



# Brooke/Neysha Reconnect

Brooke Caskey with Industrial Door Company  
Recorded on 5/16/23 via Zoom, 54 min.

## Participants

### **SERVICE**TRADE

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*Territory Manager*

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### **OTHER**

Nlizasuin171352

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# Transcript

*"This English transcript was generated using Gong's speech-to-text technology"*

NLIZASUAIN171352

0:00 I just, I don't know... no, he did not. Okay. Sounds good. All right. Bye.

BROOKE

0:12 Hey, Lisa.

NLIZASUAIN171352

0:14 Here. Can you hear me?

BROOKE

0:16 I can hear you just fine. Can you hear us?

NLIZASUAIN171352

0:18 Okay. So I have Kari here. Hi, she'll be sitting in today.

BROOKE

0:25 Cool. Hey, Carey. Nice to hear from you again.

NLIZASUAIN171352

0:27 Nice to see.

BROOKE

0:28 You... are we waiting on anyone else on your side? Cool? Well, you guys know me, Brooke. But I brought along my boss, Jack here. Jack has been with service trade for a long time and he has a ton of knowledge about your industry and sort of the hurdles that companies that look like you go through. And at the end of the day, how they use software like service trade to become more successful with their client tell. So I thought to invite him to provide a fresh perspective on things and, you know, if there's any questions I don't know how to answer. He's definitely a helping hand as well, but we get started earlier.

--- Paper process ---

BROOKE

1:09 I, of course, was filling Jack in on kind of the background about industrial or and where we left things. And what I shared with him in Asia, is that back in January

when you and I initially started talking, you guys came to service trade really? Because your current process was a bit outdated and archaic and it was really difficult for you guys get from point A to point B, find important information such as service history for the technicians, and really just run, a sufficient operation on a day to day basis. Would you agree with that?

--- Paper process ends ---

NLIZASUAIN171352

1:41 Yeah, basically, yeah, other than the operating system just gonna crap pretty slow, but, yeah.

BROOKE

1:47 Yeah.

JACK

1:48 Sure.

BROOKE

1:50 So, I just wanted to make sure that we had a clear background for Jack. But if there's anything that nasa or car you wanted to share with him before we sort of get back into what's changed since a few months ago, anything you wanted to share with Jack or any background that I missed?

NLIZASUAIN171352

2:08 No, not much has changed other than we've gotten a few more glitches in our system in the last 12 months which just makes us feel like our operating system is just gonna like one day not wake up. We get in the system one day just won't reset. Yeah, that's like our current go to like you're not working. Let's reset everybody. But yeah, it's we've been getting a lot more glitches. So that's about the only thing that's changed. We've added employees to our group both in the field and in the office, but everything is pretty much stayed the same except we close the year we were able too though closing the year and adding all of our new employees. And we're still here. So now we're just trying to tighten everything back up with the new like processing system and kinda jump on that boat before we literally drown.

BROOKE

3:14 Okay. Because I remember when we were working together, I think March was sort of where you and I got really close to the finish line and forming a partnership. And I remember the big thing was that you felt like you were running out of time before things kinda went down the drain and you can use your current system. And then I know that you were tasked with training the new hires. And so I understand that caused you to be busy. But I guess when I say what has changed are you sort of in the position now where you guys are ready to select a software and make a move?

NLIZASUAIN171352

3:52 Well, we are. So that's where we're trying to kind of top off. But like I told you the other day, we had our sales rep, one of his clients brought in a new company kind of to the group because we had looked into Salesforce, we had looked into a couple of other companies Quickbooks, and we called them and got information and it was just kind of we didn't like where they were going and, or what they were doing. Some companies, we couldn't even set up a meeting time. So it's like we can't set up a meeting time for you guys, to pitch to us. How are we even going to get help from you? And we needed if we need it? But then one of our sales reps clients, he uses builders.

--- *Purchase decision* ---

NLIZASUAIN171352

4:40 So then last week, we were kind of just looking into that. That way we could have at least two options on the table to present to the owner and kind of we can, you know, compare and contrast that way. It's not, you know, we have, we just, we're choosing the best possible option for our company because our company, we are a door company.

--- *Paper process* ---

NLIZASUAIN171352

5:05 And yes, there are a lot of other door companies out there, but we're like small big operation. We're not, you know, we have just so many employees and we do things a certain way and our owner is very specific with what he likes and what he likes. So we're just trying to find what's going to be easiest for us to kind of deal with the, and the owner being comfortable with the transition.

--- *Paper process ends* ---

NLIZASUAIN171352

5:34 Yeah. And if he's not comfortable, no one's gonna be comfortable and not even we all are going to be comfortable.

JACK

5:43 Yeah.

NLIZASUAIN171352

5:44 Yeah, we go back to square one of our building blocks and go, okay, how can we make you comfortable with that? And we also like we're trying to take into account... kind of like the key players here. And so if we're doing a transition, that's probably gonna fall on like a couple of people in the office. And then we also kind of have to see how that's gonna affect day to day production and what we have because we still have to do our daily due diligence as, while doing the transition.

--- *Accounting integrations* ---

NLIZASUAIN171352

6:21 So we're just trying to see what is going to be, the easiest transition. And like I said, we weren't really looking. We weren't looking for other companies. This one just kinda our laps and we just, we did the research and we're just kinda, they're actually the most comparable company to you guys in terms of like the ones we've looked at Salesforce was like a no go Quickbooks, was just confusing to even get a grasp of what items we're going to pick.

--- Accounting integrations ends ---

NLIZASUAIN171352

6:54 So this one is kind of like a kind of like a bundle kind of like with service trade was like what you showed us at the beginning. So this is probably the most comparable company that we've found. So we're just kind of.

JACK

7:07 Using...

NLIZASUAIN171352

7:08 Both you guys to see pros and cons and so, but we don't know anything about builders other than what our sales guys clients told us and then what we've talked to the actual builders rep about.

--- Purchase decision ---

NLIZASUAIN171352

7:23 So I would like to know what you guys, what cause builders told us or their opinion of you guys. So we kinda wanna know, you know, what you guys have to say about, you know, what do you guys know about BuildOps? Yeah, what you guys know about?

JACK

7:38 Sure, before I'm happy to answer that, but before you said something very interesting and it's obviously something that's very important is there's a level of comfortability that has to be had and we totally understand that because implementing a new software, even though you guys know, you need to do that, it's probably something like God. I really don't want to do that. I want this to be an easy transition. But, what does you know? What does comfortability look like? What does the owner care about, how, what does it look like in terms of making the decision? What do you guys need to see? I'm curious as to we can dive in a little bit there first in terms of, you know, what does the owner care about in getting to that level of comfortability? How do we get there?

NLIZASUAIN171352

8:23 He likes reports? Okay, he likes reports like ports to go.

BROOKE

8:30 In way and...

--- Purchase decision ends ---

NLIZASUAIN171352

8:31 Pull certain item like if he wants to see this number, he wants to be able to come up to care or go to Lisa and be like, hey, I wanna know why this number is what it is and how it got to that. And then they have to work their little magic to try to make this report for him. So he's very much about numbers. He's also very much about static. So the simpler it looks, the better it is for him where he can just look at it and find what it is he's looking for. And he is very concerned with the transition. He says that, the transition is a disruption which he is right?

--- Paper process ---

NLIZASUAIN171352

9:19 It is a complete disruption to day operation. So he wants, he's looking for like the most seamless transition. He probably won't see any of the transition because we are the ones that can to make sure that his numbers are not affected by the transition. And when I say the trans and that's what that's basically what it is that his numbers aren't being hindered by all the chaos that's going in the office. So that's kind of what we're looking for in terms of us in the office, we've dealt with enough crap to the system that we currently have be able to just kind of pick up and run with whatever. I honestly at this point, I think anything would be easier than what we're currently working with. So I don't think anyone in the office is really gonna have a huge issue. We might have one person, but that's you know, we'll deal with that. As it comes. It's more the owner.

JACK

10:19 And him getting.

NLIZASUAIN171352

10:20 What he wants produced the system... our current access base is going back to like gold mine and building off of it. And that's currently what we're working with.

--- Purchase decision ---

JACK

10:38 Okay. That's helpful. And would the owner, would he be utilizing the system daily or is it more?

NLIZASUAIN171352

10:47 Yes, here. Well involved. Okay. Yeah.

JACK

10:53 So I'm hearing onboarding and also just can give us the information we need. I think Brooke shared like, the reports you sent over nation in terms of this is what, you know, we have to report on all the time and it looked like everything was pretty straightforward from, yes, we can give that Quickbooks can do this too, but we can

do that. And I think Brooke was able to answer to through some of those. So that's good in terms of the expectation around what those reports look like. So, thank you for sharing the other thing too. And, you know, Brooke mentioned it's been probably two months since we, you know, you guys really spoke about ServiceTrade looked at it. I'm curious to, you know, from what you remember, or if you're asked today, you know, from the owner of like why ServiceTrade? I'm curious as to what stood out from your standpoint, or maybe if there's something else we need to review, but I'm curious as to, you know, if the service trade check those boxes for you, there are other areas that we need, to dive in.

--- Purchase decision ends ---

NLIZASUAIN171352

11:52 Yeah, they do. I have like whole word documents on.

JACK

11:58 So.

NLIZASUAIN171352

11:58 Great. And everything it does for us. But now, it was a simple operating program. We, we did the demo with broke. She explained everything really well, showed us what we could do with invoicing with our technicians, you know, I relate.

JACK

12:13 All that.

NLIZASUAIN171352

12:13 Information to care. She's seen the videos like, you know, every, you know, you guys check all our boxes. The only reason like I said, we weren't looking for already eliminated everyone and service trig was like our number one can tender it. Just like I said, yeah, our sales team, they have a lot of pull here.

--- Purchase decision ---

NLIZASUAIN171352

12:36 So if they suggest something and we don't look into it, then it's like why didn't you look into it? It couldn't be tender. So we just, we're doing our due diligence with BuildOps. So like I said, they're the most comparable company that we've seen with you guys. So that's the only reason why we're tossing you guys back and forth just so that the owner has an option because then there might be the question why isn't why are we only looking at this company? So we just wanna make sure that we're doing our due diligence so that we can speed up the process. Because if we don't then we're back to square one and we have to start all over again and finding what it is that, he would like. Yeah.

JACK



13:19 Sure. And you all are, obviously, I looked at your website. It looks like you guys do a lot of like pa 80 like inspections as a?

--- *Purchase decision ends* ---

BROOKE

13:29 Yes.

JACK

13:29 Is that the bulk of the work?

NLIZASUAIN171352

13:31 No, it's not the bulk of our work. So we do a maintenance and fire inspection program because we deal with doors and it's something that you have to have. So if you have fire doors, we install fire doors, we offer the maintenance, we offer, the inspection because it's something our clients need to do every single year, like selling you're.

--- *Type of work* ---

NLIZASUAIN171352

13:55 Gonna sell the maintenance. So we install the rolling doors, we install the high speed doors. We're gonna sell a maintenance on it. We install the fire doors thing, same, we also provide the maintenance and fire door drop testing and forms that they need to for the city for the city.

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

NLIZASUAIN171352

14:14 So if they get a spot check and your doors haven't been drop tested, they're gonna get teamed and then they call us okay?

JACK

14:22 No, I love that. I think that it blows my mind when people say, they do the install and then they don't turn around and sell the maintenance contract. I'm like wait what you're just...

--- *Type of work* ---

NLIZASUAIN171352

14:32 Money right there?

JACK

14:34 Yeah. So that, that's fantastic. That, that definitely fits in terms of, you know, our ideal customer profile doing those installed projects. What are those take?

Typically a couple of weeks, couple of months tops or those look like?

NLIZASUAIN171352

14:47 The, the maintenance or the install?

JACK

14:50 The install on?

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

NLIZASUAIN171352

14:52 A couple of days, I think how many days? Yeah, you have one door depending on the side of the door, we can do it in four to eight hours. Like top more. The contract itself will take sometimes months but it's more like waiting for the material to be ready made delivered.

--- *Type of work* ---

JACK

15:10 We'll...

NLIZASUAIN171352

15:13 Remove the day of, and then install, keep the door either open or closed, then return and wire it in and do all the final touches.

JACK

15:27 Okay. Yeah. That's great. And what's fantastic too. You know, we learned a little bit about it this past week, but that's actually where a lot of research and development is going to service trade right now was helping that the beginning portion of like the actual like the install the project itself and then turning that around and doing all the, you know, the maintenance intervals, inspections, repairs, retrofit, stuff like that.

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

JACK

15:52 So we have a lot of good stuff coming out right now that's going to help with that. That kind of that circular workflow you just described. So that's fantastic. I am curious to know like especially if it's you know... we're going, if it's you know, we're going doing due diligence. We, we have to, I am, I like to ask the question of, you know, where do we win? And, and where do we lose? Or is this just a matter of you guys providing here's, everything we know about a here's, everything we know about B. And then the owner decides from there, what is the decision process look like?

NLIZASUAIN171352

16:27 It kinda looks like that. Be honest with you. We're going to give all the information. There are a couple of things that like... things that would really make our life easier. Things we just actually which I'm gonna ask because it's something that, we ended up asking. I didn't even think about one. I was talking to Brooke two months ago, but there's certain things that if one company offers and the other company doesn't that might just skew it just because of how it is that, we operate here. But to be honest with you, there hasn't really been much you guys there isn't really much.

--- *Type of work* ---

NLIZASUAIN171352

17:08 It's just information. And even in pricing, it's not far off. So it's really just presenting all the information and seeing where it goes. But I did have one question that maybe you guys can answer for me. So we're right? We're currently having a little dilemma in our system because we work with a lot of property management companies and I don't know if you guys, you know, have ever dealt with property management companies, but they change a lot.

--- *Recurring maintenance* ---

NLIZASUAIN171352

17:37 So one address can have three or four property managers within let's say like a five year span. Our system, the way that currently works is that it doesn't so we have five different let's say cards and we have to maintain all those cards open because it's the only way we can track previous billing and previous maintenance, previous anything for that specific property manager they call us. And they're like we wanna know what door you guys installed in 2019. We have to go through the search.

JACK

18:18 One...

NLIZASUAIN171352

18:20 So we're kind of looking for a better way of handling that because right now when people call for service, we ask for their address. So unless they give us their current property manager, which sometimes they don't it can fall under whichever one of the addresses, whichever one of the property managers they've had.

--- *Recurring maintenance ends* ---

NLIZASUAIN171352

18:43 Because there's no ending a client because if we delete the client, then we delete their whole history. So we're trying to see if there is a way that we can change the property manager on a property address, maintain all their information linked to the property as opposed to the management company because right now we actually have most of our new hires are in billing and they're actually people who work. So we have found a slew of issues that we've had with billing where payments weren't being received. We were invoicing the wrong people just because the information wasn't current for the property itself.

JACK

19:34 So, would you guys have to create a whole separate property every time in our system every time changes?

NLIZASUAIN171352

19:41 Say, for example, like one one, one wager that's one of our biggest like clients here. One one one wager. If you put that address in, there is like 10 name cards for them and one of them will be cbre sutler for service. And there isn't like a time stamp for each one. So you're just kind of in 20, they wanna know what door we installed in 2019. We have to go through every single one of those priorities to see when we did an install, what job we did. It's just it's it can take us a day, sometimes even weeks going through the information.

--- Type of work ---

JACK

20:18 Same property is just a different. Yeah. So in service trade, you will not lose history because we understand that we have tons of customers. So yeah, we only work with commercial contractors and industrial as well. So the concept of property management turnover is something our customers deal with often.

--- Recurring maintenance ---

JACK

20:36 So if you were to number one, you can change a jobs Bill to on a one off. If it's going somewhere different. So you can do that. You can also change a locations information. And it's still gonna roll up to the same Bill too. You can change, your ship to the location and you're not gonna lose your history that way.

--- Recurring maintenance ends ---

JACK

20:55 You're not having what sounds like a bunch of cloned locations simply just so that, you know, you're sending a Bill to.

NLIZASUAIN171352

21:02 Yes, that's our issue right now. And like I said, this isn't something that when I originally spoke to Brooke wasn't it wasn't much of an issue because we really didn't realize. And it was, we started hiring people and we got them trained and then they started doing collections and why haven't we gotten this payment in six months that we started noticing that crap? It's because, we're not billing the right people. We don't know this. This name card should have been deleted if we could, but there's no way of knowing from what time to what time they were under which property management company. So the old billing people were just sending it to whoever would pop up first and not doing the due diligence to actually search what their current billing information was not. But in they're in their defense, it's completely overwhelming.

JACK

21:55 He just walked into it yeah.

NLIZASUAIN171352

21:57 Yes. So, but that's something that, we just realized now when we closed the year and I don't know how they were dealing with it before. But if it's something that we can clean up with the, whichever new system we have, it would be extremely helpful. And that's something that we only spoke to build up last week. It, it wasn't something that, they have to like look into if they're has no answers for us. But that's like a huge for us and for billing. And that's something I want presenting to the owner. We can really use because it would benefit us. We currently keep information about each particular door at a particular address. So if they have four doc doors, we keep the spring measurement. So when they call back for service and they're like, hey, our spring broke, can you just cut it and bring it to the job site? We have that spring information. But now they change management. So now that I...

JACK

23:03 It's an onion and it doesn't need to be an onion.

--- Accounting ---

JACK

23:05 There's too many layers to it. Yeah, you can absolutely manipulate the address in terms of who's it going to, that won't affect the Bill to entity if it doesn't need to change, but the history will go with it. And you can also do that on a one off basis for like a job if you're not changing the location, but this specific jobs going somewhere else, you can manipulate it that way as well.

--- Accounting ends ---

NLIZASUAIN171352

23:31 Okay.

JACK

23:34 So, yeah, no, that's a great question. Do you have anything else? I'm very curious to know, you know, what else you all need, to know, from a functionality standpoint about service trade?

NLIZASUAIN171352

23:47 I'm sorry. Can you repeat that?

JACK

23:50 In terms of functionality? No, you're fine. Is there any other functional type of questions before we kinda move on them?

NLIZASUAIN171352

23:56 Functionality? No, not really. Like I said, Brooke went over everything like, in detail. And like I said, we really didn't have. This is probably the only like functionality question we have, but I did have a question that was kind of brought up. So how is it in terms of like customer service? So... is there any additional charge or do we have like a cap on ours for us calling if we need help with something or if we need technical support? How does that work with your company, we thing? But we found out it was a thing. So we have to do diligence and ask, I don't wanna be like 20 hours into calling you guys and then you're like there's a charge for any additional customer service. So I just kinda wanna know how that works.

JACK

24:48 What do you mean? You found out that was the thing?

NLIZASUAIN171352

24:50 Among service companies, like there's companies that have like caps on like hours of like onboarding or customer service. First 90 days you're free for calling. And then after that, now you're hit for every question you have, but in, for your service.

JACK

25:11 Understood. I didn't know if you meant that someone was charging you like per call or something like that?

NLIZASUAIN171352

25:17 No nonsense.

JACK

25:17 Highway robbery, but no, that, yeah, that's a very fair question. So, part of what Brooke has sent you in terms of our pricing and onboarding is we take our onboarding very seriously.

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

JACK

25:31 It's probably I would say it's our biggest department here, if not second biggest department. So you would be allotted a service window and it's a very conservative window. Brooke, they would have four months, I believe size and scope. So you'd have 120 days in terms of being onboarded and going live going through training, this, that and the other, during that time, you're actually given a dedicated project manager to have weekly calls with you in terms of, hey, here's, the, what we're achieving this week here, the expectations you'll be given a dashboard so you can check in to see the Progress of your project. You can see the Progress of who's gone through their certifications and training and who might need a little reminder, a little kick in the rear saying, hey, you failed that. You need to redo that. So it's very hands on and we're very conservative with that window. We have companies that get up and running well before that window all the time, but we like to extend that because we take it seriously. And the last part of that is handing you off, successfully handing you off to our account management team. So you will consistently have a

point of contact. So right now, Brooke is your point of contact when you get to and then onboarding, you'll have a project manager. And then when you're a live customer, you'll have another point of contact. So you can call and ask questions to go over your KPI'S here's. What we want to get with service trade. And they're there to help make sure you're rising and getting your return on investment. That said we also have a day to day support team. In terms of, hey, I can't log into my app.

--- Pricing ---

JACK

27:02 What's going on? Hey, why is this button popped up here? Can you remind me that is 24 seven? No charge. You have access to that. And with the level at which you guys would be signing on, you all would have 24 seven emergency support that's free of charge.

--- Pricing ends ---

JACK

27:19 But of course, if it gets into like a bigger problem or a bigger not problem, but a bigger thing that you'll want to do that's out of the normal scope, that might be an additional project that might be TAM but basic day to day questions of, hey, remind me how to do this and that, that's all day long, that, that's we don't charge for that.

NLIZASUAIN171352

27:40 And then like if we needed to add a report or would that fall into like the tnm or we're looking for something or we need to change how something looks and we don't know how to do it ourselves, which I'm sure Kari will learn very quickly. She's the it person here. But would that fall into day to day or tnm, how does that work?

JACK

28:04 It really depends on the scope of it and that's why we have an account management team to help guide you on that in the sense of like, hey, this is easy. Let me show you that you're just missing this part of the platform. But if it's like specifics around, I don't know... maybe a new dashboard or something unique created and like in terms of like the reporting functionality, like, yes, that would be something.

--- Quoting ---

NLIZASUAIN171352

28:27 Say commissions like we submitted commissions for the salesman for their month when we close the month and we're like, it's not pulling correctly?

JACK

28:40 If, if it's something that you guys have it, so that, that's something we go in and dissect to figure out, hey, we fix the bug. I mean.

--- Quoting ends ---

28:47 Okay. Yeah, because like right now, if it doesn't pull correctly, I have to go behind the scenes and then I go through and try to figure out where the glitch came from and all that stuff. Yeah. So you...

JACK

29:02 Guys that we would want you to call us?

NLIZASUAIN171352

29:05 Good.

--- Pricing ---

BROOKE

29:06 I like that.

NLIZASUAIN171352

29:07 And then.

JACK

29:08 Yeah.

NLIZASUAIN171352

29:10 Onboarding is four months, basically 120 days which I'm sure there's no company that has unlimited onboarding, but so, four months to kind of get everything in order and what we need. Yeah. Okay. Yeah, that works.

JACK

29:28 Yeah, that's again, we take that very seriously.

--- Implementation and ongoing support ---

JACK

29:31 And that's you know, we have a 95 percent retention rate with our customers and that it all starts with getting them up and running successfully. So that's why we, you guys having an unlimited, you know, person, to help with you during that time period is going to be really help you guys be successful.

--- Access to information ---

NLIZASUAIN171352

29:48 And then one in our, the put we got, so you office personnel isn't because it's just the field technicians that are basically charged for not office personnel.



JACK

30:04 That's correct?

NLIZASUAIN171352

30:05 Okay. That's what I thought and that's why I told carry, but I was like, let me just make sure. Yeah.

--- Pricing ---

JACK

30:11 I think we had sent over. Was it 15 techs on enterprise that?

NLIZASUAIN171352

30:17 I had a, I had that change because, we have one technician. We got new technicians, and then we have one technician that's like on medical leave but technically still employed. So if he comes back, we have to have a spot for him. Yeah. And so might as well include them.

--- Parts management (inventory) ---

JACK

30:35 Sure. Yeah. So like enterprise that includes, you know, our advanced reporting capabilities. That really gives, you know, access to other tools in terms of, you know, time card and, you know, mobile, you know, mobile po functionality, you know, stock transfer stuff like that because I saw that part was on your order form too.

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

JACK

30:53 So that would definitely that definitely put you in a position to be very agile with our platform and to get the most out of it. So, if we're talking about reporting and aesthetics and transitioning and getting special attention, enterprise is definitely a good place to be for your company based on your needs. So, yeah, that, that's a good, another good question onboarding. What else do you guys have?

NLIZASUAIN171352

31:17 That was about like I said, it's just the last couple of months, just a couple of things we've seen here and there, and then getting the updated quote just because we have more employees. Now we present it with. And then I know Brooke and I talked about it, but the office also has mobile access if they needed, to the software, correct?

JACK

31:47 I guess be more specific about that. Why would they need mobile access?

NLIZASUAIN171352

31:52 So, like for example... we do, we have 24 hour service. So call, yeah, sometimes we're at walmart, or we're at the park or at the zoo and we get service call and we have the, you know, I, yeah, sometimes right now, it's a little difficult because we kind of have to do everything off, our memory at the time... we have the schedule for Google docs, then we pull up the schedule. But for the customers terms, we don't actually have that app indicating, hey, these people have terms. You don't need a credit card. We'll go ahead and get a technician dispatched or you're a management company and you're not listed in our vendor approve.

--- Quoting ---

NLIZASUAIN171352

32:37 People who say, hey, you can actually come out. We'll pay you, you're just a tenant, stuff like that. So usually over the weekend, we get service on Monday morning, it's more of like an orange totally pick that customer off. So it's just to kind of avoid that. And then also sometimes if there's a pending quote, we won't send a service out because you have to prove your quote.

--- Access to information ---

NLIZASUAIN171352

33:06 But right now, because we don't have access to the system, there's no way we can remember off our little brains. If the two o'clock in the morning, you have, yeah.

JACK

33:18 You're basically, yeah. So, the short answer is yes, if you have internet connectivity, you can access service trade wherever you are. If you have connectivity in terms of cellular data or internet connectivity, like you, from what you're yeah, you would need to go into the actual mobile app itself. You would be logging into service trade is what it's sounding like. So, yes, you can do that at home. You can do that on your phone. I don't rarely. Do I log in to service trade office on my phone. But like you can do that. If you.

NLIZASUAIN171352

33:53 Okay.

JACK

33:55 We would not restrict you, the reason of clarification is like obviously, the mobile app is something completely different for the technicians. And I was like, why would office people need to be in that? So that?

--- Access to information ends ---

NLIZASUAIN171352

34:04 Yeah, no, we don't need to, we don't need what the technicians have. We just need to just have access to the information. So, we know, you know, a lot of times we'll dispatch a technician and then they're like their operators crap. We need a new one. It was written up already.

--- Purchase decision ---

NLIZASUAIN171352

34:19 Yeah, like, yeah, okay, great. Yeah, I'm trying to just trying to avoid that. Yeah. But, and I'm pretty sure we're on, I touched upon it. It was just, it's been a long time and, I haven't reviewed my notes yet from service trade this meeting. I have to like, we'll compile everything and put everything together. Have a meeting with.

JACK

34:44 Sure. Quick question. Back to the quote. I'm curious to know, if, with your owner, if there was a number that he was trying to keep it around or under, if there was a budget. Again, I don't like to speak ill of competition or our competitors out there. Obviously, they feel differently about that, but I know that they're likely try to undercut us on price. So I'm just curious if price is a big concern for you guys, what that number looks like?

--- Purchase decision ends ---

NLIZASUAIN171352

35:13 Yeah, we'd have to talk to him first. Like what you have to understand is that to the owner created the system 30 something years ago. Yes. Okay. Yeah. And so they use gold mine and then they build off of it of the platform. Yeah. So, so, it's his system that, he created, we tweak we customize to his prefer, yeah, to make it whatever he wants it to be. So he, he's poured money into this. Yeah, we actually have to stop him from pouring money and take is not gonna work. So in terms of how much he's willing to spend on a system? I don't know. Yeah, with him, you know, you just don't know, but after meeting, we'll know and then we can regroup and then we can.

JACK

36:15 Okay.

NLIZASUAIN171352

36:15 He'll he'll definitely have some questions that I know that we have forgotten to ask or he'll bring a different light to it. Well, what about this? X, Y and Z? And we like good call. So then we'll have to re.

JACK

36:32 Are, you all, are you around Chicago?

--- Purchase decision ---

JACK

36:38 We have an outside rep that lives in the Chicago area. I didn't know if it makes sense to, if we're having conversations with ownership, if it makes sense to come by. And in that way, you know, eliminate the game of telephone if need be. And just to

sit down and have a conversation, I'll leave that to you all. But that is definitely an option you guys wanted to have that.

NLIZASUAIN171352

36:57 We can bring that. Yeah, I'll talk to him. We can, yeah, we can let him know that sometimes with him, you just never know it all depends on like what day is which, we plan at very carefully. But in terms of like pricing, we've already talked to him like preliminary stages, we've already mentioned service at a couple of times.

--- Purchase decision ends ---

NLIZASUAIN171352

37:25 We've already eliminated a couple of people. He, he knows, you know, we've done, you know, he said I will check with Quickbooks because we already use Quickbooks. So, you know, like he suggested something, but, you know, he even had, he received the first quote from service trade. That was something that, you know, we showed him.

JACK

37:46 This isn't completely out of left field. It's it's within conversation and I wouldn't be a surprise.

NLIZASUAIN171352

37:51 Yeah, no, yeah, no, it's not. It's not a small project and he's very well aware of it. So, yeah, we just brought in six new trucks. So that.

JACK

38:03 Yeah, I was gonna make mention the fact system that's broken, but you guys are still adding technicians is pretty impressive because a lot of people are like, where are you finding text right now?

--- Purchase decision ---

JACK

38:14 So like, good for you all that, that's great. Okay. That, that's helpful to know. The, the one ask I have is, you know, if this does come down to price, if it does, I do ask that you allow us to have a seat at the table to at least just, you know, discuss what that looks like. And if there really is a piece of functionality that we're missing. So, but that, that's helpful information? Okay. Yeah. So from your perspective, is there, I know that you're going back to your notes, things like that, is there something that, you know, if you guys can make a decision if it was up to you guys and onboarding was done tomorrow? What system would you guys feel like would give you guys the most success?

NLIZASUAIN171352

39:02 Be honest with you... I've actually because I've gone through the service trade demo with BuildOps. We still haven't we've seen what they kind of do like, you know,

they clicked here, click there, but we didn't a demo. Yeah. With Brooke, we actually went all the way from, you know, starting up company and what the technicians did coming back invoicing.

--- Purchase decision ends ---

NLIZASUAIN171352

39:32 We kind of did everything. Yeah. So we were able to see everything full circle and everything was very easy. Very... there wasn't a lot, you know, like to, in terms of there's so many things we have to get rid of with BuildOps. There's a lot to offer a lot. But with that's the thing with our company that's very unique. We don't use a lot like we've made it work with very minimal now. And sometimes the fluff just adds more work without you realizing it. So kind of like straight to the point with BuildOps, they offer a lot of things that we just, we don't use with Brooke. And I don't know if Brooke customized it to what we needed based on what we, you know, spoke about. But she was able to show me basically what we use now, just our platform. Yeah, that's great, which was kinda nice. And then even from the technicians perspective, the fact that we were able to upload our own forms and things of that nature. Our, our technicians are very picky. They're some of them are, yeah.

JACK

40:49 Yeah, I hear.

NLIZASUAIN171352

40:51 Yeah. So getting them to change anything, it's we have to hear like a bitch fast for like three weeks before they're actually like it's not that bad. And then, to complain throughout like the duration of life. But, you know, like I was able to see everything full circle and I was able to explain that to Kari very easily. Like there was no, she saw the video. I was able to show her, you know, print screens, you know, everything and it was very, the information was transferred very easily. So, to be honest with you guys, I've been with service trade since the beginning. Yeah. So that was like my number one. I need anything else but like I said... to the table, yeah. And since it came from sales and, you know, we looked into it that's the like the most competitive tender we have because.

JACK

41:50 Like I said.

NLIZASUAIN171352

41:51 Quickbooks was a hot mess. I didn't even the Quickbooks rep. I couldn't even understand what she wanted me to do. And then with Salesforce getting a meeting with them was just, yeah, like because they didn't gone now, the never even spoke to us. So I can't even imagine getting a hold of someone if we actually needed something. And because we're a small operation, we need to have the service there. Like if I need to do something, we need to be able to call. If Jim is like, I want to see this number, and we don't know how to get it. Like we need to call because he'll have us calling accountants that aren't even with the number.

JACK

42:34 So...

--- Purchase decision ---

NLIZASUAIN171352

42:34 That's to us that's very important. So, yeah, that we have to information from ServiceTrade based, yeah, probably start to finish.

JACK

42:44 And you guys have, so you have a follow up with BuildOps to go through more of the weeds. Is that what?

NLIZASUAIN171352

42:49 After our meeting? Yeah, after our meeting, we have to get them some information which, you know, sometimes it takes a little bit time, sorry broke broken up. Times are like seven to 10 business month, but we just get so busy here in the office and things happen and it kinda takes priority and then everything just kinda falls off the map but we have to get them some information. We're gonna meet with Jim. And then after our meeting with Jim, he'll relay information to us and then we can kind of like spread everything amongst everyone and see, where that takes us. But, the urgency. So the urgency is there very much especially for us in the office because we understand the importance that if our system crashes, we, were so like that's just, it, it's relating to the owner, the importance and that this is actually going to happen sir. Because the first time we presented, he was like, what do you mean? Exactly? So.

--- Purchase decision ends ---

BROOKE

43:57 You...

NLIZASUAIN171352

43:58 Can't rebuild my 19 fifties and, we really did try to rebuild the platform but we're just passing too much money away. Yeah. And, the it text that we're working with us were falling like flies. They were like they were disappearing, quitting like not, they just couldn't do it because I quit because we gave her too much anxiety. Yes, like our system gives people an, yeah. So it's just getting him to understand the importance that he has to let go of his current, his baby and he has to kind of jump into something else and relatively quickly because like I said, I was telling Kari yesterday, I was like, hey, I did some stuff in Quickbooks yesterday. Yeah, completely different. It's not carrying over. So Quickbooks is not making us completely leave the platform yet, but they are doing like underground updates that are affecting our system as we move along.

JACK

44:57 So.

NLIZASUAIN171352

44:58 The urgency for us is there, it's just it's we basically have the light the fire under his, the updates the best I can. Hey, you need that update. No, like you need to like downgrade us now.

JACK

45:17 Throwing throwing gas on a fire there, you?

NLIZASUAIN171352

45:20 Yeah. So, well, we should be meeting with him. I'm hoping in the next week. So depending on how his schedule here. So he's not in the office, right? But he's here every day. So that's where we're at.

JACK

45:36 Okay. No, that, I appreciate. Thank you that. That was that's really helpful for us to know in terms of us, you know, we will be professionally persistent, and in patient at the same time. But in terms of sales people having pool, we will send you some information that can help you guys have that conversation.

--- Quoting ---

JACK

45:58 Because the idea of our ability to find efficiencies, find repair opportunities, report those, turn them into those online quotes. And as soon as they're approved, you can just create a job from a quote with one click of all that visibility and quoting and all that stuff right in there.

--- Quoting ends ---

JACK

46:14 Salespeople of service rate for that stuff right there, and we don't even charge them to use it. So that's the craziest thing about it. So we can absolutely send you guys some more ammo especially if they're saying guys, look at this, look at this, look at this.

NLIZASUAIN171352

46:29 And then real quick for, our sales team, it's something that we did speak to BuildOps about. And I don't remember I spoke to Brooke about this or in terms of... them mobile being able to create quotes. I know the technicians have mobile apps for sales. So right now, our sales reps, they can't do anything out on the field. What they can do is they can write stuff on a piece of paper. They can take pictures with their phone, and then they have to come back to the office and kinda everything or two o'clock coffee shop or wherever they can plug in the computer. So for our sales rep, it's difficult to just generalize colts on site. And I know that's something that we have a couple of sales guys that would super appreciate. Yeah. So I could see the drill. Yeah. So that's something that would be a huge pitch point because for the owner, the only people that make money in this company are sales and technicians, okay?

JACK

NLIZASUAIN171352

47:37 Yes. Yep. So if we can accommodate them and make them happy, it's a huge selling point for him because that's where that's what's generating his money. So, the technician side of it like I saw car saw like it's easy. But if we can just any information you guys can send us on. Like the flexibility sales has mobile things that they can do while on the road, while on site converting those notes, they take two quotes, if that can be easier, because even right now they have to like they have to type everything in.

--- Paper process ---

NLIZASUAIN171352

48:16 And, if they change a purchase order on their end, it doesn't even transfer in our system. They have to like retype it out. It's just, it's a very difficult process on their end. They make it work. But, you know, it would be easier for them. It would definitely be a huge selling point.

--- Access to information ---

JACK

48:37 So, I used to work, in the field. So I used to go see customers a lot, and one thing that people would do sometimes is essentially just they would have the technicians mobile app. But then like they'd go in and they'd be taking the pictures and the videos and stuff like that and essentially just showing the perspective customer. Hey, this is the type of experience our technicians have. And this is the experience we can give you when we're on site and showing them the pictures, videos and stuff like that. And then they can obviously, with the right permissions create a quote right there on their iPad or, you know, smartphone and be like, and this is also what our quotes look like too if you wanted to move forward with us.

--- Customer engagement ---

JACK

49:12 So that right? There is a huge selling point and then also train that around to the customer portal of being like. And by the way, all this pretty information will live right on our website for your.

NLIZASUAIN171352

49:21 That's a huge that is, I completely forgot about, that there is a customer portal and they can see everything.

JACK

49:29 Invoices, quotes, upcoming work, all that stuff. So phones like you guys have going off can stop ringing every day. So that's the whole point of that.



49:39 Okay. It works.

JACK

49:42 So, I think Brooke and I will get together and send some stuff I think too with being on enterprise, the level of reporting and the aesthetics, things like that.

--- Customer engagement ends ---

JACK

49:49 I think that is an upgrade too. So we'll make sure that you guys can see what that looks like. We'll send some. Are they in recap? Brooke? Do they have a workspace?

NLIZASUAIN171352

49:57 I actually, I, Brooke, is that how, you know, I was looking again because I logged in, the other day and then Brooke emailed me and that she's taught me log in.

BROOKE

50:08 Yup. You caught me.

JACK

50:09 All right. We'll we'll update that space with some new resources for you guys to take a look at. And then just, the last thing I'll say, you know, I'm very well aware that specifically built up likes to talk more about us than themselves. Have fun with that. That's an interesting strategy. But in terms of being a business, you know, we got our start in the fire life safety space, we only work with commercial fire protection, mechanical contractors, who do, you know, light, install, specialty projects and recurring maintenance inspections and service calls. So we, we've are very much invested in that so much the fact that we acquired a company called Asurio last year. And so now we have our new director of fire life safety partnerships. He sits on the board of in pa, I think 72 three 425. So we're very much invested not just in our customers but also the industry they work in. So that's why everything we do in our platform is designed specifically to help you guys out of the box.

NLIZASUAIN171352

51:13 That's a good point, for Jim. Yes.

JACK

51:18 We'll we'll put that in writing to, we'll put that on. Yeah. So moving forward, we'll share that information with you guys. It sounds like when are you guys meeting with Jim?

NLIZASUAIN171352

51:31 Couple of weeks? Yeah, we, we're trying to, we have to find, we have to find a good date for him and, a good day for him.

--- Dispatch ---

NLIZASUAIN171352

51:39 I better start walking in the morning and seeing like, yeah... no... he, how he is in the morning. And then if everything is good and peachy then you know, then we, yeah, that's how it goes.

JACK

51:57 All right. So, I guess, Brooke, I mean, we'll touch base with you guys obviously weekly.

--- Purchase decision ---

JACK

52:02 We'll just keep up with you guys in terms of what that's looking like. And, you know, hopefully shoot by the end of this month, you know, we can get back together and talk about what we might need to review. And if that involves having Michael who lives in the Chicago area, come by and just, you know, you can shake our hand and meet us and he can talk more about who we are as a company and, you know, who you're actually partnering with. So.

NLIZASUAIN171352

52:25 Yeah, yeah, that he likes local, yes. Yeah. So that might even you guys might be super far, just one person coming in. He's gonna be like they're here exactly.

JACK

52:37 Cool. Brooke. Do you have anything else that we missed today?

BROOKE

52:42 No, you guys answered all my notes and what I had.

--- Purchase decision ends ---

BROOKE

52:46 So I appreciate all the detail and transparency, but Nisha, I'll plan to check in with you. I'll start with a week from today just to see it has any Progress been made, and then we can kinda go from there.

NLIZASUAIN171352

53:01 Yeah. And if I have any questions about anything, right? I wanna see something or any information that could help out when me and car meets. I'll just shoot you an email and then, you know, we'll go from.

BROOKE

53:09 Yeah, shoot me an email or there's the ability to add comments in the recap workspace is if you prefer that, but...

NLIZASUAIN171352

53:16 That works.

BROOKE

53:17 Yep. But yeah, we'll compile that information and then we should be able to get back to you this afternoon, if not tomorrow morning. I know that Jack and I are in different time zones now. So maybe tomorrow morning is more realistic.

JACK

53:30 Lived in the west coast. She left us. No, it's great. We love having her out there. It's it's where her family lives. We're very happy, but we're going to miss having her in the office. But guys, it was great to speak with you all. Thanks for all the information you gave us. Looking forward to sharing more with you all, and figuring out a path to this partnership. So thanks again, and we'll be in touch.

NLIZASUAIN171352

53:55 All right. Thank you talk.

BROOKE

53:58 To you soon, thanks Jack.

*The End*