NorthBoundary Demo with ElitAire

Susan Warren with ElitAire
Recorded on 4/13/23 via Zoom, 1 hour 2 min.

Participants

ServiceTrade

Susan Warren
Territory Manager

Pam Ann Morgan

ElitAire

Patrick Carr
Manager, Operations

Tarah Smith
POC #1 Account Executive

Christian Holden
Partner

Other

15136236412

Ezra Vonnegut-Gabovitch

Topics

Transcript

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SUSAN

0:00 Good afternoon. How's every doing?

TARAH

0:03 Good. How are you?

SUSAN

0:05 Good, good. If anybody's got cameras, I'd love to put faces to names if not no pressure... but yeah, I just wanna kinda jump off. I know some folks are kinda joining. We're still here early, but just for the hello?

TARAH

0:24 Yeah.

SUSAN

0:26 Nice to see you. So, yeah. So my name's Susan and this is Pam. I'm a territory manager here at service trade and Pam is a fantastic resource that is super knowledgeable about all things related to Northboundary, so, we'll just be here kinda go in the conversation addressing whatever questions that you guys have. And Ezra, what, what's your role? Okay?

PATRICK

0:59 I...

EZRA

1:00 Yeah. Sorry, I'll show my face for a second. I'm the controller here at a lead here, just kinda chiming in just to hear what you guys have got and just kinda in the background just to learn more about it.

SUSAN

1:11 Sounds good. All right. Hello, Pat?

PATRICK

1:19 How are you?

SUSAN

1:20 I'm good. Are you, tell me what your role is? I don't want to put any words in your mouth.

PATRICK

1:28 District service manager here in Cincinnati. So, terra counterpart just different districts.

SUSAN

1:33 Very good.

SUSAN

1:39 And Christian.

CHRISTIAN

1:42 Yes.

SUSAN

1:43 Hello? What's your role?

PATRICK

1:46 Hi, Amy?

CHRISTIAN

1:47 Chile... I am, I'm one of the owners of the lead here and I've been working with Pat and Tarah for a little bit, identifying some, the right software solution for us. So, and the guy you see right in the back of terra there that's Andy, he's moving role of running the, our service group. So I'm not a I'm a CRM novice. So, what you're going to show me? I think terra, hoping that to help us understand what's important.

--- *Purchase decision* ---

SUSAN

2:30 Absolutely. Sounds good.

SUSAN

2:37 Well, first off just kinda wanna level set, you know, in terms of kind of where you got where everyone's at? Is everyone have like a clear understanding in terms of, you know, what we're looking at overall? Like, you know, I'm happy to kinda go through like a quick overview of the tool in terms of, you know, it's basic level functionality. I just wanna know like how much word is kinda spread across the organization because I don't wanna go over information you'll already have or, you know, you guys tell me what would be the most valuable if we want to directly answer questions. If you need a, you know, a short overview first, you know, for folks that might be catching up, you'll tell me.

--- Purchase decision ends ---

CHRISTIAN

3:17 You're muted, Tarah.

TARAH

3:19 Sorry. So the last time that we met was just Pat and I who got to see the demo that forget the general say we put that on for. So everybody else here would like to see something similar only maybe in a, on a smaller scale, not the full demo.

--- Purchase decision ---

TARAH

3:35 We'd like to save some time specifically for Q and a, making sure that everybody who's here has the chance to ask those questions. So if there's a way for you to show us just some of the basic functionality of accounts list, how you guys store information within those accounts and opportunities where you're creating your proposals or your estimates from the proposal generation, and then briefly touch on the asset management that would be really helpful. Does that realistic to do in like a 15, 20 minute time frame?

SUSAN

4:05 Yeah, I can, we'll keep it super high level if that's cool. So, Pam, what I'm thinking is I can go through the vines and, you know, as you guys just, I will just talk add in fan items. So if at any point you guys have any questions, I want this to be a conversation please, you're never interrupting me, please stop me. But yeah, and we can go through that as we have questions, we can take that. And then a full disclosure payment is going to be your more technical expert on that in terms of just like what am I signing up for now? She'll be able to answer a lot more of the detailed kinda ready for lack of a better word questions.

--- Type of work ---

SUSAN

4:48 But I'll be happy to go over the high level overview. And I can certainly help, you know, talking, you know, pricing next steps, all that good stuff.

CHRISTIAN

4:54 Susan, one question I have is, do you have customers who are hvac equipment reps or is this geared more specifically to the hvac service?

SUSAN

5:09 So, yeah, both.

PAM

5:12 Service and maintenance and projects and maintenance, both.

TARAH

5:16 Not new equipment sales though that, that's the clarifier that he's asking for.

PAM

5:21 New equipment sales could be under projects. And then there's another section called maintenance.

CHRISTIAN

5:26 Okay.

PAM

5:27 We do both.

TARAH

5:28 See what that looks like.

CHRISTIAN

5:30 So for me, I don't need to know exactly everything about the tool.

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

CHRISTIAN

5:35 What I really like to see is what patent terra deem as powerful because they both have spoken highly about the demo they saw. So I'd like to understand what that looks like specifically learning how to use the tool that's not really.

PAM

5:55 Do you do both or one or the other?

CHRISTIAN

5:58 We do both. And so our service group patent terror will have... short order, six sales folks on. But we have probably 25 sales folks who do other things besides service in our organization. And when we do, when we identify the CRM we want, we wouldn't wanna do it if it fits the service side appropriately, but doesn't necessarily make sense for the rest of our business. We want one tool. And we're not implementing this right now across our entire organization. The priority is certainly getting it into patent errors hands so their teams can use it.

PATRICK

6:44 Okay. Bye.

SUSAN

6:46 Good. And to clarify with this, you know, we kind of break this up into like three big sections, you know, there's setting up proposals for, you know, planned maintenance.

--- Type of work ---

SUSAN

6:57 And then, you know, there's also ones for kind a longer project like installations. Is that something else that you guys would be using that for, you know, the longer install projects as well? Or are we thinking more for selling equipment and then selling the maintenance agreements only? Yes.

TARAH

7:16 We do, we do what we call turnkey projects. It's not Construction in an Installation in a true Installation sense. But we do have projects where we're taking out one piece of equipment or multiple pieces of equipment and replacing them. So, I don't know if today we need to get into that. It's probably more beneficial to spend some time just regular like, you know, service and repair break fix type proposal. And then how that specifically is saved and housed within the tool. And then the maintenance estimating tool is of value to us, which is why I asked you the question about where your data was coming from yesterday. So thank you for answering that for us.

--- Type of work ends ---

SUSAN

7:55 So that was me relaying paste, not gonna take credit for that too, but yeah, that sounds good. So we'll focus mainly on that. And like I said, this is going to be super high level, really just a way to kind of begin the conversation. So I'll go ahead and share my screen... do this.

SUSAN

8:21 Here, I want to do presenter view.

SUSAN

8:28 That situated... then I need to minimize this.

SUSAN

8:39 Right? Screen share.

SUSAN

9:08 Nope. There we go. So yeah, should see grow your sales engine with did with a phone right now. Perfect for some reason. I accidentally clicked on presentation mode and that was my first time doing that and did not go well for me. All right. Thank you for your patience. But yeah, so just kind of a high level overview. So, you know, kind of the reason behind the creation of Northboundary and how folks get the most value out of it. You know, these are a lot of the challenges that folks are running into, you know, basically not, you know, being able to have, you know, not only the super skilled reps, being able to gather the information that's necessary for proposals, those proposals existing in silo places through word and excel and not having of visibility into sales pipeline. And then, you know, just missing small details that are affecting pricing and thus affecting margin. So that's you know, really the rational behind the creation of Northboundary. So, you know, in the creation of the tool, you've got your 30 plus years of, you know, expertise and all these templates that are, you know, super flexible that come in with all this industry knowledge that are gonna make sure that everything is getting in there. And then in terms of, you know, pipeline visibility and the visibility of the proposals themselves, just making sure that everyone who needs eyes on it can have eyes. And then, you know, our pipeline management tool that I'll be showing you a little bit about as well. And then, you know, making sure that we're being super detailed oriented that we're not missing out on any material cost, any component of the proposal that needs to be in there because we want to, you know, be able to capture that and get that margin from there.

--- Pricing ---

SUSAN

11:01 And, you know, just for example, one of our customers blue hat mechanical through using us was able to see a 50 percent growth and maintenance contracts. And the nice thing is they only increase their, you know, their tech count by about 10 to 20 percent to get there.

--- Assets ---

SUSAN

11:18 That's how robust that tool was for them. So, you know, like I said, the three main pieces there's the maintenance proposal piece. So, you know, there's in terms of the field, there's that OCR scanner that pulls into a model number library. And then it's that's is going to be able to automatically pull in the maintenance tasking and pricing and thus generating proposal with templates and an E signature function.

--- Assets ends ---

SUSAN

11:46 This piece. We're not gonna touch on quite as much. But this is more for those longer term projects that it's going to have that same functionality there. And you'll have, you know, worksheets. For all of that to keep that organized and stay on task with that. And then finally the sales monitoring piece, we'll get into that just pipeline management, sales based, you know, the reporting and you know, having office and division level over site as you grow with the tool.

--- Assets ---

SUSAN

12:15 So this is the mobile app. So this is where, you know, basically you have somebody going at there, really assessing the situation and the nice piece with that, you know, the all the stuff can be hand keyed in. However we do have the ability with the OCR scanner so you can go in and just scan that number like you're seeing right there.

--- Quote templates ---

SUSAN

12:38 And that's gonna pop in automatically. And so they don't have to spend a ton of time out in the field gathering intel if they're able to get something like that because that's gonna match over to templates back in the office view. But of course, you know, they could key in any of that information there. So all that would be right the here. And then, you know, once we have that that's going to come back over into the office view. And so you've got this is going to be your equipment model library, you know, as you saw as we mentioned before, you know, the library of those templates are going to be coming in through those sources we mentioned before, but those are highly editable. So you can make changes to those as need be. But it's gonna automate all of these components that you see here. So you can kinda see how we are just bringing in that template. So that's an option there. If you wanted to bring in something custom or you can do like we are doing in this screen where we are looking at based on model and generating the appropriate template based on that.

--- ST app contracts and pricing ---

SUSAN

13:44 So it's going to automatically populate. You know, the filters, the belts, all of that is gonna come in and of course basically just build out a full proposal of what labor needs to be done, what items need to be done in what months, you know, as you see here in the labor class section, you can have it set up so that a certain level of technician is doing more high level things for example, or, you know, perhaps a more of a helper or a printer could be doing lower level things like filter changes, things like that.

--- Quote templates ---

SUSAN

14:15 And so all of that is going to be right there. And then it's also going to do, you know, automatically do task based pricing. So you can see all of this is going to come through here and you can, you know, make small tweaks of this as needed. But that's going to be based on those templates... and then you can go in and you can over add any of this price as need be. But that's just a sample there. And we can kinda skip over this part because this is more about projects. Just know that that's a functionality. As you grow. You may want to consider that.

--- Quote templates ends ---

SUSAN

15:00 This is an estimate that can be generated from Northboundary, so you're going to have all of your items listed out here. Any alternates are listed there, and it's super easy to get an E signature. And then down here, this is our sales operations board. You know, something that, you know, me, you know, working in the sales field, like I get super frustrated with Salesforce all the time just because it's just, it's a lot and, you know, this board is really perfectly signed to be selling, you know, these maintenance contracts or, you know, these equipment pieces because it's just neatly organized into various buckets. So, you have, you know, when there is a sales opportunity, it's going to be listed out in there. The second it moves into proposal, you can just move that across. And then you'll have your sold area there. Anything that gets closed, lost as we say, is going to be in the lost category. And then there's also the ones that are completely dead. So you can kinda see here how those items can get moved through the drag and drop feature.

SUSAN

16:13 So, you know, different things are just moving to different categories. And of course, this is all going to have a robust reporting feature behind it. So you can see, you know, which folks are, you know, who are you losing the most deals to, you know, who are your most successful folks? All of that is going to be right there. That's going to help out with pipeline management. And then here's your main sales dashboard. So if it's got all of your opportunities listed out and depending on which stage they're in and then by amount. And then you can also drill down and see, you know, how each technician is, our salesperson is performing based all of these different things. And then you can also track your prospecting activity through the tool. So, you know, dials emails, surveys, etcetera... and this is just sort of a live action view of all of that. So you can kinda go through and see all the different ways you can change that. Those views over. You can go piece by individual sales people. And then you can also change the view here... by doing that. And then there's another way you can change who's seeing what. And if you get to the place where you're doing this for multiple offices, multiple divisions, that's just how that would be organized.

SUSAN

17:46 Okay. It's no problem.

PAM

17:47 How can we?

CHRISTIAN

17:48 Get this? How do you guys get this data? Because we're looking at an ERP, Accumatica, we're probably going to go with... how do you guys support integration into ERP systems?

SUSAN

18:04 So I will say, you know, we are designed to work with service trade is, you know, the company that acquired Northboundary, and in terms of information going over seamlessly that's what we're designed for.

--- Accounting integrations ---

SUSAN

18:20 However there is the ability to export this information into a CSV file. And then you guys can kinda do whatever with it in terms of getting that into Accumatica. But, and that was just basically how it was designed to get information into service trade because of that partnership that's there. But do you wanna kinda touch on like exports and what that looks like into a little bit more depth?

--- Accounting ---

PAM

18:45 Yeah. You covered it. It's mostly geared toward linking with service trade, but you can do a CSV export for just about everything in there. And if you match it up, you can send it to wherever Accumatica looks like. It mostly does business and finance. So you're mostly wanting to export your numbers and then import it for like an invoicing type situation.

--- Accounting ends ---

CHRISTIAN

19:11 That's correct?

PAM

19:12 Okay. Yeah, Northboundary itself doesn't do invoicing what it does is it takes your, I've worked the last 10 years in Construction and recently just jumped industries from Construction as a female veteran license contractor over into software development. So, world of difference and I love it here. But mostly what you've got in your estimators is they've come up on their tools. They were technicians first typically, and they're not skilled at the computer. Northboundary is gonna make them look skilled, look expert.

CHRISTIAN

19:46 And you said the technicians. So... how are the technicians using?

PAM

19:57 Go ahead.

SUSAN

19:58 Sorry, full disclosure. You know, I spend most of my time demoing service trade. So I just tend to default to saying technicians to anyone who's out in the field. And that is that's something I need to work on because a lot of times some folks, you know, do have their regular text out there, you know, doing these surveys, but then sometimes it's just dedicated salespeople. So I need to default to either saying something generic like folks or salespeople. So apologies for that.

--- Type of work ---

CHRISTIAN

20:24 Okay.

PAM

20:25 It's mostly sales people that are gonna use this app. So say you're bidding a government contract and you're going to do all the hvac service for this government contract. It's a one or three year contract. You've got to go out, walk the property, do a site inspection, instead of jotting down all the information for all these different units.

--- Access to information ---

PAM

20:44 You just walk up with the mobile app, scan it. And then when you get back to your office, you're going to go to do your proposal, you're not on excel spreadsheets anymore. You go to that mobile app piece. You go find what you scanned, grab them, import them.

--- Quote templates ---

PAM

20:58 And then it feeds them all into this maintenance contract proposal. I'm sorry, maintenance proposal for you is not quite a contract in the maintenance proposal. Once it's grabbed all these things. You've scanned in the templates that are already created, determined the labor hours for inspections for servicing, for coil, cleaning, for changing out filters, for changing out belts, pullies, anything you need.

--- ST app contracts and pricing ---

PAM

21:27 They are editable, some areas, they're very specific. No, we want our labor, you know, man hours and expected time frames to be this, not that you can go and change that. And it's determined for the tonage, you know, 20 ton units gonna take more time than a two ton unit. It's just the nature.

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

CHRISTIAN

21:45 I mean, I see the power in that. There's no question as I'm thinking through this, how's it going to flow? The, it appears it's very help people improve efficiency upfront, probably significantly. But at some point that has to go from the sales process to execution, that will move over into it needs to be in the accounting software and tracked as a project. So, to have two separate systems, we have to take that into consideration.

EZRA

22:18 Yeah, just to piggy back off Christian, and just to make sure I'm understanding correctly that there, there are open apis or any kind of API that can connect both Northboundary and in Accumatica, is that correct?

PAM

22:33 I don't believe. So at this time, there are API functionalities within Northboundary, you are more than welcome to build that out on your own.

--- Paper process ---

PAM

22:41 Some people do postman has been used to build out a API recently, the function between your technicians and your estimators. Once it becomes a contract, your estimators can print out a tasking sheet. And whether that's an excel spreadsheet or just a piece of paper, you know, we've had some offices that will print out the tasking sheet that the labor, our estimates are based on, and say, here technician, go do this.

--- Paper process ends ---

PAM

23:11 Then we've got the contract to go knock it out, check, you know, circle and slash all the way down. And when you're done come back in the office and give you your piece of paper. Now, as far as tracking any accounting for as far as their labor hours spent for what you're paying them Northboundary doesn't have that function.

CHRISTIAN

23:30 Thank you.

SUSAN

23:36 What other questions folks have? Or just general thoughts after seeing?

PATRICK

23:40 Awesome. So you have the capability to show the actual tool or is that kind of the presentation that you have available today?

SUSAN

23:49 Over to you, Pam... because I don't...

PAM

23:53 Give me a second. Let me log into like a test or account. Yeah, demo account. This is our play account.

PATRICK

24:00 Yeah.

SUSAN

24:01 Well, everything's demoed out of a park?

TARAH

24:04 Hey, Pam, would we get access to like a demo account? Like a Salesforce calls it a sandbox, do you guys have something like that we could play with?

PAM

24:12 I know service trade is, and...

SUSAN

24:14 We do not.

PAM

24:15 Does it not?

SUSAN

24:16 Not at the moment, but I don't know why I jumped in like with more authority... like, no, but I mean, I can only speak to the way service trade does sandbox accounts. You know, I have not received any authorization to do it for Northboundary, but generally we do sandboxes and they're limited, you know, pretty significantly time wise, like you would, you know, get access to it for like a week or two, but I am not sure either way if that's a possibility for Northboundary?

PAM

24:53 Do you guys see?

TARAH

24:53 Could ask for that?

SUSAN

24:56 Yeah, definitely.

PAM

24:57 I've already written that down if I ask it, if a customer asks for it totally different.

TARAH

25:03 And we would understand that it would be a limited time basis. It would just be nice to be with a drive.

PAM

25:10 So, do you guys see my screen?

PATRICK

25:12 Yeah, thank you.

PAM

25:13 Dark. Okay. So you've got some fund reports, you can build out whatever reports you want here. Opportunities. The API tool that does work at this time, say, if you do any kind of lead management or buy a bulk amount of leads in your area... you can import that Northboundary is really devoted to.

--- Type of work ---

PAM

25:36 If you do residential work. This works okay for it. It's very directed toward doing commercial work that's our main bread and butter customer is a commercial servicing, maintenance or projects, hvac customer. We've got customer management. You can load tons of customers any year with details to contacts. So, your customer is your company that you're working for, and then you have contacts within that company.

--- Quoting ---

TARAH

26:06 That is the reports one where you've got here, you can see like a quick glance at pipeline and things.

PAM

26:13 Opportunities, I believe. Yeah.

TARAH

26:17 Okay. There was a page that he showed us last time that was specifically for like sales management, where you could see everybody on your teams, pipeline and where they are in comparison to goal. Yeah, that looks like it's just on the dashboard. Okay?

--- Quoting ends ---

PAM

26:34 Dashboard is probably where that you were seeing, you can set goals for your team. You can set.

TARAH

26:40 I think we were in like a management view or something.

PAM

26:44 Yeah. You can set it to where if they sell so much, they get so much of a commission and it tracks what their commission base is and what their bonus out basis through here. And you can track it in real time. How far am I, how hard do I need to work? Have I made it there yet? You guys would mostly use this maintenance management tool… and that's where this gets. Let's see our good years are typical test one. I don't like that and it doesn't have very many assets in it. I want went with a few assets. It's a sparky brew house now.

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

PATRICK

27:21 I think they use the good year tool the last and, yeah.

PAM

27:27 There, so you're initially gonna set up your job. Some people love this factor. You got location pricing factors. So some people provide different prices based on your union hall membership. You know, your area determines on what your pricing is because your labor rates change per union hall, and that's district specific. So every job has a pricing factor that's where your labor rates are determined. It's you know, by district, it can be per customer. It could be by type of business. You know, your government contracts you're going to have may have different prevailing wage rates versus, you know, your Mike foods or coca cola.

--- *Access to information* ---

PAM

28:09 Your basic information goes in here, your assets go in here. So you could also view it in a grid view. And this is where all the information that comes in from that mobile app gets pulled in, right?

PATRICK

28:22 And they can be manually input as well correct the fee for mobile.

--- *Assets* ---

PAM

28:26 Do it manually of course. So if you want to pull in a new asset, you're gonna add new, pick an asset type. And some people up north, they've mentioned that, you know, they're more frequently have an hvac unit, but they have additional piece and an additional part like a humidifir, dhumidifier, something for certain weather issues.

--- *Quote templates* ---

PAM

28:52 I, and that's so common. But we didn't have a template for it. So we just pulled in an existing template, added that sub component and that's their new template that they use for their specific area. And we go over area specific stuff to get you up and go in during your implementation phase. So you would pick out all of these, all of these templates have pre existing items of tasking, the, you know, expected inspections that are going to go on which text you're gonna go to do each thing. Like Susan mentioned, you're going to have like an apprentice go and do your filter changes, maybe your belt changes, but you need that EPA certification to touch the gauges and the free on.

--- ST app contracts and pricing ---

PAM

29:34 So, you know, it'll default to your a tech labor class, but you can assign it to a helper, BC D tech. And then, you know, your a BC de, labor rates are determined again by that pricing factor on your first page. So all that's going to have it preloaded. What all these tasking features are, let's pick another one?

--- Accounting ---

TARAH

30:01 Hey, Pam.

PATRICK

30:02 Yeah. Where?

PAM

30:02 On?

EZRA

30:03 What question...

TARAH

30:04 For you regarding having? Let's say we've got a spreadsheet full of models and zero numbers and manufacturers and some data. If we have data that's in a repository, is it possible to map it to your database? So in one fair swoop we could populate a lot of information.

PAM

30:24 Are you wanting to do that per customer or globally for the company?

TARAH

30:28 And I have to see what that data set would look like. But the intent would be that we might have a spreadsheet that would have a lot of information could be customer addresses, contacts, assets. And if we have it organized in a certain way and we map it to your data fields in one swoop, we could suddenly create the database without it being as manual. So I just don't know that.

PAM

30:51 100 percent. So here, it's called importing exporting your CV, CSV files. So right here, you could import a CSV file for this customer for this proposal for this contract, just for assets right here. But any one of these functions over here, you could import a CSV file for opportunities customers contacts.

PAM

31:19 And then see, let's back out of here.

TARAH

31:23 So exporting a CSV file, then you would need to have it in a certain format. So on map correctly? Is that accurate?

PAM

31:29 Yeah. So the easiest thing honestly is to export something that's existing, literally go in and break it. You can't break it where one of us can't fix it. That's what we tell, people jump in and start messing with it when you sign on. So you would fill in some random information. So you kinda get a clue of what's up and down. When you export the CSV file, you have something filled in for kind of a breadcrumb and then you'll see what the data columns are and the titles and you can see, you know, what goes where... and then you just match up the titles. You don't have to mess with your data. Just take the column titles and match them to what you have. And then just go right back and import the CSV file right here.

TARAH

32:14 Got it. Okay. Thank you.

PAM

32:16 Yeah. Sure. So then you're gonna jump over as soon as you pick all your assets, you'll go to service pricing.

--- *Pricing* ---

PAM

32:22 It's gonna pull all these in for spring. You're going to have two point one hours, Summers point seven, nine hours, fall is one point five, eight hours. Winter is this many hours... a tex gonna have this many hours total for the contract. And then it also has different contract level.

--- *Quote templates* ---

PAM

32:42 So we have you're just gonna go out and Inspect maintenance contract. You're gonna go out, Inspect and replace belts and filters, nonmovable parts. You're gonna go out Inspect, replace nonmovable parts, movable parts. You're also ensuring to respect replace such as compressors or fan motors which get a little price here.

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

PAM

33:05 So of the contract gets higher, you know, and then there's another level. I've yet to see someone implement this. I'm told it's the fancy level contractor that does that. But they also will ensure the coils. So I guess just depending on the customer, depending on the contractor, I mean, I've found in my experience a lot of times if you're replacing coils, people want to buy a whole new unit because you get the warranty, you're gonna get a warranty with that.

--- Quote templates ---

PAM

33:34 But there's different levels of these contracts that the customer can choose. So you jump over here to your proposal, you pick out the pages you want to include. You go to hit, find your agreement, putting your pricing, you could make it user defined and, you know, load a preexisting shouting from your file or just go with the standard agreement that's pretty loaded in the system, go to print it.

--- Forms ---

PAM

34:04 These are all your pages that are gonna print. You can make different amalgamations of all these pages and different variations of this agreement. We work in the first few in the first month with you. We take what you have this existing and marry them together. So the data you input, pulls and feeds and pushes into these pages. So let's just go with our, you know, we're gonna test Inspect it's a lot smaller... full labor coverage, planned maintenance and full coverage. So then you print it. Well, scroll down and look at what it looks like. Yeah, we wanna save it. So you've got 17 pages and some customers, you know, it depends on who you're selling to.

--- Forms ends ---

PAM

34:55 If you're selling to an engineer, the more information, the better they'll dig into every single letter on all 17 pages. But if you're selling to a sales person, they wanna know the nuts and bolts and what's important and they wanna keep it. Moving. So it's got a, you know, here's your list of all the things we're gonna do while we're on your site here's your agreement.

--- Deficiencies ---

PAM

35:18 Next step I think is our terms and conditions, our inventory of the equipment. It mirrors that grid list but not all the details, any photos, air, filters, those are gonna come up to. This is really great because you can take a picture of how dirty their coils are and how dirty their system is and show that to them in their proposal.

--- Deficiencies ends ---

PAM

35:41 I found in my experience, a lot of people that are selling in hvac, I tell people, you know, when you're invoicing in Construction, the person paying the Bill usually has never looked at the problem. They've never looked at the project. They don't even see what happened. So, the more words you use to describe what you did, makes it easier for them to pay that invoice. And here, it uses all the words with all the things... so that's a brief. You know, this is what your proposal is gonna spit out and we'll work with you on what you want that agreement to look like... and help build that for you. I hope I'm not going too fast but a quick.

TARAH

36:23 This is one of the other things I remember from the demo. Speaking of like building as part of that onboarding process was some of those discussions around here's. What we have preloaded for like the hours for this based on like you said, you're based in that on like say, and some other entities that are national, but we can make those changes locally and it can, but it can live in the background so that our organization is set up in that way for the future.

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

PAM

36:50 Percent. Yeah, yeah, yeah.

TARAH

36:52 Where are you guys getting your pricing for? I couldn't tell if, when you were selecting filters and beds, if pricing was populating, or if that was just the functionality of this saying for this piece of equipment, you may want to add the cost of filters and.

--- *Parts management (inventory)* ---

PAM

37:07 100 percent. When we start out with you, we need you to give us price list. Okay? We assign you prices for your materials and parts that you're selling. We may have some stock pieces that we throw in there just to, you know, get you started, get you thinking in the right direction of how the tool works, but we're not gonna tell you what your selling price points are.

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

TARAH

37:27 That's...

PAM

37:27 Part of the discussion upfront. The only thing we have preloaded for your estimating is your expected hours of labor that you're proposing a, another fun tool. Susan, I don't know if you know this is the thing, but I want to highlight this and I think this is bigger than a lot of people realize, and it's not sold very much. So, planning this looks great if you go to.

SUSAN

37:49 Yes, the schedule is so key, absolutely.

PAM

37:53 Fabulous. So you put in your schedule of on this job, how many hours you're expecting these tech, you know, per hierarchy of the tech that you're sending out, how many hours that they're going to be utilized because it's feast or famine and Construction that's the nature of the business.

--- Recurring maintenance ---

PAM

38:13 You know, every summer every winter, depending on the division you're in a feast or famine. Here is this job right here. But down below, it is your entire company per month. So you can see that you're built out in April, January, July and October. So your next few maintenance contracts, you don't need to come out during these months, each one of these quarters, you need to start building out February and may and August and November because otherwise you're going to have a famine.

--- Recurring maintenance ends ---

PAM

38:47 You need to start building out your maintenance contracts outside of when you're visibility and busy season. Now that I have put in, I want that somewhere more obvious. Not within a job within a tab and another tab hidden over here in this little feature... that's an TAM, let's see our opportunity. This is where you can take notes and activity log. So you can keep track of what's going on with the customer. Customers love it when you remember things that happened in the last talk, you know, their kid on the softball game. You know, you mentioned that and they're like you care, you remember me.

--- ST app contracts and pricing ---

PAM

39:29 Yeah. And this is a condition assessment which not a lot of people use but it's an option just to explain the current condition and compare it to across the board nationally. And any of these are all of the different settings and things that you can change and alter to make it unique to you. So within maintenance management, if you wanna change your asset types and those individual templates for how many hours are expected for labor, it would be in here. And then that would be globally for the company for that type of asset. And you don't have to update that again.

--- Pricing ---

PAM

40:12 Every time you bid that one hvac unit, it's gonna come out with this. And it changes based on the sizing and the rating. So what do we have? 100 100,000 BTU furnace 150,200 1,000. And for, you know, these furnaces don't take a lot.

--- Pricing ends ---

PAM

40:33 You're pretty much looking at the ignite... and then the valve to feed the gas. And other than those two things, those things don't go out very often. So it doesn't take a lot of hours in timing, but it scales up with the higher B to us. Do you have any questions? I feel like I went off on a little while.

CHRISTIAN

40:54 So, guys, for me, I've seen enough. I mean, I understand the power of this. It is, it's...

TARAH

41:03 Extremely...

CHRISTIAN

41:04 Specific to our industry, which is great. I haven't seen anything yet that I don't know that we would roll this out to the sales, but to the new equipment sales, I see this as being more of a service maintenance selling tool. The question we have to ask is at what point could we... well, we just have to do internal discussions because at some point the job, once it's sold, it has to live inside of our ERP. And there's a lot of power in this tool looks like that you would almost wanna manage through this tool. But that means you're managing through here, you're going to be moving numbers one way or the other over to the ERP system?

SUSAN

42:02 Yeah. Let me ask you this though because we discussed this me and tried the other day, is there in light of the time savings and, you know, potential data integrity going on? Is there any chance that there be a willingness to have a subset of the business use service trade for the actual execution of these maintenance contracts? Because that's what we're designed to integrate with.

CHRISTIAN

42:31 I think... I would... ask you to clarify a little, but I think if you're saying the short answer would be all our business needs to run through one ERP.

SUSAN

42:46 Okay.

CHRISTIAN

42:47 So, the accounting part of the business, the revenue... that all, we would not want to deal with multiple systems.

SUSAN

42:57 I completely understand that because like the flow that has the least that has the most congruent pieces for lack of a better term would be to use Northboundary for what Northboundary is used for.

--- Invoicing ---

SUSAN

43:14 And then once those agreements are fully sold and signed, get the customer information, the asset information, the service information, port that into service trade, use service trade to actually perform those plan maintenances. You know, do all of the rest of your service work through there? And then, you know, a tool like for example, we have a seamless integration with Quickbooks for accounting, sending the invoice into Quickbooks.

--- Invoicing ends ---

SUSAN

43:39 So I mean, ultimately, that's a thought process for all to have on your end because I know that this is a larger organization and, you know, there's trade offs with both options. So if you do need to stick with Accumatica, you know, unfortunately at the moment, unless acumatica has, you know, a team that could help with API portions of this, you know, that would be that manual import export of information into acumatica. Just because, you know, we've got, you know, almost like it's like, you know, apple versus, you know, android kind of things for lack of a better comparison.

CHRISTIAN

44:18 Yeah, I understand. I don't know that. I... mean, you guys, your business model, I don't know that I agree if you want to expand Northboundary and people use Oracle, people use Sage, people use, you know, you're kinda limiting yourself to service trade. But the Accumatica integrator said he has a solution. We don't know what it is yet. So then we will talk to him more about that and see what that solution is. And then Pat, Tarah and Andy, I think we would want to with Ezra and say, what would it actually look like? And just so you know, guys Ezra who's on here, he's our controller. So he's leading our efforts for our ERP selection and what will ultimately become an implementation. So we have to figure out all right, we would use Northboundary up and to this point and that point is probably to the point of sale. And then you have to take all your costs and your POS yourself and move it into Accumatica and run the project from there.

PAM

45:31 Matica, do your tasking and your hours reporting for your technicians while onsite.

CHRISTIAN

45:39 No, it will, it is not our, right now. They do have a service module. We don't know that much about that. Yet we have to learn more about it. What we're looking at right now, the core accounting doesn't do that. I would venture to guess. The service module does some form of that. But I mean, what is it very impressive about this is, you know, we're hvac, it's a very small sliver of companies in the world. And the fact that you guys are so specific to what we do, it's there's a lot of power.

--- Accounting integrations ---

EZRA

46:15 And if I can chimein TAM and Susan, if there's any way that you can, you know, reach out to see if there are any other customers that use Northboundary that have, you know, some kind of integration or, you know, how they export, you know, their information to their accounting software, that would be great to look at. And if you could provide some of the reports that, you know, you were mentioning, that would feed into to the accounting software, that would be great for us to take a look at them and see what the fields are and what information we can get out of the system.

--- Accounting integrations ends ---

CHRISTIAN

46:53 How, how many customers? I love that idea as in fact, I'd like to build on it. How many customers do you have? Does Northboundary have?

PAM

47:03 I wish I knew that answer, right?

CHRISTIAN

47:05 Do you think it's hundreds, thousands?

PAM

47:08 I'd go in thousands and nationwide.

CHRISTIAN

47:12 Yeah. So not everybody's using service trade, right?

--- Accounting integrations ---

CHRISTIAN

47:17 So probably I would venture to guess a majority of the Northboundary customers are using something besides service trade and they're unless they're a very small company and using just using Quickbooks. I would say there's a pretty decent chunk of your customers that are using some other form of ERP and they have to get that information over.

--- Accounting integrations ends ---

PAM

47:40 If I could, your plinco effect here. So you're estimating before it comes to a job is Northboundary. Once it becomes a contract with comes to job, humor me for a minute, it would go into service trade would execute the job. And then after the job is complete and it needs to go to invoicing and accounting that's when your ERP is gonna take over, I would say give it a minute. Let Ezra circle back with a tech that you mentioned.

SUSAN

48:09 Yeah.

PAM

48:11 Let's Susan circle around with engineering within service trade because I have seen quite a bit that there is an engineering moment in time where they find, you know, what's common and what apis can talk to, who within all the ERP systems. And there's so many acronyms here. My head spinning coming into.

--- *Accounting integrations* ---

SUSAN

48:34 Cause the piece that's kinda be, you know, I think because in my experience with, you know, selling service trade is what I run into acumatica as a competitor because people are using that service module of acumatica using the RP functions and then using their accounting piece. So, I know, you know, for example, like ServiceTrade has the ability potentially to, you know, integrate with the accounting side because I know some folks, you know, run into some different challenges for that service module. But regardless of whether you use ServiceTrade or acumaticas service module, you know, there, there has to be something, there has to be a tool in the middle between Northboundary and accounting that actually works the jobs. So that would eight.

CHRISTIAN

49:21 Now we use our service tool is a alliance.

--- *Accounting integrations ends* ---

CHRISTIAN

49:26 We do not think we'll be on that forever. It's at a point in time we are going to evaluate going to something either the module within Accumatica or service trade or building ops or BuildOps, whatever it's called. We will do that evaluation separately. It's still the, in the question is always going to land Accumatica as our core business tool. We have to have flow in and out of that.

SUSAN

49:55 Exactly. Yeah. And we've certainly help. Like I said, it looks like it's just a matter of, yeah, you've got three decisions to make, you know, who is Northboundary going to be your tool for generating and selling proposals? Who's going to be your service tool? Who's gonna do accounting? But, you know, because there's that middle piece in between, there's no way to integrate Northboundary directly into accounting.

CHRISTIAN

50:26 Yeah.

EZRA

50:26 I'm...

CHRISTIAN

50:27 Like your plan of let us do our due diligence with our Accumatica consultant. And then Susan, if you could ping, I'm sure your engineers have been asked this question a 1,000 times. So there is a solution. We just would want to feel good about it of how that would work. And since we're not experts in the it field, you know, we're lay people when it comes to this to help us understand how that works. And then Ezra, what I would say is we need to understand, I guess define almost like a scope of work. We're talking in generalities right now, what is it that we're looking to actually come over? The one thing that I saw was they have pretty powerful dashboarding capabilities. Well, so does Accumatica. So like where do we start? Where do we end? When a sales manager wants to review their teams pipeline.

SUSAN

51:29 I think that makes sense. And just to be clear in terms of the, like I said, like there's no one that's having Northboundary talk directly to accounting, but you're looking for like examples of folks that are using a different field service management tool outside of service trade to see how that connects.

PATRICK

51:48 Yeah. And ideally, if there's...

EZRA

51:49 Someone out there that actually uses alliance or in the, so that would be perfect.

SUSAN

51:56 I'll definitely ask about that. I'm not sure if that specific one will be a possibility, but I can certainly gather intel on generally what it looks like to use Northboundary, and then a different F SM for running the jobs.

CHRISTIAN

52:10 So what this would look like right now is we would do the sales process and you would do all the work through Northboundary. And then when it becomes a job, it is, would likely have to be manually input into Accumatica.

TARAH

52:26 It would be booked though.

PATRICK

52:27 It...

TARAH

52:28 Would be booked, yeah, into Accumatica as our new alliance similar how it is today, great.

EZRA

52:34 Yeah.

TARAH

52:35 Salesforce, we lived in it to the point of sale, and then the booking documents were provided to our coordinators to put the financial information into?

PATRICK

52:43 To alliance? Yeah. Or Steve?

TARAH

52:46 So that will be what Accumatica is doing for us. Is that correct? Christian?

CHRISTIAN

52:51 Ezra, what are your thoughts?

EZRA

52:53 Yeah. Yeah. I'm kinda foreseeing that too is that it passes through alliance... and then we do our import from alliance into Accumatica.

CHRISTIAN

53:06 Turnkeys, turnkey projects, we will move out of alliance. That would, I would see going directly from Northboundary into Accumatica projects.

EZRA

53:20 Correct. And I think those would be, so, you know, it's not a huge volume.

--- *Accounting integrations* ---

EZRA

53:24 So I think we could use Accumatica, you know, use the CRM for a proposal and estimation and then input it into acumatica manually or with the CSV file to get it into the accounting system.

TARAH

53:43 Been speaking while we're on projects, would you guys show us just quickly with that demo screen and what the projects page was to build? We saw the...

--- Accounting integrations ends ---

TARAH

53:51 The...

TARAH

53:52 Project estimates.

SUSAN

53:55 That's something that's in the demo account that you have... she may have need to step... you're an, is that something the visibility in terms of, you know, because we didn't really cover actual projects, it was more for the service agreements. Is that something that's in your demo account that you could show?

TARAH

54:18 Hear me?

PAM

54:21 I'm muted. I'm sorry. Do you wanna see projects that's something I can show you? We didn't look at that, you.

TARAH

54:28 And then also while we're talking and you're pulling that up the pricing, we talked a little bit about the pricing. Would you mind going over that again for everyone?

--- Pricing ---

SUSAN

54:38 I can go over pricing while you get situated with projects. So basically... the base level package, the entry package would come with three sales users. And so that would be a base level of 35 64. And then every additional sales user would be an additional 99 dollars per month. Just also everything is billed annually. And then there is an onboarding fee of 1,400 dollars for the first three sales users. And in addition an additional 100 on top of that for the onboarding fee. Now, in terms of who can do what, you know, only because, you know, there is that office functionality that does come with it.

--- Pricing ends ---

SUSAN

55:27 Only sales users can be assigned to leads opportunities and proposals and only then they're the only ones that can, you know, build and send, you know, maintenance and project proposals and supporting documents. And then free users can support sales users for key activities like assets and like other data entry, that kind of thing.

TARAH

55:47 Can you send me that summary in an email Susan?

SUSAN

55:50 Absolutely.

TARAH

55:54 I couldn't keep up with you.

SUSAN

55:56 You're fine. As soon as I started this, I'm like I am saying like 17 numbers, and this will be so much easier to just say in an email. So I will happily do that.

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

PAM

56:07 Project management overview here as project management, there's also the survey manager. I believe that's the mobile app for you. There's an E sign function. There's job planner and a systems analysis functions. Also. So in project manager, we're gonna go pick our project. This one's already created. So let's back up if you create a new project up here, new opportunity customer lead maintenance, project system analysis, you're gonna pick your what type of market it's in, you know, put on all the things, all the details to get it going.

--- *Quote templates* ---

PAM

56:47 You'll start over here with a worksheet. Some people want to know immediately. How do I put in alternate pricing over here? You would add within the unit, right? There we go... you can add another unit to add alternate pricing. So within this proposal, this customer would get all right. This is where we're going to go and replace the entire unit, and also change a little bit of gutters or something, put you a new ladder up. And then this one isn't gonna include the ladder or the gutters changes because they look ugly and you want to replace and we love you and we're gonna throw that in, you know, so alternate pricing, you're gonna pick all your items... charge it out. You would set what mark ups and margins you want within your templates over here and your settings with all those different settings. And then come over here and it's you know, here's your overview. If you want to adjust anything, you can manually over here... but you should be able to adjust things here.

--- *Quote templates ends* ---

PAM

57:56 This is pretty cut and dry. The proposal. It's not as complicated. You have your cover page agreement. Some people do their own supplements, do photos, you print your proposal there's. Not as many options, maintenance. You have different levels of maintenance proposal. It's you know, this is the project.

--- Quote templates ---

PAM

58:16 They're different within the contract itself. So then you're gonna print it, yes, save it to the agreement. And here's your six pages. Hey, wonderful customer here's. Our proposal. And all you did was type, you know, pick your parts, typing your numbers if you wanted to change them from the stock numbers, provided, you know, assign an E signature here, exclusions.

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

PAM

58:40 This is what we're not gonna do here's. Your photos here's. Our terms and agreements, terms and conditions for agreement, pay scales. If you don't pay all the standard fund verbiage...

SUSAN

58:56 And real fast why you're kinda in between stuff, can you touch on like what signatures are like? Because, you know, it might not be easy to actually physically pull that up, but just, you know, in terms of the E signature functionality?

PAM

59:12 You're gonna sign the proposal over here, and then you can pick and drop which signatures you wanna put in or initials if you want them to initial each page. And so then save that request the signature and send it off to who you want to send it. And then they just get the, you know, the E sign. Does that work?

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

TARAH

59:42 Very good. Thank you.

PAM

59:43 Great.

--- Purchase decision ---

SUSAN

59:52 Any other questions while we've...

CHRISTIAN

59:54 I'm here.

PATRICK

59:58 Yeah, not for me. Thank you so much.

PAM

1:00:01 Okay.

SUSAN

1:00:01 Solely. Well, just real fast before we go, just want to recap the game plan. So I'm going to, well, payment. I'll take the action to do a little bit of digging of, you know, what things look like to, you know, when you're not using service trade, what those exports look like and just kinda give you a high level overview of those types of workflows in terms of how our customers are handling that. And of course, I'll be emailing pricing as well. And then, you know, in terms of, you know, yes, and kinda doing a little bit of digging on, you know, your side in terms of, you know, how things would be handled from the perspective and just, you know, high level overview of that... does it? I'm trying to think, you know, in terms of next steps we want to continue to communicate over group email, do we wanna set a follow up meeting? What makes the most sense for you all?

CHRISTIAN

1:00:58 So, for guys, from my standpoint after we hang up here, I'd like to get you guys on teams meeting, let's talk through this, but I think.

--- *Purchase decision ends* ---

TARAH

1:01:11 So I...

EZRA

1:01:11 Can...

TARAH

1:01:12 No next steps then if you want Christian?

CHRISTIAN

1:01:14 Yep.

SUSAN

1:01:15 Perfect. Awesome. Well, that sounds like a plan. Thank you all so much for hopping on with us today. We really appreciate it was great meeting everybody and I'm glad we got the full brain trust here. We'll take care of those action items and we'll be talking over email.

TARAH

1:01:32 Thanks lady.

CHRISTIAN

1:01:32 You guys.

EZRA

1:01:33 You Susan.

PATRICK

1:01:34 Thank you, man. Thank.

EZRA

1:01:35 You...

PAM

1:01:36 Okay. Bye bye.

The End