



ServiceTrade & Control Service Center: Pricing & Next Steps Discussion

Brooke Caskey with Control Service Center
Recorded on 8/28/23 via Zoom, 42 min.

Participants

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OTHER

13035171728

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Transcript

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

BROOKE

0:00 Hey, Theresa.

13035171728

0:02 Good morning. How are you?

BROOKE

0:04 Good morning. How are you?

13035171728

0:07 I'm doing well. I'm doing well. Hi, Jay. How are you?

JACK

0:10 Good morning. Doing well. How are you all?

13035171728

0:13 I'm fine. Fine. I'm going to get everybody in here.

13035171728

0:22 Here of everybody else?

BROOKE

0:29 Hey, Brendon, hey.

13035171728

0:31 Are you?

BROOKE

0:33 I'm good. How are you?

13035171728

0:35 Doing well.

13035171728

0:35 Thank you.

13035171728

0:44 Okay.

13035171728

0:55 Okay. I hear, how you on the way?

BROOKE

0:59 Perfect. There you?

BROOKE

1:10 Are we waiting for anyone else besides Kyle? No?

13035171728

1:14 That's...

BROOKE

1:15 It. Okay. Kim is not coming?

13035171728

1:18 No, she's off today.

BROOKE

1:20 No worries. Cool. Well, just let us know when Kyle's and then we can get started unless you want us, to get started and he'll join when he can.

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1:29 He is here. Now. He's sitting down.

BROOKE

1:32 Great. Okay. Well, good morning. Everyone afternoon, depending on where you're at, but thank you for taking the time to meet with us today. So, our intention for this call is to talk through the service trade onboarding process as well as pricing for the premium plan that we've been looking at before we dive into those two topics.

--- Purchase decision ---

BROOKE

1:53 Jack and I wanted to open up the floor to any questions that you've thought of since our last meeting. And then from there we'll go into discussing onboarding and the proposal we've put together for you all. But any preliminary questions before?

2:10 We looked at some looked at several different programs here is, was there a way that when I do an invoice that I can, Brandon and Kyle can review it before we send it.

--- Invoicing ---

BROOKE

2:25 Absolutely. That's what we encourage actually.

JACK

2:29 Yeah, absolutely. There's a different statuses that you guys can use and sort of manipulate internally of what means, what to you all? But with our invoicing report, there's different statuses, you can base it on our dashboard, we have invoices that are, you know, ready to be reviewed from a technician standpoint.

--- Invoicing ends ---

JACK

2:46 And then once the job is more complete, it shows that it's ready to be invoiced out. So, there's a few different ways in ServiceTrade that you can kind of your checks and balances for your internal processes?

13035171728

2:57 Okay. And then I can visually see that Brandon or Kyle or both have reviewed it.

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

JACK

3:07 Yeah, because that way number one with like our breadcrumb trail, you know, receipt of who's doing what on a job or like on an invoice, we're always showing, you know, who updated what there's a comment, left things like that. And then if they either tag it or mark the status of like reviewed or, okay, or whatever it is that you guys deem suitable to you.

--- Invoicing ---

JACK

3:28 All that way, you can see a one off or you can run a report in bulk that shows me, show me all invoices that are marked as reviewed, that's my key to then go in, and physically send them out to the customer.

13035171728

3:42 Great. Thank you.

JACK

3:44 Absolutely.

BROOKE

3:51 What questions do you all have?

--- Invoicing ends ---

13035171728

3:55 Just to review, we have seen another option that has the speech to text and you had verified that you guys do that. Yes, yes. And then the other one was, I'll check, right?

BROOKE

4:13 Yeah, yeah.

13035171728

4:14 I think.

BROOKE

4:15 I'll check. It depends on the device that they use, but, yes, there's I'll check.

--- Assets ---

JACK

4:22 Yeah.

13035171728

4:22 Another really cool thing we saw was OCR recognition... where you take a picture of... serial plate or, you know, whatever, what is it? A name tag on the unit on the equipment? And it would actually, it does that too.

BROOKE

4:47 I, I've seen us do that, Jack. Keep me.

--- Forms ---

JACK

4:50 I think it's again, I think it's built in, to confirm. I think it's built into the apple product too that you can scan the equipment and then populate the information. You can help that populate into like the asset fields and things like that from a technician standpoint.

13035171728

5:10 Only for apple though.

--- *Forms ends* ---

JACK

5:16 I'll have to double check, but I think that's the case.

13035171728

5:20 Okay. Yeah, because we have half of our employees use android, so that's kind of important. Okay?

JACK

5:27 Okay. Is that something that's important to you all?

13035171728

5:31 It's a nice little feature because it's one one more area for guys not to put in the wrong information.

JACK

5:41 Sure. Yeah, absolutely. I, again, I'll have to double check, but I just wanted to confirm if that was if that was a must have, or more of a nice to have just curious.

13035171728

5:54 That was nice.

BROOKE

5:56 Yeah. Can I ask, is it one platform that's been showing you all of these features that have been standing out to you or is it different ones across the board?

--- *Access to information* ---

13035171728

6:06 Yeah, I think it was the build off that we were looking at that and they showed a couple in a recent meeting, and that's what prompted us to ask if you guys could support the same.

BROOKE

6:17 Definitely. When they showed you the OCR scanning, do you know if it was from apple or android? Because that will answer our question or at least interest there.

13035171728

6:28 They did not.

BROOKE

6:29 Okay. Yeah, we'll clarify it. We know for a fact that apple has that capability, but we'll clarify about android.

13035171728

6:38 Thank you.

BROOKE

6:39 Sure. Any other questions before we dive in?

13035171728

6:49 Looks like we're good.

BROOKE

6:51 Cool. Okay. So, I wanna start and I'm actually gonna slip my camera off just because of this glare in my eyes, but I wanna start by going over the onboarding process. So, let me find my page here.

--- Implementation and ongoing support ---

BROOKE

7:19 Okay. Hopefully, I am, can everyone see where it says structured onboarding?

13035171728

7:24 Yeah, yeah.

BROOKE

7:25 Right, perfect. So to outline what it looks like to partner with service trade, we have this guideline page right on our website. Essentially, what happens when you partner with us is you'll be first dedicated or first assigned a three month project management period with a dedicated project manager. And this is something... where we really set ourselves apart from the rest is how hands on we are with you during your implementation period because we know that's the most fundamental part of setting you up for success and giving you up for your subscription with service trade to use your investment properly. So typically, what will happen is you'll sign an agreement, you'll agree to the dates and then you'll be assigned that project manager. I mentioned from there, you'll schedule your kickoff call and your kickoff call. The intention for that is to make sure that everyone's on the same page with when you'll be meeting weekly to go through things like your data implementation questions from the certification modules we'll give you and just have a touch point each week to make sure that, you know, that again it's a handholding process. You're not alone in implementing a new system. We're here to help you. So you'll have that kickoff call to talk about when is the best time to do that. Each week, we'll give you access to your certifications and we break those down per role. So you'll have a technician certification and office certification and an admin certification. And those are little like a little workspace where, you know, watch a video to a quick quiz follow

along with a mock account to learn the system. And then on the data side that's where we really do the heavy lifting, we'll take your data from you that you provide to us in either a CSV or excel file and we'll clean it up. We'll put it into the system and then we'll review it with you to make sure it looks the way that you're expecting.

JACK

9:26 One quick note on the certification program. We actually have a team dedicated internally making sure that our certifications are up to date with our product updates and things of that nature. It's how everyone internally figure, you know, learns the platform and their modular base. Like Brooke was saying. So you get kinda quizzed as you go and they're specific for the technicians that one's very straightforward office admin and you can go and take them as much as you want. It's included with your subscription value.

BROOKE

10:02 Yeah. And there's...

13035171728

10:02 Sorry. So that certification is kind of like a testing process as we go to see how well we're getting it. Is that my understanding that, right?

JACK

10:16 That's correct? And so you'll have a customer journey dashboard with your project manager to show you hey by this stage of your onboarding, this is what you need to have completed and who should be, who should have completed the certifications. So like typically the technicians, we, because, you know, we've been doing this for so long, we have a formula that the technicians typically take their certification the closer to your go live date because we want that to be fresh information retained for them. And essentially, you know, the office goes first, it's essentially what is capable and how to the service trade. And then from there, your project manager on their weekly calls, it's all right. I just learned how to create a job in service trade today. How can I apply that knowledge to, you know, the every day, you know, control service, how, you know, this is how we do it. So in service trade, how would I manage it this way? And then from there, the project manager can help you with those best practices of, you know, once you learn the baseline here's, how you can actually incorporate it into real life scenarios and things like that.

13035171728

11:18 Okay. Thank you.

--- Implementation and ongoing support ends ---

JACK

11:20 Absolutely.

BROOKE

11:21 And then in terms of your data that we will ask you to send us, we like to start with these five aspects of your business. So any customers you have your services, that you perform, any items lists that you might have, your customers equipment, or in ServiceTrade term assets, and then any PDF you want the system.

--- Implementation and ongoing support ---

BROOKE

11:41 So these are the elements that you'll hand over to us. And then my team puts them in for you. And then we talked about the certification program towards your go live date. And, and each week actually you'll have Q and a session sessions just to make sure there's nothing that needs a little bit extra attention on learning the system towards your go live date. You'll have... additional support from that aspect on, you know, getting jobs up and running, actually running real jobs in the field, you'll have support on that aspect. And then once your go live date is here and you guys are ready to kick it off, you guys will be handed to an account manager. And just like the project manager who's holding your hand through the onboarding period, your account manager will do that for, a, the balance of your subscription as long as you choose to partner with us, you'll be able to have account help calls with them, where they go through your data and how you're using service trade. They'll talk about aspects where you're using it really well, and maybe what you could be doing more to make the most of your investment. And then they'll be the ones to talk through any renewal opportunities too.

JACK

12:56 So, aside from you'll, always have access to like frontline support. We have an entire dedicated, you know, customer support team. So like if you need to, you know, a technician or an office user needs to just ask a quick question that's great for like frontline support, the account management, the account manager that will be assigned to your account is for you all to have a single point of contact again to Brooks point, are we getting the most out of our investment right now?

--- Implementation and ongoing support ends ---

JACK

13:22 What are we missing or what are we doing incorrectly that's what they're there for? So that you are getting the most out of, your partnership with service trade?

BROOKE

13:35 Any questions here so far?

13035171728

13:39 Have a question, how often do you guys send out patches, or upgrades, and how much do you listen to your customers as far as... what new items you're going to be adding to the software and things like that. How much is, how much... communication is there? As far as that?

BROOKE

14:06 I'll let Jack take that one from a manager standpoint.

JACK

14:11 Sure. That's a great question. So, a couple of things, to add to that. So, our customer, you know, the fact that we only work with commercial mechanical and fire protection contractors. You know, being in niche market, we take their, our customers feedback very seriously. And so, you know, we have a customer advisory board. We have, a yearly conference. Actually, our next conference will be, I believe in April of next year in Texas where it's called the digital rep conference where we have people talk about releases of the product, or what they need more for like peer group working sessions, things like that. So, you know, we're constantly getting feedback from our customers on, what they need. And then when we do roll out like big new feature sets, we'll have a couple of our customers to say, hey, do you want to be a part of the beta program? We want your feedback to make sure when this is released to the greater, you know, general audience of service rate that we've done it the right way and that we didn't just think of it internally. We actually got real industry expertise behind these feature sets. And so with that, you know, we're constantly updating the system behind the scenes that's the luxury of softwares of service. Any major updates I would say is, you know, maybe once a quarter, couple of times a year, but there's little things that are updated over time. The good thing about is every time you log into your ServiceTrade account, we give you a notification of major changes with a support article that shows you, what was changed with that and saying, hey if you have other questions, reach out to so and so to make sure that you're utilizing this correctly?

--- Implementation and ongoing support ---

13035171728

15:51 That's okay, perfect. Thanks for answering that.

JACK

15:56 Or...

BROOKE

15:57 And then to just break down the onboarding document a little bit deeper, I thought to show an example of onboarding phases that you might go through. Now, this specific example is for perhaps a larger account. So, you know, take these timelines with a grain of salt. You might, your company might get done a little bit faster than this example here. But nonetheless, the phases, are quite similar. So like phase one, you would have your kickoff call in your data overview. Phase two. We would review your data with you once it's ready to be put into the system. Phase three, we would talk about setup and, you know, kick off our weekly calls, and then phase four would be any sort of, you know, additional scoping that you might need. And then phase five of course is going live. And so we put this into the workspace for you all to take a look at as well. But just so that you have a narrow view of the timeline for implementation because again, it is something that we've put a lot of thought and effort into.

JACK

17:06 Yeah. And, to Brooks point here, this is just an example. Your account would be actually more towards a 12 week roll out.

--- Implementation and ongoing support ends ---

JACK

17:15 This is just like the higher end of it, but a company of your size and scope would be more around 12 weeks. But, the main thing to call here is this is a very trusted process for us. We take this very seriously. It's you know, out of the box repeatable process that we have.

--- Implementation and ongoing support ---

JACK

17:32 So as you guys are evaluating other systems, I definitely implore you to get data around. What does your typical onboarding look like? Your success of onboarding people in the time that was proposed? Because you know, you can be over promised, and under delivered in some of that aspects. And for us, in order to maintain a high retention rate, it starts from the beginning and that's why this is a very, you know, intricate process where you have multiple people helping you along the way. So you're getting the most on your investment?

BROOKE

18:11 Before we dive into the numbers that we've pulled together any last minute questions about implementation?

--- Accounting ---

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18:27 We're thinking... service... no, you wouldn't require access to our software, right? You would just want the excel files that we're exporting, correct? Yes. And I'm looking kind of, I was looking at it the other day just to see what, you know, if everything is exportable. It seems like it all goes through the report generator.

--- Accounting ends ---

13035171728

18:57 So I'm gonna have to kinda look at that a little more carefully since it's an older program and we don't know, you know, that, how well it talks to other things and how many of the files and how much of our information can be exported. I kinda wanna look at that first and just make sure that most of it. Otherwise we're talking about a lot of data entry. We've been using it for 15 years now. Yeah, 15 years. So there's a lot in there.

BROOKE

19:32 Yeah, that's understandable. Okay. Is that something that's pretty easy for you to have access to our figure out?

19:41 I'm working on, yeah, like every day I'm looking at something else, you know, I guess I wanna go back to that other screen. I started making notes about customer services items and prices, and then I kinda, I wasn't fast enough. Okay. So those are the things I'm probably going to focus on, right? Because that's the kind of thing you're gonna want to import, right? Okay.

BROOKE

20:10 Yep. And it's not one of those things where we absolutely need all of these. This is, you know, as much as you can get the better because it gives you quite the head start. Like you said in not needing to manually implement a bunch of data, but yeah, let us what you have, and then we'll work from there.

13035171728

20:31 Okay. Going back to that.

BROOKE

20:34 No problem. Yup. Okay. So now to touch on the numbers. So I'm sure you saw that I put the proposal in our workspace this morning and my fault. I made a slight mistake on it. So I'm gonna correct that because I know that I saw that you guys were looking at it... but to walkthrough the proposal line item by line item, we will take it from the top here. So starting with our technician license for our premium account, and we talked about how you guys would be looking at the premium account for the project management aspects, as well as access to things like the customer portal and multiple terms and conditions.

--- Pricing ---

BROOKE

21:15 There's. There was a few elements of premium that just made a bit more sense for you rather than starting on the select account. So that's what we're going to go off of today. We talked about having 12 technicians on premium. We do Bill annually. So our annual price per technician is 1,668. So your total price for your subscription is 20,016 dollars for your two helper licenses, that's a flat rate of 59 dollars per month billed annually. So that equates to 708 dollars. So the two helpers would equal 1,416. And so this, these two lines, the first two cover your annual recurring cost. We also have a premium support on the ticket. You'll know that there's no charge for that is also included in your subscription fee. And now my small hang up from this morning is I put that onboarding was a little bit more than it should have been compared to the proposal. You saw, it was lowered. So instead of that 52 50 number that you might have looked at this morning, it's actually 4,200. And then we have an optional service delivery window extension. And this is something that again is optional. But we put it on our proposals to be fully transparent.

--- Implementation and ongoing support ---

BROOKE

22:39 And what this is if you were to extend your implementation period for any reason beyond the dedicated three months that will give you this is the extension rate to extend it per month. And typically, the only reason that happens is if, you know, you're missing your weekly calls, communication has dropped and, you know, things like that happen which is one of those things where if you communicate with us, we'll be as understanding as we can, but that is the rate for extending it.

JACK

23:11 I will say that.

13035171728

23:12 Sorry, sorry, Jack. Go ahead.

JACK

23:17 I was saying that optional rate, we take a lot of measures ahead of time to communicate with you all about what, for what if your project gets off track for whatever reason you'll hear from us, our onboarding team, we try to all be on the same page, as that, something that's typically not applied to make accounts. I just, we just have that on there so that we're fully transparent.

13035171728

23:41 So, we're allowed three months to implement. And if we go beyond that because of whatever we're not, we're really not participating that's when it takes.

JACK

23:56 That, that's correct? Yeah. And, and again, that it's a rarity where that would be. But if you're just not showing up your calls or calling us back and things like that... we can so much we can do there. But again, that's why we take the onboarding process so serious about getting you all up and running as quickly as possible and it's for us, it's a tried and true method of a company of your size and scope you fit into our advanced onboarding window. So that's that three months dedicated time that you have with us, to get your account stood up and trained.

--- Implementation and ongoing support ends ---

13035171728

24:31 Yep. Okay. Them calls it the incompetent.

JACK

24:36 Exactly what it is Jim.

13035171728

24:39 You just have.

JACK

24:39 To, with it.

13035171728

24:43 Okay.

BROOKE

24:47 How are we looking from a number standpoint?

BROOKE

24:55 Beat... what was that?

JACK

25:01 It's...

13035171728

25:01 Very...

13035171728

25:02 Competitive...

BROOKE

25:03 Okay.

JACK

25:05 Yeah. I know that you all are in the market. I just didn't know if you all had allocated spend for your new software purchase or anything like that. Just the more we know the better, obviously. But the other question that I had is now knowing our time line for our onboarding, and things like that, have you all thought of when you would want to be live with the new system, you know, either beginning of next year or whatever that may look like?

--- Purchase decision ---

13035171728

25:35 Winter...

13035171728

25:35 Definitely our slowest time. So we're kind of in our fiscal year ends in November.

JACK

25:42 Okay.

13035171728

25:43 Nice to do that transition around there. So we didn't have to overlap two different programs on one fiscal year, but I don't see that being possible. So, probably, you know, end of the year early next year or something like that.

JACK

25:56 In terms of actually saying, hey, we're fully using a new platform. Okay?

13035171728

26:00 Yeah.

JACK

26:01 Okay. Gotcha. And that's helpful about the fiscal year end for you all as well. Okay. Yeah. So for us right now, Brooke, just so that we're transparent when is our next onboarding date availability? Is it October one?

--- Implementation and ongoing support ---

BROOKE

26:22 It's I think it is September fifteenth, but let me double check. So, we do have three spots left for September fifteenth in the advanced tier. And so that would, you know, say your kickoff call is September fifteenth. That would be the start of your three months. And so October, November, December that would put you closer to a go live date in the middle of December.

--- Purchase decision ---

BROOKE

26:47 So you'd be gearing up before your end. We also have a few spots left for October first if you wanted to make it, you know, closer to the actual end of the year... and those spots are come first serve. Okay? Yeah.

13035171728

27:11 I think that makes sense. We'll have to look at all of our calendars because obviously was the holidays then thrown in there and vacations and all that kind of stuff. We would have to just kinda narrow that down, you know, make sure that.

--- Implementation and ongoing support ---

JACK

27:21 Sure.

13035171728

27:22 Everyone is available, so we don't have to go into the incompetent extension.

BROOKE

27:27 Another aspect to consider is that September fifteenth is not too far away. So in terms of gathering your data, it might make more sense for you all to do the first, but that is obviously an internal conversation, for you.

13035171728

27:42 How often do these come up? Is it every two weeks or that just happens to be?

BROOKE

27:48 Yep. So we kick off new customer onboarding every two weeks. Okay? And so you're going to be starting on the fifteenth or the first of the month?

13035171728

27:59 If we, if we wanted to bump that further, we signed soon with you guys, you know, deciding forward with you guys, could we bump that to the middle of October or something depending upon schedules?

--- Implementation and ongoing support ends ---

JACK

28:10 Yeah, absolutely. Yeah. At the beginning of the summer, we had mechanical customer sign on just to take advantage of price. And then they would say, but I'm not starting this until it cools down so that's definitely a strategy that more so mechanical customers take.

13035171728

28:30 I have one quick question on, the helper level license if you don't mind reminding me, if we went with a helper or two is the only thing they're able to do is put in their time function.

--- Tech On-site ---

BROOKE

28:44 They can clock in, clock out, leave comments and take pictures. And I think that is the extent of their capabilities.

13035171728

28:53 Okay.

JACK

28:54 And they can edit what. They can only edit the attachments that, they can't edit existing attachments.

13035171728

29:01 Okay. So like...

13035171728

29:02 To have like startup forms for example, or some PM checklist forms for them to be quite those, they'll have to be on the premium.

--- Forms ---

BROOKE

29:12 They'll have to be on the full time license to fill out forms.

JACK

29:15 Are they typically filling out those forms?

13035171728

29:19 Just by pay for now? But they're lower level entry guys where they're you know, changing to filter and doing a check mark and I was wondering if we'd be able to get away with them on the helper side, but it does sound like it.

--- Purchase decision ---

JACK

29:35 Sure that that's something good for us to know too. So, if that becomes an issue, let us know, happy to work with you. If there's if that's like the only caveat that you're missing, then that's good information for us to know too.

BROOKE

29:50 Yeah. Talking about timelines for implementation. Have you all considered the best time for you to come to a final decision on software?

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30:06 We...

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30:06 Haven't really talked about it. We're kind of narrowing down our final couple right now. So we need to sit down and have that conversation. We don't have a timeline for you yet?

BROOKE

30:18 Okay. And I know that you mentioned a few of the features that BuildOps had showed you earlier aside from them. Do you have like a top three narrowed down of who you really looking at?

--- Purchase decision ends ---

13035171728

30:34 I probably right now, it's between you guys build off?

JACK

30:42 Okay. Is there anything functionality wise that we would need to go over just in terms of, you know, where we win, where we lose. I'm curious if there's something that stands out positively or negatively, from a ServiceTrade standpoint.

--- Purchase decision ---

13035171728

31:07 That look pretty similar. The dispatch all was pretty similar.

JACK

31:10 Okay. And that's fine. If you don't have an answer today, I just, I would be remiss if I didn't answer the question.

13035171728

31:19 So, probably if we did, would you recommend that we just go back to the recording or maybe pinpoint where we talked about some of these things probably in the first visit we have.

BROOKE

31:33 Right. Okay.

13035171728

31:35 Since we can't really see it other than there, you know, and without you guys having to do that again?

BROOKE

31:41 Yeah, sure. Yeah, yeah, we have the recordings in the workspace, but I think what Jack is Jack and I are trying to understand is, you know, between service trade and BuildOps, what is it really going to come down to for you guys to make a decision... in terms of product and functionality?

--- Purchase decision ends ---

BROOKE

32:03 So we just wanna make sure that we're you know, showing you all of our bases and what we're doing for commercial mechanical contractors. So, I think that was sort of, the driver behind his question. Yeah, that's right.

BROOKE

32:21 And...

13035171728

32:22 I don't know for me or for me with BuildOps, it looks, you know, obviously, I'm not the sharpest knife in a drawer and, the invoicing look, I don't know kinda similar to what we're doing in total service. So it just seemed to flow but from my understanding... but, you know, other than, that, that's the only input that I could.

13035171728

32:45 And...

BROOKE

32:46 Yeah. When you say it looks similar to total service, is that a negative or a positive comment towards them?

13035171728

32:52 It's just what I'm used to, just what we've been doing for the last, you know, 15 years. So, it's just the flow of just being similar. I just made more sense to me.

JACK

33:06 Is that just from a review standpoint, Jim, or?

13035171728

33:12 It's just, the whole process, of making an invoice from, you know, what the service texts provide? So, I mean, it's not a big deal. It's just, it's just the one thing that jumped out at me.

JACK

33:30 Okay... sure.

13035171728

33:38 But for me, it's definitely, you know, it's not a deal breaker of any sort.

JACK

33:48 Yeah, we can always update our workspace with some other specific workflows. I think that's you know, we have some tools internally for us to be able to record other snippets and stuff that there was something that was like, hey, can we go a little bit deeper in this section or something like that? We're happy to do that. Another thing too that I wanted to bring up and we can share, the registration information with you all today. But we actually have, a project management webinar. I believe it's this Wednesday at one eastern where we'll be walking through, you know, with more of our sales engineering team walking through all the capabilities and feature sets, that part of our platform. So, if you guys wanted to join that's another great learning experience for you all to see what we're doing and where we're going, with those features.

13035171728

34:37 Again, Jack, it's Wednesday or what time?

JACK

34:40 I believe one o'clock Eastern Time, but we'll send you the registration so that you can sign up if it makes sense. Thank you. Absolutely.

--- Purchase decision ---

JACK

34:54 Okay.

13035171728

34:57 Well, we've gone.

BROOKE

34:57 Through discussing implementation and then reviewing numbers in terms of pricing... from here. It sounds like you all still need to, you know, take the time to review your options, and pinpoint when you'd like to make a decision aside from that, can you think of anything else that needs to happen before our next checkpoint?

--- Purchase decision ends ---

13035171728

35:26 Did you have any references to give us any, anybody, we could contract any of your customers perfectly local?

JACK

35:39 You are in Denver? Is that right?

13035171728

35:42 Near we're just north of it?

JACK

35:45 Okay, sure.

BROOKE

35:47 Yeah, I get, you know, at least one to start with. And if you need more after that, then we're happy to provide others.

13035171728

35:57 You don't mind those contacting? I'm sorry. Okay. What was that?

JACK

36:05 I was, I start talking over you. I'm sorry, Theresa, what you're saying?

13035171728

36:10 No, no, no, I was just wondering if it's okay to contact them directly?

JACK

36:16 Yeah. Well, we will. So our process for references, our customers typically sell service rate better than we do. But we always like to reach out and just make sure that they're available especially with the holiday coming up this weekend. So our, we'll go with our account management team. We have like a list of people that typically like to talk about it. And then we'll see one if anyone local is available and if they would want to talk with you, sometimes people within the area don't like to talk about ServiceTrade because they see it as a competitive advantage for them. But I laugh when I hear that, but, it does happen. But we will, we'll try to get you somewhere, you know, near your area similar size, doing the work that you guys are performing. So you all can really talk about best practices, you know, from an onboarding and you should stand.

BROOKE

37:05 Okay. Is that something you're doing with BuildOps to getting references from them? Perfect. Yep... from like a sales standpoint, obviously, your salesperson can sit here all day and talk about their product and how great it is. But references really go a long way and, you know, proving the launchevity of it.

--- Purchase decision ---

BROOKE

37:27 So that's something that we will get to work on right away today. If I can get you someone to speak to Theresa or whoever else on the team. Can you make time for that this week?

13035171728

37:40 Yes, absolutely.

BROOKE

37:41 Okay. So let's take it from there. So I'll get you guys a reference, this updated proposal with the correct onboarding amount is in our workspace. I'm going to delete the other one, but you'll have access to this to review a little bit more in depth internally. And then I guess from there, it does it make sense to schedule a call to discuss your decision sometime next week. Would that give you enough time to go through?

--- Purchase decision ends ---

13035171728

38:14 They're saying, yes.

BROOKE

38:16 Okay, perfect. All right.

13035171728

38:22 Another team call, or are we just doing this over the phone?

JACK

38:28 Yes, can connect on that. You don't have to, if you don't want to, it's up to you.

BROOKE

38:33 Okay.

13035171728

38:34 Just, I'm just curious. I didn't know if all of us need to be included again or?

--- Purchase decision ---

BROOKE

38:38 Yeah. I mean, the purpose of the next call is going to be to go over your decision, and then, you know, if it makes sense to send an agreement, I would imagine it would be helpful to at least have it on Zoom just in case there are, you know, last minute questions. And so I would say let's plan for that, if that's okay with you Theresa?

--- Purchase decision ends ---

13035171728

38:58 Of course. Yeah.

BROOKE

38:59 Okay. Do we wanna do a week from today at the same time?

JACK

39:06 We have, what about?

13035171728

39:10 Yeah, none of us will be.

BROOKE

39:15 What about Tuesday the fifth?

13035171728

39:20 We...

BROOKE

39:26 Hear?

13035171728

39:26 Or?

13035171728

39:34 Tuesday, Wednesday, what is that? The sixth is, are available?

13035171728

39:44 That sound good with you guys?

JACK

39:46 Yeah.

BROOKE

39:47 Yeah, that works for me. I have, I can do the same time we started today or an hour earlier, an hour later, whatever makes the most sense for you all.

13035171728

39:56 This is a good time. Okay? 11 o'clock our time. Thank you.

BROOKE

40:01 All right. Let me mark that down and I'll send you an invite to you. Great. Okay. Well, I think that's a good place for us to part ways today and then we'll send you a reference probably by the end of the day today, if not, you know, at latest tomorrow afternoon, it just depends on us getting a hold of someone and getting there okay to pass along, their telephone number, okay?

--- Purchase decision ---

13035171728

40:28 That sounds good.

BROOKE

40:30 Well, if you guys think of anything else until then, you know, either call e-mail, me or put it in the workspace, and we'll be happy to help.

JACK

40:38 Yeah, and just to double down on that, if there's anything in terms of like functionality wise, that pro or negative things like, that as you're looking into it,

please let us know to make sure number one, do we show you that correctly? Or, if it's confusing because you've looked at so many different platforms we're happy, to make sure that we can show you that again if need be, or just send you a snippet of, what that feature set looks like and then same thing from pricing, whatever it is. If, if you guys can just be transparent with us, we'll reciprocate that back to you all, and just wanted to make sure that it's you know, the correct partnership.

--- Purchase decision ends ---

JACK

41:14 So more transparent with us, the easier it is for us to help you out. If you feel like you're stuck, or can't figure something out. So just wanna leave it with that.

13035171728

41:25 Sounds good, Jack.

JACK

41:27 Thank you so much.

BROOKE

41:29 Talk to you soon. Bye.

13035171728

41:31 Thank you, right? Have a good one. Bye.

The End