



# ServiceTrade Demo with Twisted Mechanical

Harrison Miller with Twisted Mechanical  
Recorded on 8/17/22 via Zoom, 1 hour 3 min.

## Participants

### **SERVICETRADE**

Harrison Miller  
*Territory Manager*

Sean Jenkins  
*SDR*

### **TWISTED MECHANICAL**

Brittany Danielson  
*Director, Business Development*

### **OTHER**

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# Transcript

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

HARRISON

0:00 Hey, Brittany, how you doing today?

BRITTANY

0:03 I'm good. Can you hear me?

HARRISON

0:04 Yeah, can hear you. Fine. Can you hear me okay?

BRITTANY

0:07 I can. Sorry, I am in my car. I'm coming from a meeting and then, of course, we had something go bump in the night. So now I'm driving which is the equivalent to like an hour. So I apologize. I'm taking.

HARRISON

0:18 It's in the car, but, okay.

BRITTANY

0:22 To miss it. So I'm actually super glad you're recording it because then I can also maybe get the audio or video from you to show to Scott later on.

HARRISON

0:30 You can, maybe.

BRITTANY

0:30 Watch it tonight if we need to. But, yeah.

HARRISON

0:33 Yeah, absolutely. Yeah, yeah. Well, we'll do that. It's gonna be through Zoom. What I'll do is I will, you know, share my screen, walk you through it. Yeah. And it will record. So, you know, if you need to go back and look at certain aspects of it are, you know, pass it around the office and see who else needs to or wants to look at it. We could definitely do that.

BRITTANY

0:55 That's awesome. Thank you. Appreciate it.

HARRISON

0:57 Yeah, of course. And you guys have your out of Minnesota, correct? Yes.

BRITTANY

1:01 Yep. We are most sultans.

HARRISON

1:03 We are, we're based out of Raleigh, North Carolina. I don't know if you've ever been out this way before?

BRITTANY

1:10 No, it's on our bucket list, but it has also been put on the wait list. So.

HARRISON

1:16 Yeah. Hi. I gotcha. I was, I'm never really been to Minnesota. I was, a few weeks ago, took a trip out to Montana and so I was at the airport in Indianapolis, but that's about as far as I've gotten out there that.

BRITTANY

1:31 I recommend if you like humidity, you can come between June and August, if you like cold, you can come August to June.

HARRISON

1:39 Yeah, I was gonna say too if you'd like humidity definitely come down to North Carolina. It is absolutely insane these months or kind of brutal for me the older I get the less I like the hot weather to you. I think maybe I just liked it early on because I was in school. I don't like the heat. It doesn't do a whole lot for me anymore anyways. We'll we can go ahead and, you know, dive into this right here. You are the you're one of the like the co owners over there, correct?

BRITTANY

2:13 Yeah. Okay.

HARRISON

2:14 Okay, perfect. So quick introduction to myself. My name is Harrison Miller. I'm one of the territory managers here at service trade. Really, what I just wanted to do today is just walk you through service trade and, you know, see if it might be a good fit for you guys. So first thing I wanted to do is just, you know, have a little talk about, you know, type of work to do and current processes, maybe where you see some room for improvement, something like service trade might be able to help out with.

HARRISON

2:40 And then after that and we'll take a dive in the product. You know, if everything looks good, we can definitely discuss pricing what we think the best next steps should be that sound good with you? Works for me. Alright, perfect. So I have some notes from your conversation with Sean.

--- *Type of work* ---

HARRISON

2:57 Looks like you guys are four technicians doing all commercial work, doing a little bit of everything in terms of service, you know, preventative maintenance, you know, some one time service Installation. You know, most of your techs are doing a Installation. They're cross trained for service as well. Yep having a little trouble with the software.

--- *Invoicing* ---

HARRISON

3:20 So, I know you're on Quickbooks. We have a great integration with Quickbooks. I'll go ahead and say that, but it looks like your own service site and then Java and then BuildOps, and then back to Java. Does all that sound right? Yeah.

BRITTANY

3:33 Yeah. Well, we would set as service BuildOps, jogger.

--- *Paper process* ---

HARRISON

3:39 Okay. Cool. Yeah. So I mean, I guess, you know, passing that might get rid of you. You're the one that requested to learn a little bit more about us. I mean, what has you interested in checking out service trade?

BRITTANY

3:54 Right now, honestly, we are just, we're struggling with a couple of different aspects of the job at and most of the things are, we are really big, really fast. We used to be a mom and pop shop literal mom and pop shop where Scott did all the work and I don't know paper that was really easy when we got bigger and we got corporate accounts that's where things start to get a little fuzzy. We've been doing a larger jobs which involves lots appeals, lots of product, lots of labor, multiple people, multiple visits. So it's not as easy to track. And it's frustrating to not know exactly like are we making money? And right now, the way that the industry is everything's where everyone's rates are going up our rates, not quite not fast enough or we actually making money. Are we losing money?

--- *Paper process ends* ---

BRITTANY

4:37 Are we, is our company going to be successful now? Six months, six years, all that stuff. And we can't really track right now. We also have technicians that are going that don't come home to our house. So, what used to be my husband and my son going and running jobs? I'm coming home, going, this is what I did today. At the dinner table. We're don't have that anymore. So then we are like, did we Bill for that job? Have we've been there? Why are these people like us so much? Because we haven't heard charge them those things we need to like rain in. So that again, we can be successful now six months and six years from now. So that's kind of like where we're at right now. I have no way to track. We have a bunch of lines of credit at different vendors. I have no way to track deals. The guys can go and run a po. And then, you know, six two seven business days later, I get an invoice and I'm going, I don't know why you bought this or what it's for. So then again, I don't know if I'm making money on the job or it's all just going into like a slush fund. We're not really actually allocating any of our income the correct way. And yeah, that's a big one. So it's time management, make sure that it's being put on the right job like time allocation pillows... and then being able to keep all the information like I have no idea what equipment is where.

--- *Assets* ---

BRITTANY

6:00 So when we do a plant maintenance, the guys like this is old and I'm like, well, what have we done on it? We have no history of equipment. We have no, model serial numbers. We have no plans for layouts of buildings and stuff like that, and just be able to take, you know, photos and putting that under customers, and then also put it in under specific jobs to kinda just keep track of all of the things that we're doing and look professional through our customer.

--- *Type of work* ---

HARRISON

6:25 Would be...

BRITTANY

6:26 Fantastic.

HARRISON

6:28 Yeah. So all of that's really good. And I'll just go ahead and say, I think you're in the right place, if that's what you're looking for, you know, with us being geared more specifically for commercial, you know, that stuff that's going to be right up our alley way, right?

--- *Paper process* ---

HARRISON

6:45 You know, being able to provide you guys, you know, clear visibility of, you know, what's going on out in the field, you know, what happened last time we were out there? What happened, you know, three years ago once we were out there. So, you know, your guys, you know, not having to call into the office, you know, trying to

figure this out, wasting their day, you know, wasting your time, you know, being able to provide that, being able to provide those pictures is going to be huge as well, you know, and for our commercial contract is, you know, one of the biggest sources of revenue is going to be able, you know, for those or opportunities that you're doing, you know, you got there to do like a permit preventative maintenance job.

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

HARRISON

7:23 And hey, we found something else while we were out there, you know, being able to provide your customer, you know, exactly what happened, you know, take that multimedia. Yeah, attach that to the quote, get those quotes, you know, approved faster, you know, get those invoices out faster as well.

--- Customer engagement ---

HARRISON

7:38 But we did a study pretty recently and I think it was the quotes that had, you know, like two or more pictures on it. They're getting approved at like, you know, 30 to 40 percent faster. So, you know, the quicker we're able to get those out, the more information we're able to provide.

--- Type of work ---

HARRISON

7:54 Really just the more money that's going to be in your pocket... and, you know, it isn't is not a knock on, you know, platforms like job or, and service tightened. You know, they're good at what they do, but they're good for the residential side, right? You know, it's one of those things, you know, a lot of these platforms try to, you know, for each, you know, and I'll be in an all in one system. The problem with that is a lot of times, you know, they can do a lot of stuff, but are they really that good at it and the answers? You know, no, not really. I mean, just being completely honest, you know, whenever you're focusing with the service trade, something that's more, you know, geared specifically towards commercial.

--- Paper process ---

HARRISON

8:34 Yeah, we might be a little more niche but, you know, we can focus exactly on, you know, this typical problems that you guys are having also saw on the notes, you know, a big problem that you guys are running into probably from your end, if you're doing a lot of the paperwork is double data entry on your end, you know, in terms of like the invoicing and quoting and things like that. Yeah. Yeah. And that's a big problem you guys are running into?

--- Paper process ends ---

BRITTANY



9:00 Well, the, so I don't know if you know a lot about Java but jogger is something where they go, you can put a request and then you can put a quote and then you can turn into a job and then you can turn into an invoice. There is no going backwards. So like we have to put in a request for a service call for the initial visit so that they can, if we need to have a quote, we can make a call. Hold on. I'm just gonna pull that up really quick. I gotta.

HARRISON

9:26 Okay.

BRITTANY

9:26 Well, sorry, I apologize.

HARRISON

9:29 No, no worries.

BRITTANY

9:33 Give me... I'll be right back. Hold on one second, please.

HARRISON

9:38 Good.

BRITTANY

9:57 So, you to entertain them while I was, that... I got my seven year old with me too, so.

HARRISON

10:03 Nice.

BRITTANY

10:06 Do it all the things.

HARRISON

10:07 Yeah. Well, they can learn a little bit about service trade too.

BRITTANY

10:14 Yeah. What was I gonna say? So wherever we had, I apologize.

HARRISON

10:20 No, you're good. We were talking about quoting, yeah, you're saying it's a little difficult to do it at a Java.

BRITTANY

10:26 Yes. So, the issue or right into is that like they'd have to take a request which we can't put time on and that's how we would have to start that's like, okay, well, that's cool. But it doesn't really matter to us because we, it's not, we need to be able too. We couldn't put time on it. And then it was like, well, now you can do it, but there's a possibility that you might need a quote. You have to do it this way. Okay? So then you had to do it that way but we were having to like the guys had to do like a stop watch... and it was like, well, okay. So that's fine. But the stop watch will go away. So, if I didn't log into jobber that night and see when they started and stopped a stop watch. I lost their time for that request.

HARRISON

11:12 Gosh, I say that, and then you just kind of guessing at that point?

*--- Tech time tracking ---*

BRITTANY

11:15 I have no idea at the guys were gone for eight hours and I'm going to assume if they took three calls that they were doing it for the even amount of time. Sure, well, that's how you do payroll, that's...

HARRISON

11:25 You do?

BRITTANY

11:27 Billing. And so I was like trying to guess on when these guys were actually doing work and how long they were doing work for, and it was just one thing after another.

*--- Quoting ---*

BRITTANY

11:34 Then it turned into, okay, well, I don't need a quote so that I'd have to convert it to a quote, then cancel the call that converted into a job, then close the job and then generate an invoice. I'll just do one thing, right? This is ridiculous. And then if I turned to a job right away, and also, it was like you need a quote.

*--- Quoting ends ---*

BRITTANY

11:51 I'm like, well, now I have to make a separate calls and I have two jobs for the same job in my software. I have to send to bills to my customer. I have to cancel it out. So then none of my numbers make sense.

HARRISON

12:04 Right. Yeah, that seems about like 15, you know, unnecessary steps.

*--- Tech time tracking ---*

HARRISON

12:09 And... to be completely honest with you, I, that seems about 10 times more complicated than what it really needs to be.

BRITTANY

12:17 I apologize. Yes.

HARRISON

12:20 Yes. So, we also, we have a really good system as well. You know, to track your employees. You know, they can clock in, clock out, you know, in route, how long are they spending? Go into the job sites? You know, once they're actually on the job site, how long are they spending their, you know, even stuff like job preparation? You know, they had to go somewhere beforehand and, you know, pick up items or equipment or anything like that. We can track that as well. And you'll have access to all that information. So just makes that payroll aspect a lot simpler for you.

--- Purchase decision ---

BRITTANY

12:52 Okay.

HARRISON

12:53 Cool. So definitely seems like there's a lot of stuff on our end that we're going to be able to help you guys, you know, clean up. So, I know you reached out to us. I mean, I'm sure you've been thinking about this a little bit. Did you have a timeline on when you wanted to get something like this setup?

--- Type of work ---

BRITTANY

13:10 Yesterday?

HARRISON

13:11 Yeah. Okay.

BRITTANY

13:14 Need to figure something out because right now, it's just a disaster. We're using wait 20... two companies have them as an H back company. One of them is the fabrication company, fabrication companies more on the manufacturing side. So, I don't know if you guys would be a good niche for it just because we're not doing as much stuff. It's more like project management just because we're building things and sending it out as like a vendor versus a contractor. But I kinda wanted to see like if this is, you know, this is obviously very more focused towards the H, back side of our world. I wanted to see if it would work.

--- Type of work ends ---

BRITTANY

13:52 And then as that's a possibility like while this might actually work for the other company as well, we might go back and started up for that one. But I really need... on the H fact side. So that would be like urgent, get it done started right now and possibly another company a little bit later on in the future.

--- Type of work ---

HARRISON

14:13 Okay. For those projects, how long are they typically last thing for you guys?

BRITTANY

14:19 We give it a five day?

HARRISON

14:21 Okay. I mean for projects like that, you know, we definitely are going to be geared more for that service side, but, you know, in terms of that, we definitely would have some aspects. I can help you out with that project management as well. And I'll show you some stuff on that... but no, I completely agree, you know, the service should be the main priority and it may be one of those things where, you know, you love it for the service side.

--- Type of work ends ---

HARRISON

14:47 Hey let's get a setup for this, you know, maybe if it's working well, you know, down the road, we might be able to add some, you know, project management aspect to it as well. But yeah, well, we can.

BRITTANY

15:02 To other sometime. Nice from them. But it does that. They're like two separate accounts to separate Quickbooks. Two separate LLC is two separate everything. So they wouldn't really like we would have to buy a whole nother software program just for that or fabrication part of it.

HARRISON

15:18 Okay. Yeah, cool. No worries. Did you have with 14? Did you have a budget in mind? You're looking to spend on something like this as well.

BRITTANY

15:27 No. Our main concern is I don't care how much it costs. I just need to work. I don't need like all the bells and whistles, but I do need something that can quote that can invoice that can track time that can track purchase orders, can track customers, contract service calls that I need that. So whatever though.

HARRISON

15:51 Yeah.

BRITTANY

15:51 Well, that's all like Microsoft everything we need, then that's what it costs and that's what we get.

HARRISON

15:56 Okay, perfect. What do you guys have in for text? Then? I'm gonna walk you through like our base package. And I think with this stuff you're looking for it's going to cover everything plus more. And, you know, there's anything else, you know, down the line, you know, hey, maybe we want this, we want this, we can, you know, add that down the road, but I'm gonna walkthrough the base package. But before we dive into this, is there any other questions you had or anything else you wanted to see?

BRITTANY

16:25 I don't... think so.

HARRISON

16:29 Okay. Cool. Well, let's dive into this thing here. I'm gonna share my screen with you.

HARRISON

16:40 Can, can you see that? Okay, should be like a powerpoint slide?

BRITTANY

16:45 Yes, yes.

HARRISON

16:47 Perfect. I'm gonna read you off a couple of slides before we actually walked through service trade just so you know, a little bit about us. You know, where we come from, who were working with and stuff say, you know, we're not just some random company but what we've been around since about 2012. So, you know, 10 years now we're working with just under a 1,000 commercial contractors in North America. So people kinda close to you guys, cool refrigeration or read out. And if you're familiar with them past couple of years have been pretty good years for us. You know, our customers have generated about 7,000,000 work orders table a little under 7,000,000,000 dollars with the help of service trade. Our mission has just always been own delivering business outcomes for our customers. So helping commercial contractors like yourself, you know, be more valuable to your customers. Past couple of years in particular have really been boom years for our mechanical commercial contractors, this code years where we did a study pretty recently and we found that the mechanical industry has grown by about 50 percent since the start of 2020. So really just me as fast growth is going to be the standard. You know, you guys are growing. I'm sure you understand that as well. So what we wanna do is just help you guys do that. So there's a few key takeaways that we've noticed that our top performing companies are doing with the help of service trade. The first of this is just going to be operating efficiently. We're very aware that there's a skilled labor

shortage in the market. I know you're probably more aware than we are. So being able to get the most out of those resources that you do have is going to be absolutely critical.

--- Paper process ---

HARRISON

18:19 So one way we're going to help out with this is be able to fit more appointments in a day for you guys. So your technicians are going to be spending less time driving around more time doing more billable work. We also wanna make sure that you have all this information from the field back into the office in real time so we can eliminate some of that double data entry.

--- Customer engagement ---

HARRISON

18:38 You know, that copy and pasting on your end. You know, we wanna make this office work as seamless as possible. You know, for your company, second way is just is going to be by attracting and retaining the best customers. These are going to be those guys to trust the work that you do, you know, aren't gonna hassle you about the pricing just because they already set, understand the value that your company brings to them. You know, this is really important because our research is showing that you're earning more revenue per customer, as opposed to performing, you know, high volumes of a lot of low value work is going to be associated with about three times faster growth. So just being able to keep those same customers coming in and then lastly turning more repair opportunities into revenue. When we look at our top performing companies, you know, how they're reporting these deficiencies is probably the most significant thing that they're doing to drive revenue. So, you know, essentially what we wanna do is just make this as easy as possible for you guys, you out in the field, being able to log deficiencies and then be able to get this back into the office in real time.

--- Customer engagement ends ---

HARRISON

19:40 So, you know, just given you guys more tools, more processes in place to give you guys some more at bats. That is a little bit about us. Any questions on that before we actually dive into the tool?

BRITTANY

19:58 So.

HARRISON

19:59 Okay, cool.

BRITTANY

20:01 Can you hear me? Okay, I'm going to go in and out a little bit. This is kind of a sketchy area. But so I apologize, but I can hear you.

HARRISON

20:08 Yeah, no, no worries. That happens. That's completely fine. Like I said, this is going to be recorded. So, you know, anything you think you might have missed out on, you know, I'll send this over to you and we can look over it tonight. But cool. So we're in service trade.

--- Access to information ---

HARRISON

20:22 Now, there's gonna be three core views of service trade. We're going to have the view from the office. We're gonna have the view from your technician out in the field. And then we're going to have the view from your customer as well. But we're going to start right here in the office.

--- Recurring maintenance ---

HARRISON

20:35 This is a work order that I created or a job. You'll kinda here's users to terms pretty interchangeably but up here at the top, you'll see pretty much all the important information that you'd expect. So up here, you know, the address that we're working on, the address that we're going to be billing too, and then the contact information, you know, for the owner or the person on site, whatever that may be.

--- Quote templates ---

HARRISON

20:59 We go down here into appointments. It's going to give us a summary of, you know, what, while we're out in the, what exactly are we doing while we're out there? What piece of equipment or are we working on estimated pricing, estimated duration, go right here into our parts, laboring, items, you know, what parts, what items are going to be needed to complete this job? Because this is a recurring job, you know, all the parts, all the labor, you know, all the items, all the pricing. They're going to be loaded in from a template. So you're not gonna have to go in here and manually type this out every single time that you do this.

--- Tech On-site ---

HARRISON

21:36 They just saving some time on your end scheduling these jobs, any clock events? So we're able to track your technicians in three different ways. We have inner out we have onsite. And then we have job rep. So from the mobile app, whenever you technician logs into one of these, you know, clock in clock out, we're able to track exactly how long they spent doing each one of these and where they are whenever they clocked in and clocked out... the asset or the piece of equipment that we're working on.

--- Assets ---

HARRISON

22:02 This is just going to provide, you know, more a higher level, hello detail of, you know, exactly what are we working on, you know, just to provide, you know, more clear visibility, any comments. So this is going to be visible to you guys that, to your guys out in the field as well. You know, just little notes to help them, you know, more easily. Complete the job. So, you know, like they need you to bring the total latter or if you wanted to include like a long code or gate code or something like that. So they're not having to call back in the office trying to figure out, you know, what exactly are we supposed to be doing? And then lastly any attachments. This is just my demo account. So I don't have anything added to it. But if you guys wanted to include like a diagram, you know, a map, anything like that, it's gonna be visible to your guys out in the field, you know, just to help them, you know, complete the job a little bit easier. You know, they're not having to call into you. Hey, how do we fix this piece of equipment right here? You know, we can include the instructions on that right there. Any questions on this work order so far?

BRITTANY

23:07 I don't think so. I think, I mean, it looks pretty self explanatory, it's pretty much the one that you see fit around the Florida, every kind of platform, so, but it's really clean and that kind of makes sense.

--- Access to information ---

BRITTANY

23:19 So... I'll definitely look at it in more detail later tonight when I can Zoom in a little bit, take a peek at it.

HARRISON

23:28 Yeah, absolutely. So we will go out here into the technician view. This is the view from our mobile app. It's going to be compatible with any apple, any android products.

--- Tech On-site ---

HARRISON

23:39 It doesn't really matter. Let me the same view. As I mentioned, there's gonna be three o'clock events we have onsite in route. And then job rep, as a technician, you know, among the way to the job, I can go ahead and click into in route and I'll go ahead and clock into that. I can also notify my customer of my expected arrival time. So it's 1,220. Let's just say I'm going to be there at 1,225. I can push an email notification as well as a picture of the technician. So your customer knows who to expect and when to expect them. So I'll go ahead and send that notification pretty quick trip today. So, you know, we're at the job site. I'll go ahead and clock out and it's going to automatically ask him I want to go ahead and clock in to be an onsite soccer. Okay on that.

HARRISON



24:26 Put multiple, do not disturb really with no additional administrative work. You're with no additional administrative work, your technician is going to be able to see pretty much all the information that they need to be able to do this job pretty accurately and effectively. So if you click right here and the services, we can see what services are they there to perform?

--- Assets ---

HARRISON

24:50 What piece of equipment or we're working on, you know, estimated price, estimated duration. We go right here into our assets. This is going to let us know, you know, what piece of equipment are we working on. We can go into here and, you know, provide just a higher level of detail if we wanted to see our service history.

--- Tech On-site ---

HARRISON

25:10 So we know exactly what happened the last time we were out here. You know, two years ago, what's we're out here. So yeah, we're not having to call back into the office, trying to figure this information out... there right here into job items, you know, any parts, any labor, you know, any items that are going to be necessary to complete this job.

--- Access to information ---

HARRISON

25:30 Your technician is going to be able to view from this from the mobile app as well. So well. They needed to add anything. They could just go into here and just add, you know, whatever part that they might need to complete the job. So we can do this straight from the mobile app.

--- Customer engagement ---

HARRISON

25:45 But, you know, as I mentioned, and in terms of where mechanical contractors, you know... and in terms of them grow in this revenue, you know, one of the biggest drivers is going to be the ability to act on the pull through revenue. Essentially, what this means is the percentage of your work orders that are going to result in an approved repair.

--- Deficiencies ---

HARRISON

26:04 So we can click right here into the efficiencies and we can see, you know, me deficiency, any repair opportunity that's ever been found at this location right here. But let's just say we're out here and we find some sort of prepare opportunity, right? Service trade. Makes it really simple for our technician out in the field just to go ahead and log this would just click, add the efficiency. It's gonna ask us to add a brief

description of the problem. You know, we're working on HP AC unit. We'll just say there is a broken compressor... don't have to be too detailed on this just because, you know, we found it a lot easier. It's a lot more effective just to go ahead and, you know, add some multimedia. So if we wanted to, you know, take a picture of what was found. We can add that to it or if we wanted to, you know, take a video recording, audio memo, you know, hey, I'm out. Here at the planet fitness, working on HB AC unit, I found the broken compressor. I'm gonna need XY and Z part. It's gonna take me an extra hour to finish so we can go ahead and add this audio memo to it before we go ahead and log this deficiency and attach it to the work order. It's gonna prompt your technician to answer a few more questions first to mark the severity of the deficiency that was found. You know, we'll say it's an operable. We need to fix it right now after that, is, can ask us to select and associated asset, you know, what piece of equipment already working on just so we can go ahead and keep building that service history for the next time that we come out there. So we're tied it back to the HP AC unit will say it's a new deficiency and we'll go ahead and save it anytime out in the field. Your technician has discovered you need efficiency. The office is going to be notified in real time that something was found. Kinda talked a lot right there. Just kinda wanted to grab your thoughts on the mobile app so far.

*--- Access to information ---*

BRITTANY

27:56 I actually really like mobile app. I liked the fact that the guys can notify if we want to, because there are some customers that like to know who's coming in especially like schools and stuff like that. I like that. I mean, it looks like it's pretty clean to read. Everything is cloud based, right? So everything is saved like we don't have to have a software to backup or like a hard drive where thing or like that to back everything up, right?

HARRISON

28:21 Yeah, it's going to be cloud based?

BRITTANY

28:23 Okay, perfect. And you said it was android and apple?

HARRISON

28:27 Yes, ma'am. So it's gonna be compatible on both. You know, you don't have to, you know, go by your guy tablets or anything. You know, I just use my iPhone is always work completely fine for me.

BRITTANY

28:41 Okay. So, okay. That was my next question because I do know that some of them say that, yes, you can use it on your phone but a tablet is better. So you'd it actually is just clear as day on an app on the phone as well. That's nice.

HARRISON

28:53 Yes, ma'am. Yeah, yeah. You're looking at this through my cell phone, I didn't go buy a tablet or anything to do these on. It's. Always work perfectly fine for me.

BRITTANY

29:02 Hello? Okay. Good to know. Yes, so good. So far. So good.

HARRISON

29:06 Cool. Cool. And I always like to ask, do you know, and in terms of, you know, new technology, a lot of times, what I hear is, you know, the guys out in the field, they're gonna think it's going to be too complicated in terms of ease of use. Does this seem pretty easy to use from a, you know, field perspective?

BRITTANY

29:21 Yeah, it does. And do you guys have different levels of like what they can see? So like let's say that Scott goes out in the field and he's an admin, can he edit more on the app then like our service technician, just like regular Joe or whatever, who maybe doesn't have access to like the ability, you know, the coding and stuff like that. Do you guys have different levels that they could see?

--- Access to information ends ---

HARRISON

29:45 Absolutely. So I was going to bring that up as well, so that's something we can turn on and off, you know, just on like a per customer per user basis, you know, typically and I'm sure, you agree, you know, the guys out in the field, they're good at what they do.

--- Access to information ---

HARRISON

30:01 We don't really want them handling, you know, the billing stuff, but, you know, if you had, you know, a more experienced guys, somebody you felt comfortable quoting and invoicing, we could definitely turn these features on, you know, just for specific people.

BRITTANY

30:14 Okay. And then do, but does the office staff have access to the app or is that just technicians?

HARRISON

30:21 So, and in terms of the office staff, you're going to be able to have any, anybody the most use the app or that service trade from the office perspective can definitely do it. But the way we do our license is by the number of people out in the field that are using it. So you would have to buy another license if you want us to mind the office to be able to use the mobile app.

BRITTANY

30:49 Okay. Alright. That's fine. I just didn't know if, like if we have to, if the office staff and they would be considered a technician, if they have the app, correct? Yes,

ma'am, perfect. That's fine. We can just have an office out.

HARRISON

31:03 Yeah, exactly. And like I said, in the office, you can have anybody that you want unlimited people can use that. So no worries on that. Cool. Perfect. Cool. So I'm gonna go back into the office. You know, like I was saying, anytime your technician find something out in the field, you guys are going to be notified in real time that something was found.

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

HARRISON

31:22 So if we go right here back into our work quarter, now, we have a deficiency logged in, click into this right here.

HARRISON

31:33 What sharing my screen on accident?

*--- Deficiencies ---*

HARRISON

31:42 Cool. Alright. Can you still see that? Okay?

BRITTANY

31:47 Yeah, yep. Okay.

HARRISON

31:49 Cool. Yeah, accidentally click stop Sharon. So what this is gonna do is it's gonna take us to this deficiency board. What this is gonna do is it's gonna tell us no, what was found, what job, where we, at once, we found it, you know, as well as what technician out in the field. So just be on provide, you know, a higher level of detail of everything that's going on. It's also gonna include the attachments, the multimedia that our technician took out in the field as well as any related deficiencies that kinda go along with this job just so that we're making the right recommendations to our customers, right? If we keep running into the same problem on the same job site, you know, hey, maybe it's time to take a deeper look at this. You know, the last three times we've been out here, keep finding a broken compressor. But from here, what makes it super simple just to go ahead and quoted out to your customer? We can just click, add the quote and then create a quote. It's gonna take us to this quote page right here. So it's going to have details about whatever deficiency you found. You know, the multimedia are now gonna flow really easily from the field to the office and then finally to your customer.

*--- Quote templates ---*

HARRISON

32:59 And if it's a problem that you guys are probably running into pretty regularly, we can apply a quote template to it as well. You know, what to say broken... let me find one that has a lot of.

HARRISON

33:18 I just use this one right here. Yeah. So, you know, we could include your guys, his own verbiage. So you're not having to go in there, any of manually type that out every single time you, you're doing a quote on something that, you know, you're running into pretty frequently. So your guys, his own verbiage that standard parts labor in items are now going to be included on here as well. And we can just add these items to the quote. You know, obviously you can go in and edit these if you need to or, you know, change the quantity on something, you know, on a, you know, one off basis. But we can just go ahead and do this and save you some time back in the office... from here.

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

HARRISON

33:52 All you would have to do is just click send to the customer. So you could see our verbiage is going to be loaded in, you know, the pricing as well as the multimedia is going to be included on this quote as well. So the sure, the audio minimum, you know, we can play with the, or toggle with these as well. If we want to, you know, let's just say for the audio message, there's absolutely no telling what our technician was saying out in the field. Maybe we don't want our customer here in that. We can just, we can go ahead and toggle this off so it's still be visible to you guys in the office, but your customers not going to be able to see that. So what I'm gonna do is I'm gonna send you over this quote so you have access to it, you can take a look at it. I know you're driving. So I'm not gonna ask you to go to your email and pull it up but I'm gonna pull it up on my end, this is what the quote would look like. You know, from your customers perspective, whenever they receive a quote from you through service trade, we look in the top left hand corner right here. This is just our demo logo, but we'd be able to put your guys, his own custom logo on each and every one of these just given, you know, a more uniform look on everything that's going out.

--- Customer engagement ---

HARRISON

35:02 You know, your verbiage is parts labor in items are multi media, you know, like I was saying earlier, those quotes and invoices that have pictures on them. They're getting approved and, you know, getting money in your pocket a lot faster just because it's providing a more clear visibility of what's happening.

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

HARRISON

35:19 Something really cool too is in the top right hand corner. We have this big green approve button which is just gonna give your customers the ability just to go ahead and approve the quote straight from the email that we sent out. So... now I can just go ahead and approve it straight from here. Yeah, just save and some of that time, you know, get these quotes approved faster.

--- Quoting ---

BRITTANY

35:40 Does that, does that alert us like be it, does it alert the person that sent it or like, does it send it? Like how does the office find out if someone approved it online?

HARRISON

35:51 Absolutely great question. So, you're going to be notified anytime that a customer interacts with the quote, is going to send you over an email, you know, hey, so, and so viewed this quote. Yeah. So, and so I clicked on this link in the quote. So, and so approve the quote, right? So let me approve it from my end.

BRITTANY

36:11 And then when we send out the quotes, like if I send out as a quote to a customer, will it saved from Twisted mechanical or will it saved from Brittany? And like what's the email that comes out that's...

--- Quoting ends ---

HARRISON

36:25 That's a good question I'm gonna say because I sent it out. It's gonna come from you because I just sent this one and it says Harrison dot Miller at service trade dotcom. So I'm gonna say it probably send it directly from your email, but I would also imagine that that's something that you don't won't. We can certainly change this features for you.

BRITTANY

36:44 No, that's totally fine. I'm just wondering what it looks like. So it looks like it's from service trade, national reply, plus F 97 at service trade dot calm. But then it says reply to, with your email, okay?

HARRISON

36:56 Yeah.

BRITTANY

36:57 Perfect.

HARRISON

36:58 Yup. Yup. And then kind of going back to your question right there, this is going to be the quote history.

--- Quoting ---

HARRISON

37:03 So, you know, any time that someone views a quote, you're going to be able to see it on the quote history. So, you know, maybe somebody, you know, send out a quote a week ago. Somebody viewed at six or seven times, but they haven't approved it yet. You know, hey, maybe it's time we reach out to them or, you know, see what's going on. So just being able to provide just clear visibility, you know, of all the interactions with this quote.

BRITTANY

37:26 Okay, perfect.

HARRISON

37:28 In terms of quoting, you know, typically, whenever you guys send out quotes, how long is it taking for those to get approved?

BRITTANY

37:35 You like, hey, it depends on the urgency. Usually we hear back within like 24 to 48 hours. If it's not like a real urgent call, then I guess it wouldn't be as... it's if it's not like a nine one one emergency to fix than it usually takes a little bit longer but not too bad.

HARRISON

37:56 Okay. And then in terms of those quotes to, you know, because what we're going to be really good at is tracking those quotes, right? You know, who viewed it but hasn't approved yet? Did you have a lot of quotes are kind of slipping through the cracks as well?

BRITTANY

38:11 I think that we have, sometimes, I think sometimes we forget that there's a quote that's out there that we need to also have in there. So I just wanna make sure that we're not losing it. Yeah, sometimes happens.

HARRISON

38:27 Yeah. Well, let me show you this real quick. So if we go right here to our quote page, we can go right here into the quote status and we can play around with this. But let's just say, I wanna see my quotes that have been submitted and viewed, but it hasn't been approved yet. I could just run a report on that and you'll be able to see every single one of them. They've been viewed just hasn't been approved yet, you know, hopefully this is just my demo account. Hopefully, you'll have as many as I do, but what we could do is, you know, we could books and all of them. So put it back to the top of those guys, his inbox, or we could just do one off emails, you know, say, hey, I want to follow up with this guy and this guy right here and I could just send these quotes back out to them. I'm just kinda recirculating top of the inbox, keep it top of mind with them.

BRITTANY

39:13 Sure. Sure.

HARRISON

39:15 We, we can definitely do that as well in terms of the quoting. How do you think your customers would respond to the?

BRITTANY

39:21 I think they would appreciate it. I mean, I know that we have one that has done some online approval. So I think it's always, you know, when, if we could do that quickly and just not have it be emailing back and forth and doing all that stuff constantly. So, I think they'll be kinda nice.

*--- Access to information ---*

HARRISON

39:37 Okay, perfect. Cool. Well, any more questions on the quotes before I go back out to the mobile app and finish it up there?

BRITTANY

39:49 No, I don't think so.

HARRISON

39:51 Okay, cool. So I'm gonna go back out to our mobile app. Like I say, we completed the work order that we found our deficiency.

*--- Type of work ---*

HARRISON

39:59 Only really thing to do now is just go ahead and clock out before I do that. Do you guys have like, you know, like maintenance forums, maintenance agreements or anything like that?

BRITTANY

40:10 Yeah, we do, we have some for a plan maintenance. Is that we have the checklist that we want the guys to go over. And then we do have contracts that we send out to our customers.

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

HARRISON

40:19 Okay. Gotcha. And I'm assuming there's probably just a white paper.

BRITTANY

40:25 Yeah, right now, well, they're just, yeah, they're spreadsheets that we've made and stuff like that like PDF. So whatever that we send out or, yeah.



HARRISON

40:33 Yeah, cool. So what we'd be able to do for that is if we go right here and give you more details... and I can go right here into my download blank paperwork.

--- *Forms* ---

HARRISON

40:45 This would be your guys is spreadsheets. But essentially, what we could do is we could generate this blank paperwork and we can turn those excel sheets and available PDF. So literally all your technician has to do is just, you know, click, you know, check off the boxes, you know, maybe like locations, customer information, parts, labor items, you know, what, whatever kinds of information that you're looking to send out on the syllable PDF. But yeah, we could just turn that into just like a quick for your technician out in the field.

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

BRITTANY

41:17 Okay.

HARRISON

41:19 What do you think you guys would see that pretty valuable?

BRITTANY

41:22 I think it'll be a lot easier for them to be able to just get it done completely if they are able to access that they have.

HARRISON

41:28 Okay, cool. Yeah. So we can definitely do that. One last question before I clock out it here is, do you guys collect signatures? You know, from like the onsite contact out in the field.

--- *Access to information* ---

BRITTANY

41:42 We do not, at this time. We don't really have the need to do that. We have one customer that asks us to do that, but they have their own app that our technicians have to log in and log out of this call for their work. So that one we don't have as an, a requirement right now, but maybe down the line, they might need it.

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

HARRISON

42:00 Sure. Sure. So I will say what we do have that option, I won't go into it if that's not something you do it now, but if that's something down the road you're looking to,

do, we always have the option just to go ahead and collect those signatures. But from here, all we really need to do is just go ahead and clock out. It's gonna ask us to do like, you know, one little one, last completed checklist, make sure we finished everything. So click into that. It's going to ask is, are we done with the visit? You know, if it's a multi day project, we could say no on that, but if we're done, would you say yes and we'll finish, will clock out and then we're done, you know, in terms of the mobile app. So last thing, let me... go back to my job. So we'll go back into this work order right here. You know, as you can see now clock events, we can see exactly, you know, how long your technician spent, you know, on the way to the job, you know, actually working on the job. And we can also see where they are whenever they do each one of these actions. So I had this like little yellow caution sign by mind because I'm actually 13 Miles away from the job site that I put in. So, you know, maybe this is that this is happening. You know, we can see they weren't really on the job site whenever they clocked in and maybe we need to check in on that. But anyways, last little thing to do from the office perspective, it's just go ahead and complete the job and create an invoice. So we'll click on complete this job and we'll complete the job and create an invoice for...

BRITTANY

43:41 Him.

BRITTANY

43:47 I was other guy is able to complete the job out that field, like to kind of alert us that they're done with that work and we can send over the place. We can kind of go over everything or do we manually have to do it if they contact us?

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

HARRISON

44:00 Yeah. So in terms of that, you'll be alerted. I'm gonna walk you through this invoice. And then after that, I'll take you to the dashboard and it'll show you exactly where all that stuff is.

BRITTANY

44:11 Okay, perfect.

HARRISON

44:13 Yeah. So all our parts labor and items are going to be, you know, we're going to be able to load those in, you know, of course, this can be very customizable if you need to edit this or, you know, the detail level that you wanted to send to your customer... but to invoice it out. Really all we have to do right here is just click send invoice link and I'll pull up a full screen preview this. So again, all this stuff is going to be loaded in, you know, the details of our services. If you look right here in the top right hand corner, we have this big green pay now button really just want to make it easy for your customer or first off, we wanna make it really easy for you to get these invoices out to your customers in a more timely manner because there's money in your pocket a lot quicker is going to save you the headache from the office work.

--- Invoicing ---

HARRISON

45:00 I'm having to go in and manually type out all this stuff. But again, we wanna make it easy for your customer to go ahead and, you know, pay for the service that you get. So we can just click this big green pay now button pay with a credit card.

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

HARRISON

45:16 They can pay with AC, H directly from this invoice link that we're sending out. We can also include the service details, you know, with us typically working with commercial crypt service contractors. You know, our main point of contact isn't usually going to be on site. So that's why I think it's really important that we send over. These are the service details. This is going to tell us, you know, what services do we complete? What parts, what labor and items were used to complete the job, any comments, any files? So this is where like that signature from the contact on site would be. And then of course, any alerts.

--- Customer engagement ---

HARRISON

45:50 So, you know, like I've been saying, you know, our invoices are quotes with more multimedia on it. They're getting approved, you're getting paid a lot faster because it provides that clear visibility of work. So, you know, if we wanted to, you know, add more pictures like a before and after, you know, videos, anything like that. So now we're focused more on, you know, the work that was actually done, you know, rather than just the price. So, you know, just get paid a lot faster through being able to provide that extra level of detail... that's just in terms of quoting, you know, how do you think your customers would respond to that?

--- Customer engagement ends ---

BRITTANY

46:29 I mean, I think it looks nice. It's pretty. It looks like something that would be easy. I liked the fact that you can add videos pictures to it. I think is most important to us.

HARRISON

46:43 Sure. Cool. And I mean just in terms of since you're the one doing a lot of the invoicing, you know, do you think this will make your life a lot easier?

BRITTANY

46:54 I think that anything would make my life easier at this point in time. Anything that is the biggest thing for me right now is that if I go online, I want to be able to go to a dashboard and look and see exactly where every single job is sitting in.

--- Invoicing ---

BRITTANY

47:10 Like I've worked at service companies before, where I would walk in every morning. I can pull a report. I know exactly what calls are still open, that been touched, ones, I need to return visits, one of them that were pending nodes once were pending approval, completion from the shop or the, you know, the office and ones that were pending invoices, and then ones that were pending payments.

--- Invoicing ends ---

BRITTANY

47:34 So it's like all those things kind of it when I have a clear picture of what is going on with all of our jobs, I'm able to relate a clearer picture to our technicians who then our edit better at doing unclear job of completing all. You know what I mean? Like... it's so funny and glitchy right now that we, I just feel like we just don't looks like we have it all put together. And I think that if we had some kind of was the brain for us? Because if we're gonna depend on Scott, my brain to be the brain of the company. We're going to be a lot of her because we just have too much going on.

--- Dispatch ---

HARRISON

48:12 Yeah. Let me, this is going to be kinda right right up your alley as well too. Just in terms of giving you visibility of, you know, where our technicians are. You know, what jobs need to be completed, which ones are still open, which ones haven't even been scheduled yet. So this is going to be our dashboard right here. This is, this will be the first thing that you would see when you actually log into service trade. So at the top, right or top, right here is going to be our daily schedule. Just gonna give you clear visibility of who's where for the day, you know, also did they complete the job or not or is it still open? We have an overdue jobs without appointments. This is just a good way to be proactive. We can click into this, you know, schedule these out. So, you know, nothing's falling through the cracks, our jobs without appointments that are going to be do in the next two weeks again, you know, they're coming up.

--- Tech On-site ---

HARRISON

49:04 They're not assigned to a technician yet. Just go ahead and schedule these out. Our past jobs smart to be complete. So this is where, you know, the technician out in the field is going to complete that work. Quarter. Yeah. Maybe he saw a repair opportunity. He completed that, you know, clocked out.

--- Dispatch ---

HARRISON

49:21 All we have to do now, from the admin perspective, it's just click into these, you know, kinda come through and make sure everything looks okay. And then we'll completed, complete the job from the admin perspective to be invoiced out. And then after we've completed the job from the office, it's gonna drop down to this category or completed jobs to be invoiced. You know, we've done everything. Let's

just go ahead and invoice it out to your customer. So I'm just kind of providing you right word like clear visibility of what's going on. You know, where we're at which is with each one of these jobs, where we're at with our technician. So, you know, you'll have a full idea of everything that's going on and the day to day freed up for the office.

BRITTANY

50:01 Okay. So that means that the completed jobs to be invoiced or ones that have already been like kind of skim through reworded punctuation and class like complete sentences are being used from us, editing it from the shop. But the one that was prior to that, the past jobs to be marked complete. Those are ones that the technicians have marked as complete out in the field. We haven't buttons up. Okay. Yeah, because then we can make sure all the fields are on their time sheets are complete. Okay, that makes sense.

--- Dispatch ends ---

HARRISON

50:32 Yeah. You know, we just want to make sure that, you know, our technician out in the field isn't just completing it. And then it's good to go, right? We want somebody who's actual job is to kinda oversee this just to make sure everything looks okay. So just kinda, you know, skim through that, come through that a little bit more. And then, hey, if it looks good to you, then that's probably good. We're just complete it and then invoice it out to the customer.

BRITTANY

50:53 Okay, perfect.

HARRISON

50:57 That is kind of what I had in mind for walking you through service trade. Was there anything else you were, you know, really dive in to see?

--- Quoting ---

BRITTANY

51:08 Do you guys have like a reports page that shows like all the open quotes, the approved quotes, the denied quotes, the not touched quotes, the, how many invoices we have build out this monthly? Do you guys keep like KPI'S and stuff like that?

HARRISON

51:24 Yes. So what we can definitely track that for you.

--- Quoting ends ---

HARRISON

51:28 All you'd have to do is just go to the quote or invoice this page and you could run a report on all of that stuff.

BRITTANY

51:33 Okay. Let's all this stuff that you've shown today, that's part of the basic one?

HARRISON

51:38 Yeah. Everything I've showed you as part of the basic also, what's going to be included in there?

--- Dispatch ---

HARRISON

51:43 And, you know, we can touch on that if you want to. We also have a like a scheduling and a dispatching feature for maybe like some of those emergency service calls. If you wanted to like dispatch out to your customers, we could certainly do that. We also have, like I said, we have a map based scheduler as well and that's going to be include.

--- Dispatch ends ---

BRITTANY

52:01 Okay. I feel like I'm missing something that I was supposed to ask. Do you guys on your reports? Do any of those? Does that information show like margins or anything like that? Or when we do our invoices, do we, can we see margins or?

HARRISON

52:22 Yeah.

BRITTANY

52:23 Versus what we quoted?

--- Quote templates ---

HARRISON

52:25 Yeah, absolutely. So, you know, if service trade was something that you said, hey, this is a good fit for us. This is what we'd wanna do. What we'd be able to do part of your onboarding process would be us getting all your, you know, customer information, you know, pricing, yeah, pricing labor items, all that stuff, all those margins for that.

--- Quote templates ends ---

HARRISON

52:46 So we would just be able to load those into service trade. And then whenever you run those reports, do those invoices, you'd be able to check your margins on that. Okay?

BRITTANY

52:56 You, do, you know a lot about that onboarding part of all of this?

HARRISON

53:03 Yeah, I know a fair bit.

*--- Pricing ---*

HARRISON

53:06 I'll kind of walk you through how that would work. Essentially actually what we have a really good onboarding system. I think our retention rates about 95 percent which is really good for SaaS companies. Most of the time there are pretty fair bit lower. But what would happen during your onboarding, you'd be assigned an account manager.

*--- Pricing ends ---*

HARRISON

53:30 Essentially, what that person's going to be there for is to kind of hold your hand. And, you know, what walk you through getting set up with service trade. So, first thing that we would work on doing is getting all of that information, you know, like I said, that parts labor items, customer information, stuff like that loaded into service trade.

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

HARRISON

53:50 Another part of another part of what they would do is, you know, coach you up, we'd have like weekly meetings, you know, with your account manager, just letting you guys know, you know, best practices for how to use service trade from the office perspective. You know, how to use it from the tech perspective. We also have like certifications that you can take as well really because the last thing we wanna do is say, hey, thanks for the business here's. The keys to the car. Good luck. Right? You know, what are, our main goal is to be with you throughout the entire process and just get you guys up and running smoothly so, you know, we can form a good partnership. Okay?

BRITTANY

54:25 And do you know, roughly, like how long have an timeframe are you guys looking at?

HARRISON

54:31 You broke out a little bit, but you said how long does the onboarding typically take?

BRITTANY

54:36 Yes, yep.

HARRISON

54:37 Okay. So with you guys being for text own Quickbooks, definitely who we have a lot of it or a good bit of our experience with. I would say it would probably take, you know, from implementation to, you know, fully up and running probably about a month and a half to two months, you know, again from start to finish just because, you know, we wanna make sure we have everything right? You know, on our end and your end before, you know, we get this thing up and running.

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

BRITTANY

55:07 Okay. And...

HARRISON

55:08 How...

BRITTANY

55:08 Much time does that typically take of the office staff to get that going?

HARRISON

55:16 You know, and in terms of timing, I'm not really sure, you know, the exact time that, you know, each person needs to allocate for it. You know, I do know that it's something that, you know, we're gonna put some work into and you're going to have to put some work into as well. But yeah, I definitely wouldn't worry about onboarding that's not going to be like a full time job or anything. But... yeah, I mean, I...

BRITTANY

55:43 Are we doing like an hour a week where we sit down and we discussed stuff and you show me things or are we talking like an hour a day? You know, I'm just trying to, is there a way to hurry up this process so that we can use it earlier than that? Like I guess I'm trying to figure out the fastest way that I can use this without having to do a bunch of not like... the onboarding and the paperwork and the stuff like that is the non pain portion of our jobs.

*--- Purchase decision ---*

BRITTANY

56:14 So we're trying to find the best way to make the most money as fast as possible. So I need to get us back out into functioning and using stuff correctly so that we can get moving if that makes sense.

HARRISON



56:24 That makes perfect sense. So, I do know that the, it's normally about an hour a week, you know, for those meetings, I'm not quite sure if we can do more than that, but that's definitely something that I can check on if it's something you were looking to speed up as well. You know, I can ask around and figure that out, but I do know kind of the typical is about an hour a week, you know, those meetings and stuff. Okay... cool. But yeah, I, but yeah, I can certainly check on that for you though. Okay, perfect. You know, I'm just kinda curious. Yeah. Yeah. In terms of service trade, what are your general thoughts on it?

BRITTANY

57:09 Hi, may, I think it looks great. My biggest concern is I did the six to eight weeks onboarding. So that gives me a little bit of our applications just because that's kind of where we got and I put a lot of time into it. And then it wasn't a fit.

*--- Purchase decision ends ---*

BRITTANY

57:24 So with job or it was more of a, okay. You guys are live here's. How you add customers here's? How you do that. Like it was nice because it was just kind of I got free reign of it and I could use it as much as I wanted to not having to wait for them to put stuff in for me.

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

BRITTANY

57:43 So that kinda part is just a little, I'm a little hesitant about just because I, it would just be easier if we were, you know, given it and it was live a bowl and we were able to use it as we needed to so that my guys could start using it as we start adding stuff to it, but.

HARRISON

58:01 Yeah.

BRITTANY

58:02 Definitely. So, Scott, he see what he wants to do?

HARRISON

58:05 Yeah. And I mean, I do know to... you know what? Whenever we get this information into service trade, I mean, it's it is yours like, I mean, we're not gonna like block you out of the system out until you're onboarding because, or to your trainings over, right? You know, it's still your information. Like, I guess I didn't really explain the onboarding that will still your information. Like you can still go in and use the tool. I'm just saying, you know, in terms of the onboarding, you know, what we normally do those trainings for a couple of months just to, you know, teach you guys the best practices and stuff.

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

HARRISON

58:37 But like if you have, if you have the information in there, like, I mean, it's yours? Like you bought the system, you can go in there and start using it and stuff.

BRITTANY

58:45 And then, do you guys have contracts? Like how does this guy's just like a month to month thing?

--- Pricing ---

BRITTANY

58:50 Do I have to sign like a year contract? And then if it doesn't work, it doesn't like what kind is your guys his?

HARRISON

58:58 Yeah. Let me...

BRITTANY

58:59 Yeah.

HARRISON

59:01 Let me pull up the pricing real quick. So we are going to Bill annually.

HARRISON

59:11 One second.

BRITTANY

59:11 He said.

HARRISON

59:13 Yeah, no, you're good. I'm getting the pricing pulled up right now. So we Bill annually. So with you guys being four technicians, hi, I'm gonna strongly recommend the base package that's going to be everything that I just showed you. So it's going to be an annual subscription of 44,740. We do charge a one time onboarding fee and that's going to cover the work that your account manager is going to do to get you guys up and running. And that's going to be 1,750. So your first, your total is going to be 6,490. And then every year after that is going to be 4,740.

--- Access to information ---

BRITTANY

59:54 Okay. I will run that too. I just wanna make sure I have all my info for him. And then technically, like if I signed up and did all this stuff, I could technically give the

guys the app that we could start adding jobs to it and they could use it like tomorrow if you guys gave us our log INS?

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

HARRISON

1:00:17 Yeah, I do believe so, you know, if that's something that you wanted to go in there and like manually take the time to do, you know, we could certainly do that. And then, you know, as time goes on, we can keep all that information over you have from your other systems as well.

*--- Accounting integrations ---*

BRITTANY

1:00:36 Okay. I mean, like I could definitely pull over our customers from Quickbooks so that it's integrated correctly like with you guys, but then start slowly adding our own jobs and stuff like that's. Not the guys can use it as sure go forward because I don't want to keep using job or wall, I'm into implementing you guys because then I'm just not a lot of thing.

*--- Accounting integrations ends ---*

BRITTANY

1:00:56 Yeah. And so I don't wanna do that because I don't wanna keep implementing. And then like also sinkings, you know, whatever post into Quickbooks from multiple sites. So I just want to make sure that I can do it efficiently on my end and then also get my guys moving faster.

HARRISON

1:01:14 Yeah, no, I completely understand that part of it. But yeah. So what I would do on my end then is I will send you over this recording. So you can, I know you wanted to show it to Scott and then I'll also type up a quote for you. So you just have the pricing, I'm black and white and I'll send that over to you this afternoon as well. Okay? In terms of next steps, when would be a good time for me to follow up with you guys?

BRITTANY

1:01:43 Today's Wednesday. So I would say if you could give me till at least Friday just because I know scots out on job sites all day today, so I might not get him until later tonight and then I will wanna make sure that I can get in front of him and he actually has a minute to sit down and really look at it. So, could we maybe touch base Friday afternoon?

HARRISON

1:02:02 Yeah. You're Central Time. What if I give you a call on Friday about like one o'clock is that work for you?

BRITTANY

1:02:11 Yeah.

HARRISON

1:02:11 Okay, cool. I'll make a note. I'll send over a little invite. I'll give you a call at one o'clock on Friday, and, you know, we can just address any questions, you know, grab any thoughts or anything like that.

BRITTANY

1:02:22 Perfect. I appreciate it.

HARRISON

1:02:24 Awesome. Well, hey, thank you so much. And yeah, I'll be on the lookout. I'll send all this information over to you.

BRITTANY

1:02:29 Alright. Thank you, Harrison. I appreciate your time.

HARRISON

1:02:31 Yes, sir. Thank you. Have a good.

BRITTANY

1:02:34 Bye.

*The End*