything cradle to grave. We don't have guys and just sell, they sell run close Bill everything. So the maintenance, we have a completely separate form that we use, but I don't know if we're going to continue using that or if there's something that you guys have, it helps us build that maintenance proposal and send it to the customer.

LAUREN

1:50:16 Can you send us that?

KATIE

1:50:20 Yeah.

LAUREN

1:50:21 I'd like to look at that, and then once I see how you're doing it now, then maybe we can advise if that's something better done through service trade or something externally.

KATIE

1:50:31 It's so it's a, it's an excel spreadsheet that somebody built years and... years and years ago... how it works and we figure the frequency and it calculates struck charges. It calculates markup on filters and belts and why don't you buy whatever? Then it spits out a number at the bottom the spreadsheet. So we'll probably sounds like.

LAUREN

1:50:51 Yeah, I, that's probably the better way to do it. We want... we want to build that into service trade. Eventually, the problem is not a single one of our customers can agree on how it should be done. So we've just kinda throw in our hands up and said, if you guys are happy with how you're doing it and just keep doing it that way.

KATIE

1:51:07 Yeah... that's probably that's easiest for us.

LAUREN

1:51:12 Yeah, but.

KATIE

1:51:13 The, the whole thing, I mean on what BuildOps propose and what you guys are proposing is real similar in the sense that everything's handled within your system. You don't have to do anything external, which is nice... separate. Sounds like the po, is we're going to have to be done externally? Yeah. Yeah. Okay. And I, hopefully something Patrick and above.

LAUREN

1:51:35 Yeah. Yeah. We'll talk with Patrick. I just invited like for other people to that meeting too. So we'll get there.

KATIE

1:51:43 Okay. That's just make sure they know we gotta get all the attendees. We got a commitment. We have to be an...

LAUREN

1:51:47 Yeah, I think... I think we'll be all set.

KATIE

1:51:50 Okay. Cool. Sounds good. Yep. Yep. Yep. Thank you.

CLINT

1:51:54 Thank you guys. Nice meeting you.

KATIE

1:51:56 We should take care.

CLINT

1:51:58 Yeah.

The End