Meeting with ServiceTrade & Power Pros Electrical

Brooke Caskey with Power Pros Electrical Ltd.
Recorded on 2/13/23 via Zoom, 1 hour 46 min.

Participants

ServiceTrade

Brooke Caskey
Territory Manager

Anna McMahon
VP of Inside Sales

Power Pros Electrical Ltd.

Kirby Sewell
President

Tyler Wehage
Service Manager

Other

Topics

Transcript

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BROOKE

0:00 He, Tyler.

TYLER

0:03 Morning. How are you?

BROOKE

0:04 Good morning. I'm doing well. How are you?

TYLER

0:10 Just waiting for can code here.

BROOKE

0:14 Cool. And then my VP, Anna is gonna join us today.

TYLER

0:18 Perfect. Perfect.

TYLER

0:25 Was, how was your guys weekend?

BROOKE

0:29 And was good, more relaxing than exciting.

TYLER

0:32 Yeah, that's good. Sometimes that's good.

BROOKE

0:35 Did you, do you guys in Canada was?

TYLER

0:39 I'm actually not a huge football fan, but there, there's quite a few people. So, I didn't even know, is on actually, that sounds probably pretty bad, still probably this week, so.

BROOKE

0:49 That's okay. Honestly, I didn't either, and I live in the states.

TYLER

0:52 Okay. Yeah, it sounded like an exciting game master.

BROOKE

0:57 Anna, did you watch it?

ANNA

0:59 I watched about five plays of it but Ryana, was awesome. Yeah. So, yes.

TYLER

1:07 I haven't seen the half time show yet. So, I...

ANNA

1:10 Yeah, you know, you can get it on you too.

TYLER

1:12 Yeah.

ANNA

1:13 Go in but...

TYLER

1:15 The game was.

ANNA

1:16 Yeah, the game was really good. And I think it was the first time there was two teams both being led by black quarterback in the super bowl.

TYLER

1:26 Right. Yeah.

ANNA

1:27 So, it's black history month and...

TYLER

1:30 I...

ANNA

1:31 Thought it was very symbolic and yeah, it was an exciting game. Unfortunately last couple of years, I just can't I don't have the patience to sit through an entire.

TYLER

1:42 Yeah... just wanna skip to the half time show.

ANNA

1:47 Yes, that's really why I stayed.

TYLER

1:51 Yeah.

BROOKE

1:51 Yeah, I watched that has time in the last five minutes to see how it ends and that's all I need. Yeah, and we are just waiting for care and Cody.

TYLER

2:02 Yeah, the JS and they should be signed on here any minute.

ANNA

2:06 Cool. Tyler, I see the helmets in the background. Are you a racer?

TYLER

2:12 No, it's actually the owner of the company used to raise more cycle, so they're actually his.

ANNA

2:19 Very cool. We have a lot of more cars than motor cycles, but we have a lot of car and racing enthusiasts.

TYLER

2:31 That's awesome.

ANNA

2:31 Service trade. Yes, I like to drive fast, but I'm not into race?

TYLER

2:38 Do...

ANNA

2:39 You think about cars?

TYLER

2:40 Yeah... okay.

BROOKE

2:43 Hey, Chris.

KIRBY

2:45 Good morning. Everybody. How are you?

BROOKE

2:47 Hey, Cory. That must be.

KIRBY

2:50 This is Cody. How's everybody doing?

BROOKE

2:56 I...

ANNA

2:57 Doing pretty.

BROOKE

2:58 Well, how are you?

KIRBY

2:58 Yeah, very good.

TYLER

3:00 Good.

ANNA

3:01 Very good.

BROOKE

3:02 Talking about the super bowl.

KIRBY

3:06 That was yesterday apparently.

BROOKE

3:08 Hey, watch.

ANNA

3:10 It's so.

KIRBY

3:10 Funny. Yes, there was a cool.

ANNA

3:14 Commercial that was talking about how football was actually invented in Canada. I haven't googled it to see if they were lying or not, but that was a fun fact.

KIRBY

3:30 Yeah, interesting. Okay. Hannah. And we have not met you before. I haven't seen you on... any of the calls.

ANNA

3:39 No, this is my first time. Brookes kept me kind of in the loop about your evaluation and hard work with you guys. But my name's Anna MC, man, I'm the VP of sales here at service trade. So, I've been with the company about seven years. I just celebrated my seven year anniversary and I'm excited to talk to you guys. My father's a master electrician has had his own business in DC for the last 40 years. So I especially love working with electrical companies. So fine.

KIRBY

4:16 Okay. Well, nice to meet you.

ANNA

4:18 Nice to meet you guys as well.

BROOKE

4:20 Okay. Yep. So just like Anna said, I've been sort of keeping her up to date on the back end on our conversations Jack and I have, but I thought a good place for us to start curvy is if you guys wouldn't mind giving Anna and I a rundown of perhaps what you've discussed since our last meeting, where things stand in your evaluation.

--- *Purchase decision* ---

BROOKE

4:41 That way we can get a good idea of sort of what we're here to talk about today and then where the conversation needs to head.

KIRBY

4:46 Okay. So just to be, and just to be aware of everybody's time today, I'm open for a little bit. Is everybody on, do we only have an hour here to spend broke or can we go over that a little bit?

--- Purchase decision ends ---

BROOKE

4:59 So I blocked off an hour. Well, I have flexibility beyond the hour. If we need more time than that.

ANNA

5:10 Yeah, I'm good until two 30 eastern. If we go over a little bit, then we're...

KIRBY

5:17 Okay, right.

KIRBY

5:19 Can go to two 30, but I can that one?

KIRBY

5:24 No. So I'll tell you what we're looking for today. So, and so Tyler and I did like the high level research with service trade and we had some lots of great presentations with Brooke and Jack and the other gentleman there. I'm just missing his name. I think it was Brian.

BROOKE

5:47 That's...

KIRBY

5:48 Sorry, who was it?

BROOKE

5:49 Right.

KIRBY

5:51 Yes. So... I would like to now... like I say, Tyler and I kinda research some different companies out there.

--- Purchase decision ---

KIRBY

6:03 Cody and I have been researching some different companies and we've all kinda just out there seeing what's available for us and what's going to be the best fit. So I did wanna make sure we spent some time today with Cody to give him a demo today. Brooke. Is that going to be possible? Okay?

BROOKE

6:21 Okay.

KIRBY

6:22 As long as we have enough time for that to give him to give him a good overview of what the program looks like, that'd be great, and where are we at with things? Well... we've looked at this will be... for five programs in the mix. We have, will it down to two programs there's, BuildOps, which I don't know if you're familiar with or not... and serve trade. And now we've brought Cody into the room to kinda just evaluate what we think is the best move forward and that's kinda where we're at.

BROOKE

7:12 Sure. Well, I know that BuildOps I think came into the game a little bit later than service trade, right? Or when did you initially look at them?

--- Purchase decision ends ---

KIRBY

7:22 Well, we were looking, we were kinda... because we're also looking at changing over to Sage impact right now and we just have a lot of balls in the air. So we're really trying to, and we're still trying to, you know, run the company efficiently with possibly making these changes, these program changes. So, Cody had been in contact with somebody a year ago at build.

--- Accounting integrations ---

KIRBY

7:47 Yeah, they reached out a year ago, but at the time didn't have sort of a connection tool to Sage 300, Sage impact. So it so then reached out again, he actually just reached out to me here a few weeks ago and just said, hey, we now have a connection tool to Sage 300, and it just sort of at that point, we said, okay, well, it doesn't hurt to see sort of a demonstration or presentation of what?

KIRBY

8:14 Program?

KIRBY

8:14 Is, and, yeah, that's kind of where we're at where we narrow it down to sort of service trade and logs.

BROOKE

8:24 Yeah, it's...

ANNA

8:25 It sounds, Brooke mentioned that you guys were considering changing accounting systems. It sounds like you guys have a lot of moving pieces when it comes to the technology and how the business is operating. Can I ask what's kind of driving... you know, all of the technology research and focus. Is it just really to accommodate growth in the business or?

KIRBY

8:54 Yeah, or is in a sense?

KIRBY

8:56 Right? SSO SSO service management under stage is just not a very, it's a very cumbersome program.

--- Customer engagement ---

ANNA

9:05 Yeah.

KIRBY

9:05 And we get a code, just enter there's we just get no reporting. We can't tell you what some client tells, you know, profit and losses. We're just, we just don't have the right information at our fingertips that we need to evaluate the growth of our business. And you also mentioned growth of the business.

--- Accounting integrations ---

KIRBY

9:26 We are growing. And we're looking, we wanna make sure we get the right programs on board right now so that we grow into the future, those programs can grow with us. And Sage 300 is all that old timberline program. It's also very cumbersome. And a lot of people from what we understand right now are shifting from the Sage 300 platform to the Sage intact platform, which is more user friendly.

--- Accounting integrations ends ---

KIRBY

9:54 So, and, you know, I apologize to you, Brooke. I think you're on our 24 with us right now or more. But because we were sold, you know, we were sold that SSO was gonna be, was gonna carry us well into the future and it's not. We're definitely doing an extra due diligence down to make sure that we pick the rate programs.

BROOKE

10:18 Absolutely. I think at the end of the day, it goes into the why of... why are you making a change? And in what areas of the business are you prioritizing when you're looking at service trade versus something like BuildOps? And so, my question for you is when you're looking at the different pieces of the puzzle in different parts of your business, what would you say takes priority in terms of your workflow? Is it service maintenance? Is that your project work?

--- Type of work ---

KIRBY

10:58 All of it, it's every, each and every department is just as vitally important as the other?

KIRBY

11:04 With four department managers… and each one, I mean, we do use pro or for our projects department. We also use it for our ev department for the project work that they do, because a lot of it is larger but they kinda have a blend of the two based on the fact that some of it is service work.

--- Type of work ends ---

KIRBY

11:23 And then they have a project which SSO didn't offer a very didn't offer really any sort of project tools, right?

BROOKE

11:32 Are you planning to leave or no? Okay.

KIRBY

11:37 No, right now, we just implemented it and it actually, it's been fantastic. We do really like it. Yeah. You guys, do you have a project tool or is it?

ANNA

11:50 So, we, you know, we are designed for commercial service contractors. Pro core is actually a partner of ours and I know quite a few people that have worked for pro core for years, great company, very good technology. So, one of our, you know, one of our partners, we're familiar with the shortcomings of SSO for businesses like yours as well. I think Tonia who you guys spoke with actually sold Sage products for quite a bit, right? So not only from the experience of customers who have come off of SSO, but from her expertise, you know, it's just, you can't rely on your accounting system to give you the operational metrics to run your business, right? That's just the long and short of it. So, so that makes a lot of sense, right? I think… you know, Cody, I know you haven't seen service trade yet. And so we'll get to that. I'll just say fundamentally, you know, one of the key differences between BuildOps and service trade is, we are, you know, we started first and foremost on service contractors and their business, especially with being able to optimize your recurring work, your pull through revenue. And that is something that we can uniquely optimize because, you know, it's not the sexiest part of our product but our data architecture is built and designed to proactive work at recurring work and pull through revenue. Like I said, right? We do have some project management functionality. I think BuildOps is a newer company, but they more, I think started on the project side… and that's kind of the biggest difference I think between us and BuildOps just kind of at our core, right? There was one other thing I was going to mention and I don't remember what that was. So that's part of the reason that I asked or that Brooke asked, you know, what are some of the key strategies in terms of your growth plan over the next couple of years? Because that can really help kind of determine your win criteria.

KIRBY

14:18 We right now are handcuffed in growing our company or I feel that we're handcuffed in growing our company and any further until we have the proper programs in place and we understand this code said cocoa proven to be a very good tool for us. And there's two departments... that are using it right now.

--- Type of work ---

KIRBY

14:46 Our residential department is kinda, I guess gonna be beating it little bit. We're starting to use that tool and then we just got one one department left in that service maintenance, which is our, you know, call it our bread and butter and...

TYLER

15:02 You know, it's...

--- Type of work ends ---

KIRBY

15:06 Historically, it's always been historically it's our department that has the best opportunities. And right now we have client sitting on the sidelines that we just don't want to go to yet until we're well prepared to make sure we're going to be able... to do a great job.

BROOKE

15:25 Yeah.

--- Type of work ---

ANNA

15:25 Absolutely. And I think service and maintenance is such a unique business. I think in a lot of ways it has more similarities to like us as a software company, right? Because it's recurring revenue. It's long term relationships. And so it's just very different from, you know, the Construction or project side in terms of operations which I just found like I work with GC before coming to service trade and my father does all project work.

--- Type of work ends ---

ANNA

15:56 And so that was kind of a business shock to me when I started here on, you know, managing in that type of business. I did have a quick question because just out of pure curiosity, I don't wanna take too much time, but Brooke had mentioned that most of your customers had really been working. We're good with just providing you guys an nte in the past but quoting out kind of additional work has become a pretty big piece of the business. I would love to just get some context on what's kind of changing in the industry and what's you know, what do you guys think is driving that?

KIRBY

16:44 I just...

KIRBY

16:44 Think.

KIRBY

16:45 With the increase, you know, obviously everybody's having to increase their service rates and stuff, right? They're getting more expensive. We've probably seen it at a faster rate than we've ever seen. So obviously, the end user is seeing massive increases and I would assume it's probably driven from sort of their CFO or whoever saying now we want, you know, instead of just putting blind faith into a contractor, we actually want competitive numbers knowing that they probably are going to get everybody to sharpen their pencil a little bit more, just, yeah, which is a huge overhead burden on our end to sort of carry that through now when we technically need to be increasing our rates even more of all of this. So it's a catch 22. But yeah, I would say that's likely what's driving it. Yeah, but it has changed for the last five, six years anyway.

ANNA

17:45 I mean, it's just interesting, right there's so many things that are squeezing the market, right? And so, you know, one obviously labor shortage, I know you guys have that problem in Canada as much as we do here in the us. But low price competitors customers, you know, sharpening their pencils and wanting to make sure that they're getting the best price for, you know, the service that they're getting. So it was just interesting. You guys were the first people to mention that the rate of nte approvals, has, you know, been changing.

--- *Purchase decision* ---

ANNA

18:24 So cool. So Cody is there, I don't know how much context curvy and Tyler gave you on service trade, but was there anything in particular you're really hoping to see today?

KIRBY

18:42 More of a general overview of the program just kinda take you through but test start to finish sort of what I guess what a call looks like, right from the start call comes in and just sort of how the program walkthrough the whole process, right?

--- Type of work ---

BROOKE

19:02 Sure. I had a preventative maintenance job setup for us. Does that sound all right with you?

KIRBY

19:08 Sure. I was fine.

BROOKE

19:10 That style of work...

ANNA

19:13 Before we.

BROOKE

19:13 Get into the demo, just going quickly back to the project management piece. I had in my notes here that most of your projects are longer term in terms of the link that they're lasting. And it sounds like right now pro core is what's handling those projects. So I just want to have a good understanding of when you're talking about wanting to see project management and not looking at switching pro core. Are you talking about maybe your shorter term projects on that piece of the puzzle?

KIRBY

19:43 Right now, we're taking the projects that are in service that are longer term projects. We're actually shipping them out of service now and our projects departments can handle them that's the way we used to do it. And then things got a little bit, you know, the lines got a little bit fuzzy as to where it fell. We're really pushing it back over to service. So service would deal with, you know, some projects maybe in that 50,000 dollar and under range, you know, it depends but yeah, short, a little bit shorter duration, not what we're having to tie up a service technician for a month at a time or anything?

--- Type of work ends ---

BROOKE

20:15 Right. Okay. Perfect. So on the service side, your projects are more in like the few week range.

KIRBY

20:23 Yes.

BROOKE

20:24 Okay.

ANNA

20:25 Makes sense.

BROOKE

20:27 Excellent. Any other questions or items to bring up before I hop into the demo?

KIRBY

20:37 No, no break into the demo, please?

BROOKE

20:39 Yeah, perfect. Okay. So let me go ahead and share my screen here.

--- Access to information ---

BROOKE

20:50 Okay.

ANNA

20:50 So...

BROOKE

20:52 High level today, but I'm beginning here in the office then hopefully I am sharing the right screen here. Can everyone see my PM job circling my mouse? Okay. So here is a work order from the office admin perspective on this work order. I have a PM a that is a recurring service from one of my customers here.

--- Recurring maintenance ---

BROOKE

21:15 So we're doing an annual generator maintenance today. When you're setting up these services, you'll be able to set them up in a way where you can say, hey here's the asset that we're servicing here's. How often it needs to reoccur, you can add preferred technicians, estimated price, duration, things like that.

--- Tech On-site ---

BROOKE

21:34 Those are one and then set up that way when the services do this information here, pulls over fluently. So you'll have your description, your parts, labor, and items of what needs to be done each time... scrolling down on this work order, you'll see that as we go out to the field in a second here and make Progress since service trades a cloud based platform, everything we do is going to relate in real time.

--- Deficiencies ---

BROOKE

21:59 So as I clock in, clock out report any sort of deficiencies on the equipment I'm working on, take photos, leave comments, things like that. Everything's going to relate back in real time so that everyone in the office can take the best next steps necessary. One thing to highlight is that we're really big on asset tracking and.

--- *Assets* ---

ANNA

22:16 Service.

BROOKE

22:17 Trade. So each work order that you have set up is going to be tied to a specific piece of equipment. And each piece of equipment you'll be able to go in from both the office and the technician perspective and see exactly the details, make model here, things like that. But also previous service calls and previous issues found. So we'll just look at that real quick. So here is my generator. I don't have too much information about it filled out, but you can see that we have preset fields for you for our customers feedback for important information that you might need about any piece of equipment.

--- *Assets ends* ---

BROOKE

22:57 And then down below, I can see that I've done 12 jobs on this generator, found seven deficiencies so far sent out a few quotes, things like that. And since I already scheduled the job, obviously looking at this from like a different perspective that you haven't scheduled it before you're trying to figure out who's best suited for this. Maybe dependent on the history, you know, which technician to recommend.

--- *Assets* ---

BROOKE

23:28 Any questions so far?

KIRBY

23:30 No.

BROOKE

23:32 Yup. Okay. So I am gonna switch over to the mobile view.

ANNA

23:41 While Brooke is doing that... I just wanna call out. So I think that especially with, you know, long term relationships, not only can you see the whole service history for every location that you work at, but as Brooke just outline on every piece of equipment, right?

--- Access to information ---

ANNA

24:00 So you really get that Rich customer record to help drive some of your operational decisions as well as, you know, communication with your customers.

BROOKE

24:13 So now we're here on the mobile view and everyone can see that now, right? Okay, perfect. So when you log into ServiceTrade from a technician perspective, and just to clarify where iOS and android friendly phone tablet completely your preference.

--- Access to information ends ---

BROOKE

24:29 The first thing your text will see is their appointments scheduled, I like to filter mind by today to keep myself organized. Other things they can see on their homepage are unscheduled jobs. So maybe think of a scenario where they say, hey, as long as you, as long as you guys get out here in February, it doesn't necessarily matter what date you go out there. Just come when you can. And, you know, that Brooke needs to do that job, you can assign it to her without actually giving her a date and time and she can go in and do that on her own schedule. And then of course, completed work orders focusing here on our I hop job. Here is my mobile reporter. So the purpose of this work?

--- Tech On-site ---

ANNA

25:08 Quarter Cody?

BROOKE

25:09 This should be intuitive resourceful and really set your technicians up for success overall. So first single note at the bottom is those clock events. So we've got onsite and route and job prep and route is where they can send your customer a notification time. Hey, I'm gonna be there in about an hour and I'll actually send you an example of that right now.

--- Customer engagement ---

BROOKE

25:41 And I know that might seem like a smaller gesture but in looking at the way that the industry is shifting and sort of the expectations for receiving a service, whether you're ordering seats or ordering something on Amazon, it's customer to know like the time line of where it stands.

--- Tech On-site ---

BROOKE

25:55 So we definitely encourage our customers to use that. But now I'll go ahead and clock out, clock in. And from there, I'm gonna go up here to my services. Take a look at what I'm here to do today and keep in mind the description here is all pretend verbiage.

--- *Assets* ---

BROOKE

26:11 Of course, you'll have your own and then you'll have flexibility on who gets to see things like estimated price. But now I know what I'm here to do. And then my next thought is always to go down to assets. And from a technicians perspective, I definitely wanna look at that generator I'm working on and I wanna see maybe any notes left to make sure that the make model serial number are all up to date. But more importantly, from my perspective, I wanna access the service history. So here your technicians can click and they can see any past maintenance as any emergency calls, repairs, things like that on this piece of equipment and they can click into each of these work orders and see exactly the details shown and who is here last. So I can see that, you know, last week Jack and I were here.

--- *Forms* ---

BROOKE

27:09 Now remind me, are you guys sending your technicians out with maintenance checklist at the moment? I think we're in that like lightly.

TYLER

27:21 Not not currently, but it would be nice to have an option if we can add custom tasks for a specific.

BROOKE

27:31 Right. Well, we won't go too far into detail on this aspect. But so, you know... you can have billable blank paperwork within service trade I, that's routed to dispatch according to the job or customer type you're on. So if you have like a tasking list for... a generator, let's say and you can have the system. No, hey, when you're on this type of job, we're gonna dispatch this specific form.

--- *Forms ends* ---

BROOKE

28:02 And then your technicians can go in and fill out the list as needed. It'll be your list that you provide us and then they can connect that directly to the work order. So definitely something we can handle once you get more into that workflow. But here since a big part of service trade is driving pull through revenue, let's say that we're going through completing this service call and we identify that. There's an issue with the generator.

--- *Deficiencies* ---

BROOKE

28:34 And so what I did was I clicked on new deficiency and here's how the technician can log exactly what was found on the equipment. So I can say that maybe there was a bad battery. And then from here, I can take some photos of the battery. Your technician can take live photos or they can upload photos from their library. They can also take videos and audio memos. If anything is making a funny sound, things like that. We'll just add a few more pictures here.

KIRBY

29:06 No. What's wrong with the matter?

BROOKE

29:08 What's wrong with it?

KIRBY

29:09 It's not a boundary. It's a lamp that's the problem with the battery.

KIRBY

29:14 But it's a pretty cute lamb. Yeah, like animation. They're riding along in the fire.

BROOKE

29:20 So, sorry get, and now here, your technician can select the severity of the issue that they found and keep in mind sort of the story telling timeline aspect for your customers. Because if we've been here, let's say a couple of months ago, we made a suggestion to them. They chose to put it off and that we're back again and it's become increasingly worse. We have that information to present to them. Like, hey here's why you need to act on this now.

ANNA

29:48 Yeah. And what we found is that those multimedia attachments that the field is collecting, being able to not only tie that to the equipment and location.

--- *Quoting* ---

ANNA

29:58 But as you'll see providing that information easily to your customers have made a huge difference in terms of approval rates. We've actually found some data that five to six attachments is kind of the sweet spot in terms of approval rates from your customers. And I would recommend that your technicians mark this or go through this workflow even if it is something that is under an nte because as you can see, they can mark it as something that's fixed, add it to the invoice. But again, it gives your customers visibility of what they're paying for to just reduce the amount of questions.

--- *Deficiencies* ---

BROOKE

30:45 Yeah. And now wrapping this up, I have the option to mark it as either new, fixed or verified. And so in this case, I'm gonna mark it as new here because we're gonna get back to the office and quote it out. And then your technician can add a proposed solution. Now, as soon as I say this, whoever is in charge of perhaps quoting or making sure the right parts or things like that is going to be sent that notification that a deficiency was founded. I hop, they'll have that report available in their email and they can click it and literally flip it right into a proposal from there.

--- Access to information ---

BROOKE

31:25 And we'll walkthrough that next. But I wanted to pause here and Cody, is there, I guess what do you take away so far on the mobile view?

KIRBY

31:37 I mean, it looks good.

KIRBY

31:45 Is there a way to like with your app? Is there, I'm just kinda going to other programs we've sort of seen... to mark off.

--- Tech On-site ---

KIRBY

31:56 So if there's steps in a service call and, you know, they arrive and then they've got to sell up the paperwork and then they've got to do, you know, and then when they finish out a job, they've got to, you know, sort of finalize the job or if they have to take photos, is there a way to sort of like that so that they can't finalize a job until they've completed certain tasks with some of our technicians?

--- Tech On-site ends ---

KIRBY

32:22 They may, you know, they may go to a job and only be there for an hour, but they don't actually do any of the safety?

ANNA

32:28 Paper?

KIRBY

32:29 And they skip it because I'm quick, I'm in and out, but then we're tracking it down the road. And then they're trying to do safety paperwork, but, you know, is there a way to sort of prevent them from sort of taking the next steps until they actually do certain, you know, the steps before.

--- Forms ---

ANNA

32:45 Yeah. So Brooke showed the paperwork functionality, right? So things like safety checklists or things of that nature that's definitely how you would want to handle it and tasking for certain types of service that's how our customers handle it. Today. In the first half of this year, they'll actually be more robust simplistic tasking associated with the service, right?

--- Forms ends ---

ANNA

33:16 So I think it sounded just from the examples that you gave, there's gonna be cases for both where, you know, one of our customers has somebody has a customer who's a large franchise and that customer for any of their locations has very specific paperwork that they want to fill out.

--- Assets ---

ANNA

33:37 So that's where the blank paper work will come in. But the general tracking of like a tasking of check your filters, you know, clean the coils, all of that stuff. What we found is our customers are actually tying that as part of the maintenance agreement. So we're improving the services piece so that it will be kind of more of a check from that standpoint.

--- Assets ends ---

ANNA

34:04 So that's not something we can show you today, but that is literally around the corner. I will say philosophically Cody we not, we try not to restrict your technicians, right of saying like you have to perform, do all of the things before we let you click out. And that is a very conscious decision because quite frankly the work you guys do is complex. So there's always a reason that they might need to move on to another job. They got called out on an emergency or something. So we try to make it as simple as possible from a user standpoint, get that information visible across the organization as quickly as possible to reduce those errors. But we just fundamentally don't like to handcuff your guys in the field.

TYLER

35:02 Can I ask you a quick question or one of you with adding the forms? Is that something that we are able to do? Or is that something that we have to provide you guys to upload into the system?

BROOKE

35:17 You can pay our team a one time fee to do it per page. It's about 149 per page for us to convert them for you. But we, we've had other customers that learn how to do it via do it themselves. So it's more just do you want to spend the time doing it?

TYLER

35:33 Okay. My next question was, yeah, once it's implemented, is there a cost after to upload new forms? But that is something that we would have an option to do on our end?

--- Forms ---

ANNA

35:43 Yeah, you do need like something like a Adobe PDF editor, right? And one of the advantages of service trade is that we can pull information about the equipment, the customer, the work order and have it pre fill for your technicians. But there's a training video that we provide to everyone so that you can do it yourself if things are changing a whole bunch, that might be worth it.

--- Paper process ---

ANNA

36:12 But I kind of the analogy I like to use is I'm fully capable of cleaning my own house, but I still have a, you know, a cleaning lady come in because they can just do it faster and quicker than I can. So I'm willing to, you know, spend the money, you know, every couple of weeks so that they can just do it and I don't have to think about it.

--- Paper process ends ---

TYLER

36:36 Perfect. Thank you.

BROOKE

36:43 Perfect. Okay. Now, from here, so I'd like to think the tiles here are pretty self explanatory, but Cody any of these standing out to you that you're curious about before we go back to the office?

KIRBY

36:57 No, that's pretty straightforward.

BROOKE

36:59 Right. Well, one thing that we like to encourage here at service trade that I think you guys will agree with is sort of the concept of giving your customers Rich detail and keeping them up to date on what's been done this far on a service call, especially when issues are found.

--- Tech On-site ---

BROOKE

37:16 So one thing that we can talk about before going back to the office is a concept of creating a work acknowledgement or getting a signature from a customer on site.

Tyler. I can't remember, are you guys collecting signatures actively now?

TYLER

37:31 For certain clients, we are, yes.

BROOKE

37:34 Okay. What sort of the criteria for which clients need a signature versus do? Is that more of their call or your call?

TYLER

37:42 We, we would need to generate a service report just of the work that's completed, and then have a onsite contact sign off on it because the dispatching company is based in another province. So they just need to know what was done and that someone on site authorized basically that, yes, it was completed.

BROOKE

38:01 Okay. So just like what you mentioned, there's a tool here called a work acknowledgement where we can do just that. So I can select Cody here and go through and say, hey, Cody, we came in for your generator maintenance today and any other services that we may have performed if there were multiple.

--- Deficiencies ---

BROOKE

38:21 And here are the pictures I took, the items that I used. Everything went great, but there was one deficiency on the generator. You're gonna need to replace your battery pretty soon. Here. We'll send you a quote for that today. And then they can just sort of give their blessing that, hey, they understand where things stand and we're on the same page of the next step is they're expecting a quote in their inbox... and then they can mark your teas and sees and provide their signatures needed.

--- Tech On-site ---

BROOKE

38:48 And Cody, I'm sending you a copy of that.

BROOKE

38:56 All righty. So let me go ahead and I'm gonna clock out here. You'll see when I clock out, it's asking me to mark what I've completed. So since I've finished my maintenance, I'm gonna mark, yes, I'm done with that. And then here, it's really up to you internally, how you want your technicians to proceed? They can say, yes, I've done with this visit or they can mark no in like in the anticipation of coming back to do a repair or replacement, but I will say yes for now.

--- Tech On-site ends ---

BROOKE

39:26 And then we'll go back to the office.

--- Tech On-site ---

BROOKE

39:58 Alrighty. So back here on our work order, we can look at the Progress that we've made from a technician perspective, right? So here we can see it's been completed by our technician. From the office perspective. We're still in Progress as we're doing our final review, keeping those checks and balances in order, scrolling down, we can see what I've done on site. So here are my two back events here. Is that deficiency that I found? We'll come back to that in just a second. And here is my work acknowledgement where I gain the signature here. So everything transfers in real time, focusing here on our bad battery. Here is the report that you're quoting person would receive in their email.

--- Deficiencies ---

BROOKE

40:44 And Tyler, remind me who does the quotes for you guys? Is it anyone on the call?

TYLER

40:50 So we have a separate estimator list.

BROOKE

40:53 Okay. All right. So they would receive this report here and this allows them to review the details of what was found. So, for example, we can see that this bad battery has been marked as efficient. We found it today. Technician thinks the best next step is to replace it. And she's even included a few pictures of the issue here. And we can see, has this happened before?

KIRBY

41:20 Hey, Bart.

KIRBY

41:22 You keep saying they're sending the reports to me? I haven't received anything. Does that come after or?

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

BROOKE

41:30 So, when I say they'll be sent the report, I mean, when you set up your service trade account and you dictate who needs to receive that. So you're not gonna receive this report today, but you will receive the.

KIRBY

41:44 Right now?

ANNA

41:46 Yeah, I think what you should be receiving in your email is a lot of what like the customer would see as you guys are doing work like the, in route we're on, we're in route here's, the signature from the, as if you're the onsite contact, right?

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

ANNA

42:05 We're very much about making it easy for you guys to show your customers, right? The valuable work that you're doing.

TYLER

42:15 Set up as a.

KIRBY

42:16 Customer?

TYLER

42:16 Right now?

ANNA

42:17 Correct.

KIRBY

42:19 Should I be receiving the email saying you're on route just in as a test right now? I haven't received anything is what I'm saying?

--- Quoting ---

KIRBY

42:27 Okay, so I just wonder if the email address is, may be wrong that you have. So I don't have any like any of the options that you've been saying?

ANNA

42:34 Okay. Well, we can check it while we're doing the quote while we're sending the quote. Brooke, does that look, right?

--- Quote templates ---

KIRBY

42:43 A UNDERS that our, yeah.

TYLER

42:48 That's...

KIRBY

42:48 Correct. I just...

KIRBY

42:54 It might just.

ANNA

42:54 Be on a delay.

BROOKE

42:57 Yeah. Let's see if the quote works, but yeah. So from here, we can utilize this information to go ahead and create our quote and within ServiceTrade, you can have different pricing contracts to manage your mark of rules and margins.

--- *Customer engagement* ---

BROOKE

43:12 So, if you have a specific customer where their pricing fluctuates or needs to be at a certain number. You can tie those to each quote.

ANNA

43:24 Yeah. And our goal here is to make you know, this process in terms of finding repair opportunities out in the field to getting the quotes approved and then delivering on that work as efficient as possible. We actually found that in the last couple of years, the companies that have this process streamlined are growing at a significantly faster rate than their peers, right? Despite just general growth in the industry. This has been a really big driver of hyper growth in the market. And so not only are you pulling all the details from the field here, but on the previous page, because we track all your asset information, it also gives you details like any related issues with that piece of equipment or at that customer to really inform your estimator of what's the right recommendation to make, right?

--- *Quote templates* ---

ANNA

44:19 But we try to bubble up and use technology so that all that information is and that Rich history is at their fingertips before it gets to the customer.

ANNA

44:32 Has that been helpful to you guys? So would that be helpful?

BROOKE

44:41 And now we're on our quote building page and I'm just gonna go ahead and apply a template here. And I thought I had a battery one, but maybe I don't see. So the templates here just to point out these are again pretend verbiage for the demo. So you'll have your own description part item. So I'm choosing a random one, but pretend that says something about a bad battery and you'll have your quote description.

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

BROOKE

45:08 And then the items that, you know, will be required to fix this issue. And then you'll also have full control over what your customer sees in terms of pricing, I think here. And Tyler said you guys tend to lean towards grand portal. Am I remembering correctly?

KIRBY

45:27 Yes.

BROOKE

45:27 Okay.

--- Quote templates ---

BROOKE

45:30 And then keep in mind, we're also showing you your margin. If you make adjustments to these numbers, your margin will adjust automatically. So from here, we have our quote Bill. And now I can go ahead and I can send this to the customer. I am gonna send it to all three of you to see... if maybe we have to check something on our end.

--- Quote templates ends ---

BROOKE

45:49 So let me know if anyone gets it. And I'll also pull it up here.

KIRBY

46:03 I haven't received.

KIRBY

46:04 Anything yet. No.

BROOKE

46:05 No.

BROOKE

46:16 Well, none of you do. We'll definitely check something on our end to make sure that there's no Bob on sending on our quotes.

KIRBY

46:22 To my way to junk mail?

TYLER

46:26 State in mind actually.

ANNA

46:29 That was, that was gonna be my next suggestion. My next suggestion was to check your spam folder.

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

KIRBY

46:38 Yeah. Yeah, that's what it is. It's in spam?

BROOKE

46:45 All righty. We'll go ahead.

KIRBY

46:48 Everything's down there too. So.

ANNA

46:50 Okay.

BROOKE

46:51 Yeah. Go ahead and click on the view and respond to quote details. And then you should end up on the same page as I am here. Yeah.

KIRBY

47:07 Yeah.

KIRBY

47:08 Yeah.

BROOKE

47:09 Is gonna be a quote sent out from ServiceTrade perspective. Now, of course, you're gonna have your name and logo here instead of our little art mark, but you would have the description of the work the services you're proposing be done. And then the media attachments. And again, we recommend five to six for the most effective storytelling. You'll have your, the and on the quote and then easy engagement from your customers, which they can either approve it by clicking approve. They can put in a number if necessary, then marking off that they have read the details and understand what they're approving or instead of a big red reject button, we found that a request changes button is more helpful in continuing the conversation between you and the customer.

--- Quoting ---

KIRBY

47:55 Nothing like that.

KIRBY

47:56 And we know of the, and Brooke, you already know that we've opened these emails, correct?

BROOKE

48:02 I do know that's another notification you can set up is if you've viewed it, and when you respond to it?

ANNA

48:11 Yeah, Brooke, do you wanna take them over to see the history of that? So anyone in the sales function can get notifications. When the client has opened it approved it, you know, that's kind of a per user notification, setting a, that across all of our jobs and quotes, you'll be able to look at the actual history to see what's going on, right? So, if you made a suggestion, if you made a suggestion on a repair.

KIRBY

48:49 The...

ANNA

48:49 Customer didn't take you up on it. And then they're upset because they have a maintenance agreement with you can pull up the history and said, hey, we reported to you on this date. So, and so reviewed it. You guys didn't approve the quote, but from a sales perspective, I love the notifications because especially if a customer has an unexpected, you know, expensive repair when they're looking at the quote that may be a signal for you to pick up the phone call, walk them through it... yeah.

TYLER

49:19 Can it, will it, alert you that they viewed it? Like, is there an actual alert that you'll get?

ANNA

49:25 There's a notification? Yeah.

TYLER

49:28 My, my only concern is that if we're emailing it out to say newer clients and it ends up in their junk or spam box that we're not gonna know whether they received it.

ANNA

49:40 So.

BROOKE

49:43 The history button here and I'll say it is, it's rare that the quotes go to the spam folders. I think we can look into maybe what causes that to happen. But the history helps because you'll be able to see, hey... our quoting person set this up but no one's looked at it yet. And so then that would be for you to maybe give them a call and say, check your spam folder when that happens.

TYLER

50:05 Okay.

ANNA

50:07 You can also run reports to see what quotes are outstanding that haven't been viewed. Let me just make sure, yeah, actually, yeah, submitted but not viewed is one of the options for quote status. So you can actually run reports. And so we sent out last week, I wanna see all the quotes that I sent that hasn't been viewed.

TYLER

50:33 That's really handy. Thanks.

BROOKE

50:35 Yep. So you just filter by the status here and then it's pulling them all up and you can actually bulk follow up on those or resend them to get them to the top of your customers. Inbox. You can leave a little note like, hey, just making sure you saw this things like that.

--- *Quoting ends* ---

ANNA

50:49 Cause the junk mail is really going to be dependent on each individual clients kind of how sensitive their email client is. So, once, you know, once they're aware after the first time, then you can, you know, it won't be a problem after that, but we have those reports just as a backup, you.

--- *Quoting* ---

BROOKE

51:14 Cody, if you have the quote open seller, whoever does, would you mind approving it for us on your end? Just so you can see sort of the flow for your customers?

KIRBY

51:25 I approved it already. I wanted to be the guy.

BROOKE

51:28 I...

KIRBY

51:29 Was just getting to.

TYLER

51:30 But...

KIRBY

51:30 I'm gonna give you a purchase order number.

ANNA

51:33 How you do?

KIRBY

51:37 I'm by, I didn't this is why.

BROOKE

51:39 Usually target one.

ANNA

51:40 Person for the demos?

BROOKE

51:41 To do this, so I don't have anyone by over who gets to approve it.

ANNA

51:44 Or...

KIRBY

51:45 Competitive so...

ANNA

51:47 Love it.

BROOKE

51:48 There we go. We curb one. So curb, I can see that you approved our quote here with your po number with the date and time stamp as well. So you'll know exactly who gave the yes... especially when multi people view it multiple people view it.

KIRBY

52:08 First, actually, I...

KIRBY

52:12 I...

KIRBY

52:12 Was first if you look at the report, but that's neither here nor there.

BROOKE

52:19 So... ROAS, now that our quote has been approved, your next step here is obviously gonna depend on the situation at hand. Sometimes what we're approving is something easy to tack onto the existing job.

--- Quoting ends ---

BROOKE

52:36 Maybe our technician doesn't have too much going on that day, can head back and fix it. Other times, it's more complex where it makes sense to be its own work order. So that will depend on what has happened. In this case. I'm just gonna add it to my existing job... and we'll go mark that.

--- ST app contracts and pricing ---

BROOKE

52:56 And I'm gonna copy my quote attachments, my comments and quick preview of project management here. We can now create budgets for any jobs that we do. So I don't think a budget would apply to this type of job, but pretend that we were getting some sort of like project work approved, then we have that functionality.

--- Deficiencies ---

BROOKE

53:26 Yep. So here we are back on our original work order and I've added that new approved repair service on to that original PM. So again, that was just the example I chose today. You can separate them if you need to.

ANNA

53:45 So when I mentioned earlier about, you know, the pull through revenue kind of workflow efficiency... service trade manages that full circle within our system.

--- Accounting integrations ---

ANNA

53:57 So you get the benefit of having all of that information, building that Rich customer record and equipment record as well as the tracking so that you can see who's touched it both internally and externally, right? Because I've heard, I mean, I've heard all sorts of crazy stories from our customers.

--- Accounting integrations ends ---

ANNA

54:18 Hey, you know, we went and did the work and then the invoice got disputed because they said no one internally approved that we did this work. Well, now you have full visibility on that, right? And if anything, it just helps diffuse any, you know, miscommunication with customers.

BROOKE

54:41 Well, Cody, before I continue, since we sort of walked through a high level of... really service raised value proposition when it comes to helping you achieve more pull through revenue.

--- Customer engagement ---

BROOKE

54:53 And what you've seen so far, do you see why our customers are growing due to these processes?

KIRBY

55:00 Yeah, no.

KIRBY

55:01 Looks good. It looks good.

ANNA

55:06 Well, it's five to two. I know we discussed, you know, we can go over a bit, but I do want to be conscious of everyone's time. I think code you said you could not go to past two 30.

--- Customer engagement ends ---

KIRBY

55:21 11 o'clock here. So I was saying that be a long demo, but I guess if you're back east then it may.

KIRBY

55:27 Welcome to Pacific Time.

ANNA

55:29 Yeah, we would not do that to you. My sister lives in Seattle and apparently only wanna text her at eight 30 Eastern Time.

--- Customer engagement ---

KIRBY

55:39 Yeah.

KIRBY

55:40 So...

ANNA

55:40 It's usually the next day... you know, obviously this is, you know, this is the fastest way service trade kind of pays for itself. But as I mentioned, you know, how we help optimize, you know, the growth in your service and maintenance business. Was there any other key things that you guys wanted to see?

--- Customer engagement ends ---

ANNA

56:03 I know Tyler and curvy, you've had opportunities to look at more of the platform. So, I perspective or Cody from?

KIRBY

56:11 Yeah. And in light of time, I think we just, yeah, I think I'm gonna jump in here. I want Cody to see. So Brooke, do you mind going? Can we invoice this job please?

--- Tech On-site ---

BROOKE

56:23 Yep. So here, I can go ahead and we'll pretend that we went back up out of course and replace the battery, but we'll complete it from the office and you'll see that when I click complete job, it prompts me to complete my job and create my invoice.

BROOKE

56:46 Now, from here, your billing person can make sure all the costs and quantities are correct. They can add any job items that maybe were left off before the technician forgot to add anything. I'm not gonna be too picky today.

--- ST app contracts and pricing ---

BROOKE

57:19 And now here, we can see our total versus our margin to make sure we're making the appropriate amount on the job again, that will be all tied to your pricing contracts. And then we can dictate how our customer sees the pricing. So I showed you guys a grand total example.

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

BROOKE

57:37 I'll show you guys a line items example. Now, just so you can see how they're listed. And then we'll go ahead and save that. And then your customers would receive an invoice link in the mail is what we call it. So let me pull up a preview.

BROOKE

58:07 So here's what your customer would receive in the now, so they're going to have your name and logo. Of course, they go to service details which will go through in just a second. And then the pricing as you wish to present it, whether you wanna do a grand total or are listed out there's about seven different combinations on how to present it. And then your TS and CS at the bottom. Of course, what you guys won't have unfortunately is the pay now, but, and it's not quite ready for our Canadian customers yet. But Anna, correct me if I'm wrong, it is something we're actively thinking about. I think it's more on stack side.

--- Invoicing ---

ANNA

58:43 Yeah, that's not something that's active on the road map, but it's something that we definitely want to do.

BROOKE

58:52 But your customers can still obviously pay via credit card on the phone or check. And it's really easy for you to input those details. And I'll show you how ones were done going through this here.

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

BROOKE

59:02 So what I just did is I clicked on my go to service details button. This takes your customers to our service link that outlines the scope of work that was done on their site. So the service link is gonna show them the service is completed, of course. So I can see that we did the maintenance for the generator and we came back and we repaired the bad battery. If you want to. You can include things like what parts were used to, any comments left by the technicians that are relevant to the customer. Of course, this entire report is completely customizable in the sense of you get to control what goes on and what does not go on. And then here are our files. So we've got that signature we collected. And then I say they had filled out like a checklist too, that would show up on the files as well. And then here's the pictures of our deficiency. And here is that fixed bad battery that we took care of.

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

BROOKE

59:57 So viewing this report from a customer perspective, Cody, I'll ask you, do you see why this is going to help them understand what was done and where the resources are going and what needs to be done perhaps next?

KIRBY

1:00:11 No, no, it looks good. I think it'll be, it's pretty straightforward pretty clear.

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

BROOKE

1:00:18 And then remind me how much of your customers paying now?

KIRBY

1:00:23 Typically over the phone like credit card or?

BROOKE

1:00:27 On the thumb? Yeah. Okay.

TYLER

1:00:30 Have to upload it to portals as well. So just to be able to download it as a PDF. Okay? And then would we be able to see if the customers view the invoice as well? Is that going to be in the same job history?

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

BROOKE

1:00:46 I believe so, right? Anna.

ANNA

1:00:48 It's gonna be on the, on this page on the invoice page and everything is linked, right? So, you know, you can easily navigate back to which job this invoice is associated with. So you get the benefit of the history and again just kind of along the way collecting all this data for your customers so that they can see what you've done and what the value is.

--- Customer engagement ---

ANNA

1:01:17 I actually had one of our... a CFO at one of our customers say the amount of disputed invoices that they had just drops significantly from showing the service opportunities, right? And our goal is to help you guys present yourself as a premium brand, right? So, when you are raising your service costs, you know, you're working with customers who are more than willing to pay for the amount of service that they're getting, right? And the customer service that they're receiving through your work?

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

BROOKE

1:01:52 Yeah. And I just sent the three of you the copy of the invoice for your.

ANNA

1:01:59 Yeah. And Tyler, you mentioned having to upload into portals and stuff. So you can, there are the print and download PDF options for both the quotes, the service report and invoice.

BROOKE

1:02:13 Yeah. And then your invoices are also going to be in your customer portal via service trade for your customers to reference as well.

--- Invoicing ---

BROOKE

1:02:23 And then in terms of collecting payment. So let's say a customer calls with payment information on the phone, really easy for you guys to add payment with a reference number, and then... mentioned how they paid and how much they paid. So I'll just say that someone with a credit card called paid the amount in full and we're good to go. And then that invoice is marked as paid?

--- ST app contracts and pricing ---

BROOKE

1:02:53 Yeah.

KIRBY

1:02:58 Brooke, you have, you've shown us a few samples of... services in our demos. In this, where you're working from right now, can you show us how much work you've done with a bar in the last year and show us what the gross margin and everything is, give us a high level of what, where we're kind of a, with how many jobs or do you have a certain client set up inside your demo program here to show us that?

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

BROOKE

1:03:32 There are a few ways to do that. And I'm wondering if you are thinking of, are you thinking more because there's the jobs report, of course, but then there's also things like quick site or you?

TYLER

1:03:45 An overview?

KIRBY

1:03:46 Look of like looking at a snap out of that client to see sort of profitability of the work we've done throughout the year or?

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

BROOKE

1:03:55 Yeah. Well.

ANNA

1:03:58 Yes. So just for contacts or bark is our fake brand. So, but in terms of your question of seeing what the profitability is for your customers to, at the very basic level, you can run a jobs report for any similar to that quote page, where you can pick a specific customer.

--- Accounting ---

ANNA

1:04:23 So across all of their locations, all the jobs, certain types of jobs, you really can cut it multiple different ways and get all that information now to see something like profitability as it stands today. Just with core service trade, you are, you do export to a spreadsheet and, you know, can run all your formulas to get that information easily, right?

--- Implementation and ongoing support ---

ANNA

1:04:50 So all the data is there for enterprise level subscriptions. We do provide a data warehouse. So if you have a BI visualization tool we use, we personally recommend quick site through Amazon, you can run that information and have it as a visual representation essentially in real time. So our customers who utilize quick site, we have built out like boost revenue dashboards and things of that nature to really give you that visualization.

--- Implementation and ongoing support ends ---

ANNA

1:05:29 I mean, I'll be Frank, it's something that we have also talked about adding some of that visualization... in service trade. And that is something that is planned for this year. But most of our larger customers especially the ones who are very metrics driven... they want the flexibility of a BI tool so they can slice and dice the business in, you know, multiple different ways and can cut it easily according to their, you know, desired preference. Are you guys using a current BI tool or?

KIRBY

1:06:19 No, I mean.

KIRBY

1:06:20 Where it's been, our frustrations come in with SSO, and that is just getting those sort of metrics out of the system are very difficult to really dig into the program and kinda there's just not sort of simple. I mean we can do that with on some levels but it's very much sort of sitting down to create these reports as opposed to just somebody like Tyler being able to quickly just look at a customer and sorta see a history, right? You know, they come back in eight months or two years from now, they come back and we've got a new tech, somebody working in there and they're accepting a job and then they want to look to see if this is even a profitable customer. Are they, an, is there, you know, just something quick without pulling a full, you know, going into see right now, we pretty much have to go back into service manager at Sage to get...

BROOKE

1:07:18 Reporting.

KIRBY

1:07:19 Right? Which is...

KIRBY

1:07:22 To know if it's...

KIRBY

1:07:23 Yeah. We don't even know if it's the right one after them, we call, we don't even believe in.

TYLER

1:07:27 Yeah. Well.

ANNA

1:07:28 From my conversations with Tonya about SSO, it's they don't collect the right information to get you in terms of the efficiency and, you know, actual operational data to get there. So, as I mentioned at the beginning of the call, you know, one of our distinct differences across anyone else in the market is our data infrastructure.

And so we collect all of that data to give you that information. I'll be quite Frank. I want us to do a better job of visualizing it and that is a priority for this year. Tasking as I mentioned earlier, is coming around just the corner, right? Reporting is on the road map for this year... but I never rely on roadmap completely so that's the plan. But if you really want to get kind of in your like at your fingertips to be able to see all the moving pieces in your business. Ultimately, at some point, you are gonna want business intelligent BI tool, right? Like for my sales organization, I use Salesforce. I know how to run reports, create reports that's what we've done. And right now, I'm going through us as a company is going through a transition from even Salesforce who has that information to going into some BI tool that can not only pull what my sales organization is doing, but all of our financial data and all that and collect all of that for one beautiful, you know, dashboard filled, you know, business metric location.

--- Purchase decision ---

KIRBY

1:09:21 Sounds good.

BROOKE

1:09:26 What other questions?

KIRBY

1:09:29 I don't have much. I mean, I didn't get an overview from Tyler and curvy prior to this. So I kinda gone through a lot of it with me. It was just more to sorta see the program and the steps going through, which is.

KIRBY

1:09:41 Do want it quickly? We've got with 20 minutes here broker to be respectful, 15 minutes. If that's not, you wanna see a new client, just, do you wanna have Brooke quickly on a new client to an invoice?

KIRBY

1:09:54 Yeah. How does that look? If a call comes in and it's a new client setting them up?

--- Purchase decision ends ---

KIRBY

1:09:59 Most like the dashboard Brook where you're now the dispatcher scheduler or your Tyler or somebody and the phone call rings. So you just quickly run Cody through just setting up a new client right through to an invoice being sent and paid.

BROOKE

1:10:16 So...

KIRBY

1:10:17 We wanna ask too many questions if you could, just if you just wanna talk Cody quickly through that process.

--- Dispatch ---

BROOKE

1:10:24 Yep. So they're just to confirm you guys are talking about, say someone calls in for an emergency call, you've never delivered service for them before. How are you dispatching that call and adding them in as a client? Am I understanding correctly?

KIRBY

1:10:38 That's correct?

BROOKE

1:10:39 Yeah, yeah. Easy. So here we have our dispatch board. I'm still sharing my screen, right? I should be right. So when you open up your dispatch board, this is gonna show you in real time what's happening today in right now. So you can see which technicians are on the schedule, how much work they're doing and maybe who's available to go to an incoming call and then ignore all my random offices down here.

--- Quote templates ---

BROOKE

1:11:04 You're just gonna have your one office, but we'll go ahead and click add job. So if a customer that was already in the system calls in, they're gonna auto pull through. So like if I type in, I hop and say Cody calls from ipo, if I click that, all of his information pulls through. But what you wanna see is a new customer. And so I'm gonna click add new location... and then curvy I'm gonna pick on you since you're here. So we're gonna say curve you're calling?

BROOKE

1:11:43 And we'll put in your email.

ANNA

1:11:44 I is.

BROOKE

1:11:48 That right? Correct. Okay.

--- Quote templates ends ---

BROOKE

1:12:01 And then I'm making up a fake address for you guys actually, and I thought that isn't there a way for Google maps to pull... addresses?

ANNA

1:12:13 Yeah, it does. It starts pre filling, but if you're putting in a fake address then?

BROOKE

1:12:19 Okay. Well, let's do something like.

BROOKE

1:12:27 On...

BROOKE

1:12:33 No, no.

KIRBY

1:12:35 That's fine. Mcdonalds is good. Take address.

BROOKE

1:12:41 All right. There we go. And we'll just use a.

BROOKE

1:12:53 You guys get the idea. Okay? So we're putting it in and then we'll use that as a Bill billing address. And then from here, now, we can say what kind of call is it? So we can go ahead and say, hey, maybe they're calling about some sort of emergency and they need us out there as soon as possible, preferably today. And since our technicians are pretty open today shouldn't be a problem. So we'll say at least we can get out there at three o'clock to give us time to pop in everything we can describe the problem. So we'll say that.

--- Deficiencies ---

BROOKE

1:13:31 Generator is broken. Now, this is a first time customer. So you're not gonna have any assets tied to them yet. But what you can do is you can tie it to the building. And then when your technician gets to the site in their mobile app, they can put in, hey, here's, the generator that's broken here's.

--- Assets ---

BROOKE

1:13:50 The make model, so number, and then they can save it as an asset to that customer unless your point of contact knows what it is and they're able to tell you, then you can put it in here.

BROOKE

1:14:10 And then... you want to select your service line to keep the system... tracking what kind of work we're doing. And then you're going to want to... put in instructions for your technician. So I am just saying troubleshoot... and let me make sure I have everything here.

ANNA

1:14:39 The billing name.

--- *Assets ends* ---

KIRBY

1:14:48 Okay.

ANNA

1:15:05 And the asset?

BROOKE

1:15:08 Yeah. I thought the building would pop up.

BROOKE

1:15:18 And am I crazy or does the building usually pop up?

ANNA

1:15:21 Scroll up?

BROOKE

1:15:23 Let's see.

--- *Dispatch* ---

BROOKE

1:15:36 Let's see on site there we go. It wanted me to say what you were here... and then you can go ahead and save this. I, I'm not sure why the building is not popping up. That's usually the default that might be a setting on my account. But what I can do here is I can assign this job to me and I can save that. And then it should populate on my calendar.

ANNA

1:16:00 That's added or changed to the technicians schedule within, I think 24 hours they get notified. It obviously shows up in the app, but we wanted to have that extra layer. And if you don't know who, who's available, then you can just leave it unassigned. And then the dispatcher, can, you know, move things around if she needs to see who's all?

KIRBY

1:16:25 No.

KIRBY

1:16:26 The tax notification, is it via text or email or?

ANNA

1:16:30 By email?

KIRBY

1:16:31 Okay.

BROOKE

1:16:34 And then just like Anna said, I can take this and it's really easy drag and drop, I can click and I make, I can make the job no longer if we need more time and then if I click into here here's, the work order that I just created.

TYLER

1:16:52 Will, will that technician get enough notification that you've added a job for his day?

BROOKE

1:16:57 Yep.

TYLER

1:16:59 Okay. And then if it's the same day and say a customer calls in and cancels this request and we take it out. Well, he get a notification saying that it's been cancelled. Yeah.

--- *Dispatch ends* ---

ANNA

1:17:09 Any, any changes in schedule same day? I?

TYLER

1:17:14 Right. Well, notify. Okay, perfect.

BROOKE

1:17:16 Yep. So here's the work order we just created looks just like a work order that we looked at earlier. And then in line with that, a new locations been created as well.

ANNA

1:17:33 Here, the workflow is ultimately very similar to what you guys saw with the maintenance job, right? This gets this batch out to the technicians. You see that Brooke messed up the address real. But from here, the workflow is very similar all the way up to the invoice. Any questions, comments, concerns? I know you guys have been looking at a lot of technologies.

KIRBY

1:18:06 Just to, just for the sake of time here, I'm starting to a little bit that we're going to end this call.

--- Invoicing ---

KIRBY

1:18:12 Can we now go to in the invoice? Like I wanna, I now wanna just, and I wanna populate, like I want to create an invoice from this call out.

TYLER

1:18:25 So...

BROOKE

1:18:29 So, we're saying, like we went out, we did the work.

KIRBY

1:18:33 We did the work.

TYLER

1:18:35 So...

BROOKE

1:18:36 The invoice.

ANNA

1:18:36 Is gonna look...

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

BROOKE

1:18:37 Just like the invoice that I showed you for the PM job. So, happy to walkthrough it again, but it's not gonna look any different. It's...

KIRBY

1:18:45 I wanna show Cody how we now modify on our end. How we're going to modify. We're gonna add a couple of hours on our end in the office as we prepare this invoice to send to the client. Did you already get to the invoice? Did you guys got that far?

--- Tech On-site ---

KIRBY

1:18:59 But...

ANNA

1:19:02 More from the technician to the office workflow? So, Brooke, why don't you add a couple of items just from the office view onto the work order, and then we can go to the invoice. So, obviously, you know, the technicians, if it's prescheduled work, your maintenance stuff, you can have those items pre populate according.

TYLER

1:19:25 You...

ANNA

1:19:26 Know what you're delivering? But in the case of emergency work, the technician can add their items from the field. You see, Brooke can add from the office, and this is all on the work order prior to even getting to the invoice stage?

KIRBY

1:19:41 That's right? Yeah.

BROOKE

1:19:43 Yeah. So I've just added, I added some labor and then some wires for the job at.

--- *Quote templates* ---

BROOKE

1:19:57 Does that answer your question crabby, or did you want to review the through process again?

KIRBY

1:20:02 No, that would be great. And now, if we go to this invoice, it's gonna update all the, it's gonna update everything, correct?

BROOKE

1:20:12 Yeah. Well, when...

BROOKE

1:20:19 So here's what I just added in and we can add in more as needed upon creating the invoice.

--- Quote templates ends ---

KIRBY

1:20:26 Sites and the rates and everything like that. Okay?

BROOKE

1:20:49 So here's our invoice. Of course, you guys are going to have better margins than I do here typing in my random numbers just like we looked at last time, same same concept.

ANNA

1:21:01 Yeah. So throughout the process, again, this is, I think one of the key differences of a lot of companies have relied on their accounting platform to be the main software vendor into their business. However accounting systems are designed not to be very flexible. So with service trade, everyone can kind of put in their input. The office obviously has the ability to make final changes. And through this, the invoicing process, they can make changes as needed. Yep.

BROOKE

1:21:38 That's good.

BROOKE

1:21:43 What else are you guys curious about today?

--- Implementation and ongoing support ---

TYLER

1:21:48 I have one question as you guys move forward like ServiceTrade and prove the program, additional things with our base price, that implementation is set up. Is there any changes that would be included with that? Or would everything kind of moving forward be an additional cost like an additional module or as you guys upgrade the base platform, does that come with the initial setup?

--- Implementation and ongoing support ends ---

ANNA

1:22:15 Absolutely, right. So there are three levels in terms of subscriptions, right? So there are some features that are on the enterprise level versus the premium, which I think is what Brooke you previously quoted. Yep, that's really where most companies start, right? And so as we make updates to the product, you get updates to that, right? We do have other functionality, right? Because our job is to help you grow your business. And so as you grow, you need more things. And so... you know, we have other, you know, other products that work seamlessly with service trade, but not everyone needs them, right? So, but our goal is to help you grow.

--- Accounting integrations ---

ANNA

1:23:01 We also have an open API, right? This is a customer engagement platform for your business, a customer operation platform for your business. So we also have an open API. So any monitoring techno ology, you can really plug in to work with service trade. So I think that's one of the critical pieces.

--- Accounting integrations ends ---

ANNA

1:23:24 We personally use a ton of technology to run our own business. And having that kind of open platform ability to integrate is really critical in terms of optimizing, you know, your effectiveness as a business, Tyler, you mentioned earlier in terms of the initial setup and do you have to pay for things later?

--- Implementation and ongoing support ---

ANNA

1:23:47 Absolutely not. But we do have a professional service team because our customers stay with us for the long term. And so as technology improves, they'll come and ask us in terms of special projects. Hey, can you do this? Can you take some burden off of my team? And so we have an entire team dedicated to helping our customers with, you know, technology projects to make their business run more smoothly?

--- Dispatch ---

TYLER

1:24:17 No.

ANNA

1:24:18 I think Brooke mentioned that you guys know Andy from elite.

KIRBY

1:24:23 We actually went and sat with Andy for four and a half hours with no food. No program from start to finish. Tyler had to carry me out through the doors because I was so exhausted. But Andy did a really good job showing us your product like from start to finish.

--- Dispatch ends ---

KIRBY

1:24:43 And Tyler and I had a really good understanding of what it... of how it performed. And yeah, and Andy is a great he's a great ambassador or product for sure.

ANNA

1:24:57 Yeah.

KIRBY

1:24:58 I have, is another program that we deal with is site docs for our safety. So all of our safety documentation and stuff. Do you guys have a... safety documentation sort of module? Or do you link to site docs? Do you know?

ANNA

1:25:21 Is it DOC?

KIRBY

1:25:24 You know, and I mean, we're open to changing, but we've had we've struggled finding even proper has a safety document portion. It just doesn't meet the needs of what we need. We're for certified. I don't know if they have that on the stage, but that's sort of a high level of safety certification that we have and we need it for some of our customers. But proper didn't quite meet those needs. I just, I don't know if you guys have that.

--- *Forms* ---

ANNA

1:25:55 Yeah, we do. I mean, that's honestly, a lot of our customers start with the blank paperwork piece, right? Just because it does give you that full tech functionality. We do have a product service forms that is more driven for things of that nature that integrate seemly, but as I mentioned, we also have an open API.

--- *Accounting integrations* ---

ANNA

1:26:20 So our customers have integrated other platforms into our system and can pull information, right? I am a big believer that... you know, I always say, you know... start with service trade and, you know, you can continue to grow for there. So if you're comfortable with site, do you know that I would probably look at integration pieces first or just the systems kind of separately and then evaluate, you know, service forms and comparison to what it would be to integrate the two systems?

--- *Purchase decision* ---

BROOKE

1:27:00 Okay. I'm on.

KIRBY

1:27:07 I think I'm good, Tyler... I.

TYLER

1:27:12 I'm good. Thank you very much.

BROOKE

1:27:17 Okay, perfect. Well, I think Anna and I are curious now that you've seen a little bit more of service trade... code for you. How do we maybe compare to what you've seen with BuildOps? You know, where to... go ahead.

KIRBY

1:27:33 It's definitely a, you know, a great program. I think there's definitely parts where you both shine in different areas and maybe lock in different areas. So it's sort of now, I think to sort of sit down and look at the two options and see what is the best fit for us. But I mean, it's a great program for sure.

BROOKE

1:27:59 What's gonna kind of drive your decision making now that you've seen the both of them?

KIRBY

1:28:05 Well...

KIRBY

1:28:06 I mean, in one sense, the one thing I like the most about BuildOps is their pricing module is this is your price, you get everything that the program has to offer at all levels. Any changes? Anything added is comes to us at no charge if we need to reach out to them.

KIRBY

1:28:26 And you.

KIRBY

1:28:28 Get that implemented, that's all included. And I just get nervous sometimes with programs. I know we went through this with stage where it just seemed here's your price. And then by the time you actually go to where you need it to be, your price is actually close to being up here as opposed to, you know, you think you don't need something. And then you start where we even found this a little bit of where you get into the program, you get using it and then you go and that would actually be a great tool to have. Then you start outweighing. Is it worth the additional cost to have it?

--- *Purchase decision ends* ---

KIRBY

1:29:03 So maybe you don't accept it. But then on one hand or you just, you know, her in business, be nice to have access to all the tools, right? That would be the biggest difference. I think both your programs, is it comparing you with BuildOps right now? Which is what we're doing. Yeah. And you're both very strong definitely on the service management end of like a call coming in a client, everything like that. But that's probably the biggest difference I see is just, you know, creepage costs. I guess you could call it of, you know, where we had at the end of the year, if we're having to use you for support. Does that just keep getting more and more expensive? And what's happened in the past is we may be pulled back a little bit on reaching out for support because the costs are creeping right? Which we don't want to get to. We want to be able to just, you know, I wanted to be digging into the program as much as they can so that we get everything out of the program as opposed to sort of, you know, being cheapish because of costs, right?

BROOKE

1:30:09 Yeah.

ANNA

1:30:10 And just to clarify, right, technical support is part of the subscription, right? We don't charge extra for that, right? We do, as I mentioned earlier, have a professional services team but those are more for like technology, special projects, right? But we, you know, we have other products because them in to itself is its own product, right? And it has its own robust set of functionality and features that not all of our customers need. So we don't go the all in one kind of functionality one because your service operations, one is a beast, right? And that's where service trade comes in. But like any piece of technology... you get out of it, what you put in, right? So a lot of our customers are on our lowest level subscription. We've helped their business grow but that's all the companies is interested in putting in whereas we have very sophisticated customers with hyper growth plans and their strategies to utilize technology to optimize, right? Their operation. They're the ones who are kinda going all in, right? But it's also one of the reasons we have our open API. You don't have to buy more from us, right? Our customers choose to. And it's part of the reason I wanted to confirm what Brooke said that you guys know Andy from a he's, one of my favorite customers. Him and Ross, they, I told Brooke right before we got on the call, Russ offered me a job if I wanted to move to British columbia because I was, I saw something about the food scene in British columbia. He's like, yeah, if you wanna come on over but they've been customers of ours for 2017. So, and they have opted to purchase more from us but they can tell you what it's like to, with us as partners, right? And that's why our customers stay with us for the long haul. And that's you know, that's kind of all I could say about that is we're not gonna do an all in one because if we did and we developed the way we did, you know, everyone's price would just go up versus, hey, if you need more, we wanna provide more value to you?

--- *Purchase decision* ---

KIRBY

1:32:42 Yeah, no, absolutely.

ANNA

1:32:45 So, was there other than the pricing model, was there anything you saw from BuildOps or, I know you guys looked at a couple of other competitors that you rolled out that you're really hoping that we could accomplish.

TYLER

1:33:00 And...

KIRBY

1:33:01 I think, you know, I.

KIRBY

1:33:04 I've gotta dig in with Tyler and curvy, and sort of see what we, I mean, a lot of it with Tyler. He's the service manager. He's got better clarity on the two programs and then, you know, how to integrate into his team, but.

TYLER

1:33:20 But...

KIRBY

1:33:21 And Cody doesn't want to jump in and just remember that we've been stung once here absolutely, and we are just, we're really trying to flip over every look under every single rock and stone right now to make sure we have discovered. So we're not trying to, you know, I hope it's not too much of a painful experience especially for Brooke. She's been super helpful but, and I don't want to exhaust it to the point where, you know, you guys throw your hands up and just say we're impossible. We just need to know that what we're getting ourselves into is for the very much long term. We want this to be the last program.

--- Purchase decision ends ---

ANNA

1:34:01 Company, you know, I totally understand that. And unfortunately, it's a story we hear very often, right? I think that technology has grown a lot for the Construction side of the business but service, it's its own beast. A lot of people have tried to use like horizontal tools, but then you have to like customize and build and almost be like a software developer to make it work, right? And that's part of the reason why we are, we have in our mission statement that we are designed for commercial service contractors, right? Specifically the ones that are strategically focused on proactive work because that's what we were designed for from day one and we've continued to grow, right? I mean, if you came, if you guys were residential or fully Construction, right? Or initial conversation would have been just that the whole conversation. But unfortunately across all of our customers... technology has not been nice to commercial service contractors. And so I hear all the time over promise under deliver... being burnt by multiple pieces of technology. And that's what we try to avoid, right? That's kind of why when Cody you asked me about the reporting, I said, hey, in service trade, we have all the data. It's not visualized yet. Unless you are using a BI tool, then we can accommodate that and feed the data into it. We're actively working on that improvement. But the last thing I want is for you guys to come in and expect to have the nice visualization to make Tyler's job easy in that sense. And it not be there. That's why I mentioned the tasking because by the time you guys get implemented, I'm expecting tasking to be out and live, right? Or at least at very least in an early adopter stage so that you guys can get access to it and give us feedback. Okay. Right? That's really how we have developed our products is feedback from our customers and why we are. So, you know, quite frankly narrowly focused on the commercial service. And.

--- Dispatch ---

TYLER

1:36:35 Yeah.

KIRBY

1:36:37 It's yeah, it's a great product for sure. So I'm good.

ANNA

1:36:43 Any other general questions? I know Kirby you mentioned a couple of times you guys are looking for the long term, you know, relationship. I'm having an answer. Any questions about the company, you know, the.

KIRBY

1:36:58 We got some pretty good like with Brooke and Jack and Rick, sorry, with Tonya.

--- Purchase decision ---

KIRBY

1:37:06 I think, you know, again... I'm having enough information in my so now to go back and sit with Cody and Tyler and I think that's where it's gonna be. We, we're probably gonna go in and just compare notes and talk things through... and then just take it from there. That's where I'm at right now. I think I just want to go talk with Cody and Tyler.

KIRBY

1:37:29 Yeah.

ANNA

1:37:30 Yeah, that makes sense. I know the priority is getting it right? So you don't have to make the switch again, but did you guys have like a timeline that you were hopefully targeting?

KIRBY

1:37:45 We talk, but I know we cure mentioned us potentially going to Sage intact. So we have sort of looked at... which is the best fit to put in place first.

--- Accounting integrations ---

KIRBY

1:37:59 Obviously, we talked to Sage intact. I say put Sage intact in first. We talk to build the hub servers. They say put ServiceTrade in first, right? But I think it's more of, you know, the more information we get here, the more we just again, the biggest challenge we have with implementing these programs is stress it puts on the staff that are dealing with it.

--- Purchase decision ---

KIRBY

1:38:24 And I know, I mean, we're even there's people that don't even know were even talking about Sage intact because we're afraid of sort of the response they'll get at that point. So we're kinda just like Kirby said, flipping over every stone right now just to make sure that we don't... and that's where I think sort of the time frame is tough because are we ready to switch? Yes, but do we, which program did we put in place first? Do we even go with the Sage intact? We're still in that process of sort of betting that. So, yeah, there's a lot right now and we just wanna make sure we get it right? So we don't add UN needed stress to the company.

ANNA

1:39:08 Yeah. The one recommendation that I will put, I think the decision on, do you replace your accounting system or your service software is quite frankly only decision you can make, right? It depends on what's handcuffing the business the most, right? And so, you know, yes, I would always say, you know, get service trade first, but the reality is only you can make that decision. The one recommendation that I do make is do not implement both at the same time we have customers.

--- Purchase decision ends ---

KIRBY

1:39:39 Yeah.

ANNA

1:39:40 Yeah, we've had people try to overhaul it and it just kind of extends both implementations. It feels so definitely, you know, choose one or the other. And, you know, the way I usually look at it is what's inhibiting us the most? And let me handle that first and then knock it down.

--- Accounting integrations ---

KIRBY

1:40:02 Here's a question for you. And again, if we were to go with service trade first, does service trade help with the implement? Like what I know with, you know, with pro core? And then when we spoke to them, there's like contacts in that are in service trade? Would they then be able to Sage intact, be able to pull reports from service trade to get information into Sage intact, right?

--- Accounting ---

KIRBY

1:40:32 Like with Sage 300 Sage intact? What in discussions with them? It is a total new implementation. It's not like we just sort of are upgrading to Sage intact and come in the morning and we've just got a new, you know, screen and all the information moved over. It is a full blown implementation of a new program. But does Sage intact? I know you guys partner with Sage intact and our connector tool, can Sage intact pull information from service trade to help like contacts and just information like that to help with the implementation of Sage intact?

--- Accounting integrations ---

ANNA

1:41:12 Yeah. So you can definitely take kind of a bootstrapped approach, right? When you integrate the products, right? So once you get to an invoice stage, send it over, I'll have to double check. I know with our customers who have switched to like Quickbooks, which I think, you know, obviously you guys are way too big for and have the contraction side of your business that is something they use integration is okay.

--- Invoicing ---

ANNA

1:41:37 Cool. We'll continue to do the work in service trade. But as we're going to invoice, we'll push the invoice over and it'll create the new customer. I would want to double check with Tania that you can do the same thing, but that is like the customer data and the way it integrates it should be able to push information. The question is, does the integration create a new customer for you? My assumption is yes, but I just, I don't like to tell people and then be so, but I have had people who've done that with Quickbooks. I've said, hey, we're gonna keep the accounting system for longer.

--- Accounting ---

ANNA

1:42:17 We'll get service trade and then we'll start pushing that customer data over. You can export, you know, all your customer list, your equipment, lists and stuff from service trade at any point, which should help in terms with any implementation. But obviously, there's a lot more involved with accounting systems that I'm not, you know, an expert in?

--- Accounting ends ---

TYLER

1:42:42 No.

KIRBY

1:42:43 No, that's good. I got.

KIRBY

1:42:47 Sorry. Go ahead.

ANNA

1:42:48 No. Any other questions?

KIRBY

1:42:52 No, I think that's good. And if you do want to go back to any, because I mentioned Cody, you know, we talked about that we grow or behind us here, you know, again just a confirmation.

--- *Accounting integrations* ---

KIRBY

1:43:07 And just to be clear, we have basically, you know, in the middle of our, in the middle of our planning, we have the service intact tool program and then branched off of that like Cody said, we, you know, we've got pro for we have site, do we have, and we have written in service trade?

--- *Accounting* ---

KIRBY

1:43:31 So service trade, we start building your client based from service trade. All that historical data sits inside of service trade. And then we decide to change from stage 300 to service intact. Again, you're going to confirm whether or not all that historical data that sits inside of service trade can be pulled out of service trade into in to Sage intact.

--- *Accounting integrations* ---

ANNA

1:43:55 So you're asking specifically about all of the service history and stuff?

KIRBY

1:44:02 But with inside service, right?

KIRBY

1:44:05 Well, won't be the service history because that one live there, but I'm just thinking like contacts and that are there that's right? Because we always have to build that same contact. That same customer that sits in service trade is also going to be a customer that sits in Sage the accounting program.

--- *Accounting* ---

KIRBY

1:44:21 Will that information be able to be sent over or are we going to have to manually into those same customers in separately? Or can they use service trade as sort of? I don't know almost like a flash drive or something of information that can just be linked up because already is a connection tool between the two.

--- *Accounting ends* ---

KIRBY

1:44:40 And maybe they do that to say 300. I don't know. We just didn't get an answer from them on that.

ANNA

1:44:45 So that's what I was planning to ask Tania, specifically around your customers, your locations, your contacts, right?

KIRBY

1:44:53 Like the previous?

ANNA

1:44:53 Work history. I'm pretty sure that's a, no, you know, that may be something.

KIRBY

1:44:59 You track that anyway in your program? Yeah.

ANNA

1:45:03 That was gonna be my follow up question is what's the end goal of that, right? So, okay, cool. Thank you, curvy for clarifying, but specifically around your customer locations, contacts, things of that nature that's what I'm gonna confirm with Tonya. But again, you can export that into a CSV file to help, right? That's right at the bare minimum that, that's how, but I'll check on the integration.

KIRBY

1:45:35 Do it. Okay. You're late for your two 30?

KIRBY

1:45:39 I am.

ANNA

1:45:40 But I enjoyed this conversation. So on. So we leave.

KIRBY

1:45:47 Yes, we're gonna, yeah, we'll...

KIRBY

1:45:52 We'll be back in touch.

BROOKE

1:45:55 Okay. Before we go, when are you guys planning to have your conversations? And when should I expect to hear from you or?

KIRBY

1:46:01 We're gonna be talking in about one minute and you're gonna hear from us no later than this Friday broke? Okay. Thank you.

BROOKE

1:46:09 Sounds great. Well, thanks.

TYLER

1:46:10 Everyone.

KIRBY

1:46:11 Thank you.

TYLER

1:46:12 Thank you very much. Bye bye.

The End