ServiceTrade

Tanya Eney with Craftsmen CPAs
Recorded on 12/29/23 via Zoom, 1 hour 5 min.

Participants

SERVICETRADE

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CRAFTSMEN CPAs

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Topics

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TANYA

0:03 Hello? Hey, Jim. I'm hello?

JIM

0:06 Wait, I'm here, but I'm not hold on.

JIM

0:15 We're experimenting with a new camera setup in the conference room here. So, is it Tanya or Tanya?

TANYA

0:25 It's Tania?

JIM

0:26 Yeah. Okay. But Tania with a...

TANYA

0:29 You...

JIM

0:30 Know. Yeah. So it's always, I noticed that I was checking on that. I watched your video. I was watching your video on the project thing. I think it was you and...

TANYA

0:42 Yeah, couple of other folks.

JIM

0:44 I kinda felt like you people were speaking our language like... so where are you located?

TANYA

0:54 I'm down in North Carolina.

JIM

0:56 Okay. Like the Raleigh area, is that?

TANYA

0:59 Exactly, right. I'm in a.

JIM

1:01 Nice.

TANYA

1:02 Cool. And where are you guys out of?

JIM

1:04 We are probably about 20 minutes south of pro for ireland. We're in Barrington.

--- Type of work ---

TANYA

1:09 Okay.

JIM

1:10 So, yeah. And so, we spend, I mean, for the last couple of years, I've been focused really focused on Construction, but sub contractors, so.

TANYA

1:22 Okay.

JIM

1:23 Sub contract is both commercial and residential, but I seem to, you know, commercial is easier. Commercial has more complicated setups and sometimes easier for me to get in there from a consulting standpoint.

--- Type of work ends ---

JIM

1:38 So we try to the reason like I'm like a recovering cpa, so I try, I'm trying to do less tax. We do a lot of fractional CFO consulting, monthly, accounting... and software selection and implementation. And honestly... this whole commercial subcontracting space there's such a blue ocean there of who can do both service and project management and do it well.

--- Type of work ---

TANYA

2:11 Yeah.

JIM

2:12 Like we've used notify in the past. I don't know, who you consider competitors, notify doesn't really notify has light service and they're not interested in building out service. So, if you have a company that's got both heavy service and heavy project management, notify has got a great project management tool, but their service is light. So now you're looking at combining two things and that doesn't really work well because as you know, you take, you're pulling installers to do a service tack, and now you pull a service guy to go to an install job and you have two different, you know, setups on your phone and trying to move hours and all that craziness.

TANYA

2:52 Yeah. I have heard of. No, I don't think we, I don't think we really compete with them all at much, but that makes sense because if they're heavier on project management and lighter on service that I think, you know, track a slightly different, you know, type of some contractor mean, I think, you know a service trade, we definitely have a very specific niche.

JIM

3:13 It's...

TANYA

3:14 Commercial service contractor that does a lot of maintenance. And then those bleed into like you said, installs small projects. And so we can manage that now too with our project management module.

JIM

3:26 Okay. Hey, did, I introduce Justine? I'm sorry, this is Justine.

TANYA

3:31 What are you?

JIM

3:32 And so she does a lot of the monthly accounting stuff.

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

JIM

3:36 There's. Another woman, Michelle, who works with us, but she's still traveling on vacation. So over Christmas break, but so I was gonna have her here as well, but she's...

TANYA

3:45 Well, I'm recording it so I can send this to you after, if you want from her perfect.

JIM

3:50 Perfect. So can we, I'm a 50,000 for you guys? So I like to start there the detail. So my first question, is it's I'm amazed that I hadn't run you guys sooner. And one of the weird things is I'll tell you how one of the ways I've come across your name a few times in groups. But the first time was someone actually had delivered a pamphlet to a customer of mine. A virtual customer. I'm like, I just thought it was odd. I'm like I got a software company and delivering a brochure.

TANYA

4:27 Was it a Weber or a book?

JIM

4:30 It was a, it was like a three like the folder brochure.

TANYA

4:33 Really? Okay. We do, we are out and about, I mean, you know, I've been in my LinkedIn, but I've been selling Construction accounting software for my whole career and it's always me back of the nineties. There was a little bit in the early 2000. I can go on site but, you know, pretty much it's been web based. And then I came over here about three years ago. I was like, you guys really go on site a lot and visit people a lot, so.

--- Type of work ---

JIM

5:01 I just thought it was interesting. I mean, listen Construction, you know, it's a different anyway. I always tell people like I'm like, yeah, listen postcard mail. This work. Sometimes it depends on what you're doing. Like Construction guys want to tag something on a refrigerator and they wanna look at it and say, okay, I'm going to this, you know, this meeting or whatever it is, you know, Construction, I'm working, I specifically pick some contractors because I wanna work for the under dogs.

--- Accounting integrations ---

JIM

5:27 Yeah, sub contractors are always the under dogs. And so what I'm curious about is since I haven't run you guys earlier, my first thought process was like, well, who is their ideal customer? And what is that customer on? Because maybe the most of their customers, on QB, they're on Sage intact. They're on some other accounting software which whereas like we specifically deal with QB.

--- Accounting integrations ends ---

TANYA

5:55 Yeah. So, so you said the first time you ran to us was?

JIM

6:01 That looks sure. Yeah.

TANYA

6:03 And what was the time?

JIM

6:05 I'm in some groups like, you know, like accounting groups, like one, have you ever heard of Jason blame? So, that's a like a cpa, think a lot of progressive cpas, but it's all different. It's not all Construction, it's a.

TANYA

6:23 There's...

JIM

6:23 So, then Richard Roper runs another group called roundtable, he's a big, this is all QB pro advisors. But because, I was in the round table and someone was talking about, I got this customer and, they wanna put implement service tree. What are you guys thinking like that's? Funny, this name keeps coming up. Look at these guys. And so, and like, you know, we've had we've gone through a few iterations? Have you ever heard of CF data?

TANYA

6:52 Yes, yeah.

JIM

6:54 So, right before, yeah. So right before COVID, I was called up by a larger CP from providence and said, hey, listen, we got this customer the, you know, the finance person walked off the job and can you come out and take a look? Like we just need you to help us get some financials and attack return for the bank? And so I go out there, I spend the whole day like finding the password, complete disaster, right? Like they're on data. I've never heard of this thing. I'm like this is unbelievable. So I basically, at the end of the day, I called the CP called, listen, I took me three hours. I found the passwords hidden on, the finance person's computer. I said I got logged in, the sales tax is paid, it's all in house payroll, which I hate and like because it's on CF datas payroll. I said they're not even a payroll provider. They're a payroll software company. And so he basically, what do you think? Can you get the GL and, the return done? And I said, well, you got two choices. I can get that done. And then you can put the change on the door in 60 days or I can run the company right now a couple of weeks because that's all I got and hopefully I can save them from going out of business and he goes, well, do what you need to do. And I said, okay, we ended up saving it. It ended up being a good relationship, and we ended up moving off CF data. We went to knowify originally.

TANYA

8:24 And...

JIM

8:25 Then we ended up on another system. Now, you ever heard of BuildOps?

TANYA

8:30 Yes.

JIM

8:31 So, we've been on BuildOps, although BuildOps... it's been a love hate relationship, you know, they don't I don't you guys seem like when I listened to your videos and stuff you guys seem to understand and what you've built, some of what you've built on the project management side is stuff that I've already given them to say, hey, I want this built. I wanna, I want a portfolio dashboard that shows all my projects like this right now. They, I don't know if you guys have this, but like, you know, one of my customers, this bigger customer here, they're complicated. They're complicated because they have a lot of Aia certified payroll.

--- Type of work ---

JIM

9:14 And we changed the mix recently and we went heavier on service. That's why we had to leave notify the, we ended up going heavier on service left, notify because we knew that we would crash the service department. And so what I'm trying to figure out is, can you guys really handle heavy? You do a I do.

--- Type of work ends ---

TANYA

9:34 No.

JIM

9:34 Okay. So the, so the, that's a perfect question at the high level to say, okay, they're not a fit for this. But now the question, is they could be a fit for this residential age back that Justin and I got going on in Connecticut and I'm like, but let me ask you a question like just since we're at the 50,000 foot view and I'm not holding you anything but what type of, how does the pricing work in the range?

--- ST app contracts and pricing ---

JIM

10:01 That because, you know, it's like, so I'm working with it companies trying to find stuff and like I'm like guys, you even ask me what my budget is? Like, you want all this, you want to do all this analysis. And I'm like your budget, you tell me you only spend 2000 dollars a month on it that's not my budget.

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

TANYA

10:18 Right.

JIM

10:19 Out of my budget. So I'm just trying to understand the range. So like, this residential leads back in Connecticut, we have is it's three guys. It's a small operation. We were thinking about putting them on noify because they're really like it's a lot of tax exempt entities. It's like it's installs, it's quoted jobs and some light service. You know what I mean? No, Aia, no certified like none of that job in like, but the problem is they've never been, we just switched the payroll but they've never been, they've never actually been on phones before clocking in and out of jobs. So that's probably the hardest issue.

TANYA

11:02 Yeah. I mean, I think with a company like that. So let me run into this. And then I can answer that. So just a little bit of just 50,000 foot view, you know, a little bit of history on service trade. We've been around for actually, you know, 11 years. We were started in 2012. So this is a little, we've had about 1,400 customers. But really our focus is commercial mechanical fire contractors. And since you saw some of the videos, I won't spend too much time on, you know, what service trade does?

JIM

11:37 I didn't see the service side though. So I see the service in the phone like, but if you like I said, I just wanna make sure like if you come back to me and say, Jim, this is 30,000 dollars a year. Okay. Well, all right. That's a different that's not a number that doesn't fit my client base. You know what I mean? Yeah. So I mean notify at the highest level is roughly 6,000 a year in like this. So like there's residential age back in Connecticut right now, there you ever heard of FieldEdge?

TANYA

12:12 Yes.

JIM

12:14 Catalog pulling my hair out, can't understand what we're making on jobs because you don't really flow invoices through.

--- *Invoicing* ---

JIM

12:24 I don't know how you guys handle that like on jobs or invoices going in to... into service trade first go into Quickbooks, and then sync over to service trade.

TANYA

12:35 They would, it would start in service trade, then go to is, okay?

JIM

12:42 Okay. Cool. That's with most Construction. So like BuildOps. Does that notify? Does that everybody's different? Like notify is a two way automatic sync, whereas BuildOps is a more traditional accounting sync where it's a push rather than a pull.

TANYA

12:59 Right, right.

JIM

13:00 You have to push it. You gotta remember to push it, right? But, and they all have, there are different flavors on how they sync so, but I, I'm curious to see the phone set up what it looks like from a technician standpoint.

--- Access to information ---

TANYA

13:16 So, this is actually what the app looks like on their phone. So this is a job that they're working on. They got, you know, all the, these buttons that they can, you know, what they wanna do. So they can see, you know, in, you know, details like, you know, access code.

--- Tech On-site ---

TANYA

13:32 They can see a list of tasks they need to do. They can attach pictures. So they want to attach pictures, they click on attachments, they can see contacts, job comments, what service they need to do there. And then when they arrive, they click clock in and then that starts tracking their time that could be used just for billing purposes or it could be also used for, you know, time collection to be sent to a payroll system.

--- Type of work ---

JIM

13:57 Okay.

TANYA

14:00 You know, we have, so service treat is, you know, traditional service package. So we can, you know, what we are big on is what we focus on, the firing life, safety and mechanicals. Because a lot those commercials because those guys sell maintenance agreements and then schedule those maintenance agreements and make sure they're doing all the tasks associated.

--- Assets ---

TANYA

14:20 We also a really strong in pull-through work. So you're they're doing a maintenance on a, you know, piece of equipment. You discover something, you can note it, bring it to the customer's attention. So they can keep their equipment running and they can choose to say they want to quote on that.

--- Deficiencies ---

TANYA

14:35 Then we can take that. We call it a deficiency or recommended repair. They can take that efficiency, quote it customer approves it, turn it into, you know, work and then continue on. So we're really strong in helping those maintenance contractors manage all the work that comes off of it.

--- Deficiencies ends ---

JIM

14:52 Let me ask you a question. So... so, the company in Connecticut, I was talking about, they thought they had contracts. They don't really, they used to take like pre payments really and then schedule maintenance, right? But the problem was is it was, you know, it's the back of a cocktail napkin, right? Like stuff like now, somebody's gotta remember everybody's running around, you know what I mean? And so I've told them listen when I'm doing contracts. So what do you give? What do you offer the customer? Besides the fact that you're saying we're basically selling you a service, but we're gonna perform it six months from now.

--- Recurring maintenance ---

JIM

15:29 So really it's just a prepaid is a prepayment for service, right? So I can you, if you didn't have a contract, could you still schedule like using service rate? Could you still schedule out and say, listen, I'm gonna put a reminder on here that I'm gonna do this church's maintenance in the fall of 2024.

TANYA

15:49 You can. So we have what's called recurring services. So you can set up on a schedule like every one month, I go out there every six months, they go out there. And then you can run and have it schedule. You know, you can say, okay, let's do this month.

--- Recurring maintenance ends ---

TANYA

16:04 So when somebody's got a lot of contracts they can, you know, narrow it down, they wanna work on a certain area, getting those all scheduled. And yes, it will be a reminder for them to say. And then they'll even show that they're past do because what's helpful too is you've got something you're going to be out of that church in six months. When, if that church calls you in four and a half months or five months and says, I've got a problem. Maybe you wanna do both things at the same time. So you

can see that you've got a maintenance contract with them that you wanna get it scheduled at the same time. You've got a service call.

JIM

16:35 Yeah, that's exactly this is now, let me ask you some of the dispatch board, right? Is one dispatch board for service? Like, so let me step back. I'm sorry, let me go to the 50,000 for view because most software companies that I've found they, I don't know why they, you know, his, we're not like I look at, it is what I'm asking.

--- Type of work ---

JIM

17:00 I've asked people before I said we're not a unicorn like, the stuff we're asking for is what other companies are looking for, which is I look at it this way. And a lot of the owners that they will do two, is that it's three things. It's service, quoted jobs and projects, but no one wants to split it out by three.

--- Quote templates ---

JIM

17:19 They always sorta combine service and quoted jobs together and they make a disaster out of it. They're like, I like where, hey, service is here, right? The service call, we go out the fans that we got to order a fan. Okay. Well, I wanna quote for that. Okay. Well, we'll give you a quote. We're gonna do a quarter job here's. What it's gonna cost you wanna do the job? Yeah. Do you guys do that or do you sorta keep it all together?

TANYA

17:45 So if you're out there doing service and you discover something and you can create what we call that efficiency that you can send to somebody to say, yes, I want you to quote me on that.

--- Quote templates ends ---

TANYA

17:55 And then that quote, once it's approved, could either be a brand new job or they can say, I'm still here. I'm gonna just tack it on to the job I'm on right now so you can do it either way.

JIM

18:07 So, let me tell you why. So, like I'm on, I'm a large client that I'm like a factual CFO for. I get guys complaining, especially installers.

--- Deficiencies ---

TANYA

JIM

18:17 Right. So, like whether it's notified build outs, whatever. So let's say, on the service side, we start to put tasks and like, hey, listen, when my service text go out, I want them, they need to do XY and Z. They need to ask the customer this, they need to take before and after pictures, all this stuff, right? And, but like let's say we're going out to do an install job. The installers get frustrated because they're going through the same list of questions as if they're doing a service call and they're like, you know what I mean? I want them before and after pictures. I, you know, I told the owners, I said before and after pictures should be there for quoted jobs too.

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

JIM

18:53 But like we probably don't need these other steps, all these diagnostics steps or whatever that we have in there that's why it seems like service and quoted job should be separate when it comes to the guys out in the field. When they go to do that quoted job like that, they have a like you can set up a different criteria on their phone when they go out and they say, hey, I'm going to do this quarter jobs on take eight hours, say they're clocking in and clocking out and maybe they take some pictures, but that's it.

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

TANYA

19:21 Right.

JIM

19:21 Whereas the service guys got a laundry list of things he's gonna go through to do that because he's getting called because service is really, when we look at service, it's really like it's TM or it's T, because I called someone calls and says, hey, my heat, I'm getting, I got no heat call, right?

--- *Assets* ---

JIM

19:42 I got no hot water over here. Okay, go down and like, so it's a diagnostic. We're going out there. Do you, I mean, do you guys look at that differently? Or do you look at it the same way that, so I'm looking at it now.

TANYA

19:54 I mean, for the technician, they're gonna get that same, you know, if I look back here, this, it's gonna look like this. The job description is gonna, you know, be different, if it was a maintenance job, there's gonna be tasks associated with that, you know, check this, do that et cetera. But if it was just a, but if it was a quoted job, there wouldn't be any tasks. It would just be, you know, you're installing this package unit on the roof, blah, blah kind of thing.

JIM

20:22 But I can force them with your software, but at least force them to take pictures and say, hey, listen.

TANYA

20:28 There is, yes, there is some things that you can force them to do some things. Yes. Okay. Take take sure, you know.

JIM

20:35 I mean, that's a huge, I mean, it may not seem big to you but it's big to.

--- Type of work ---

TANYA

20:40 It is because they forget, yeah. And...

JIM

20:43 The fact that like all these other softwares, I just don't think that people, they say they have people that are from in the Construction field. But I don't think there are people, like when I listened to you guys and like I was watching it with the owner, him and I were watching yesterday, I'm like check this thing out and we were watching, we were looking at the project management side and I'm like, these guys just seem to speak our language, like they understand exactly how an hvac company works and this is what we need to get the information and do.

--- Type of work ends ---

JIM

21:12 And then even what I loved about your software was I'm a keep it super simple type of guy, right? Clean lines. I want easy buttons to find. I don't like, you know, at one point I was dealing, I won't name names, but one of the softwares I was dealing with the developers like to put new things in there. So you'll find. So I said what I was on a phone call and I'm like who does it? I said the problem is, you know, your development team, you've got the fox running the hen house. So you said the development team should not be running. You need to tell them what they need to deliver and that's what they need to deliver. I mean, the problem, is, I mean, it's hard because it's hard to find with developers. So, but that's so that's what I love to buy your software. And like some of the things like even the way you guys laid out like the project side and like had like the cost coming in. I mean, like you had a lot of things that were there that quick snapshots of KPIs that we wanna see to gauge projects as well as the business.

TANYA

22:18 You...

JIM

22:20 Know like, you know, like I start having like, you get it because, I looked at your background like, right?

--- ST app contracts and pricing ---

JIM

22:25 You're a CFO, you understand, like it's like, okay, I wanna see like I'm looking on going, hey, how many project bills did I send out last month? And what's the total dollar value? Yeah, I built 10 that I build 20. I mean, I'm my large client. We might build 20 Aia jobs, right?

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

JIM

22:44 And then, like I wanna know like, hey, give me a list of the ones that I have built in more than three months, right? Build these. Because now I want to go talk to the owner and say.

TANYA

22:53 Hey.

JIM

22:53 Why is this job sitting? Is it we're waiting for equipment or we haven't gotten back to it? Like we don't have the resources to get back to it, why? Because when jobs sit, we lose money.

--- Pricing ---

TANYA

23:03 Absolutely.

JIM

23:05 So... all right. So this thing, so... what are we looking at? I just wanna know for like a three person company, like what type of investment does that company to make right now? We're paying? I mean, right now, they're paying seven, 775 100 dollars a year for field.

TANYA

23:32 I mean, we're definitely to be more, we are a higher end package. We got, you know, for the small like. So we start at five tech shops are great. We have some, we do have some three tech shops. They do have to buy the five tech minimum, but we've got sort of three different flavors select, which is a lot of our Quickbooks customers premium. And then enterprise. And, you know, the Quickbooks users are the smaller ones like the five tech shops or so they're in, the select package. Then as you move up into premium, you get access to more things like customer portal. Now,

there's more functionality with that next step. And then enterprise is, you know, access really to everything and all the bells and whistles that a smaller shop may not be into because they don't have the staff.

--- Type of work ---

TANYA

24:21 They're not, you know, they're not mature enough of a company to handle all those pieces of it. But, you know, for us, our ideal customer profile is these types of customers, you know, commercial contractors. And the reason why is because we focus on commercials because they have those, they sell so many maintenance agreements.

--- Type of work ends ---

TANYA

24:43 They have a reoccurring service. So fire life, safety, you know, they have to be out there doing inspections all the time. They, you know, are noting things that are out of code. So they're tracking efficiencies that have got to be fixed. And then the mechanical electrical, not as much some plumbing, but the mechanical space.

--- Type of work ---

TANYA

25:01 You know, they sell service contracts. They got to go out there and look at the chillers, the boilers, the, you know, air conditioning, you know, those units not only fix them but do all the maintenance on them and then any problems that come off of that. So residential is not really our market because those guys don't do a lot of service agreements.

--- Type of work ends ---

TANYA

25:24 You know, they're pretty much one and done with most customers. You know, some companies have recurring customers but, you know, with the commercial space, those are customers that they're servicing, you know, time and time again, you know, residential may call them back, may not, they're more focused on marketing, you know?

JIM

25:42 Yeah, this is great. I actually, I'm refreshed that you're like, hey, listen, you should be proud of like, hey, this is where we, this is what we do. This is what we're best at the same thing when people call me and they say, hey, you know, like if I had a custom home builder, call me, hey, listen, it says you do Construction like, yeah, but I don't do custom home building that's different type of software you need to be, what are you using for that different type of setup?

--- Type of work ---

JIM

26:06 Like, you know, you, I can put you in touch with someone that can help you with that, you know. And so I get it. This is awesome. But one thing that, so one question I have for you is, so if you're dealing with commercial industrial base only, right? So at some point you guys are gonna need to, build out an Aia solution on project.

--- Type of work ends ---

TANYA

26:28 Well, maybe, I mean, we've talked about it, you know, I tell them all the time now that you put, we put our toe in the water with the word project management, you know, project management like pandora's box of things that people think of. You know, I mean, I sold Sage for many years and Sage has project management.

--- ST app contracts and pricing ---

TANYA

26:47 I don't have people say the word project management. I'd be like, well, what does that mean to you? Because it means a budget of things. So, I think where we right now our box for project management is it's a little bit larger project. It takes maybe a couple of months.

--- Type of work ---

TANYA

27:03 I may have a budget that I want to keep up with, but I'm doing more projects for owners, not projects for general contractors, you know, because the owners aren't the ones always that are requiring Aia billing and tracking those things. It's the general contractors that, you know, want that. So we're more owner pro. Yeah.

--- Type of work ends ---

JIM

27:24 You're actually some larger direct owners. I mean, we're trying to do like my largest customer. We'd love to be 100 percent direct owner, but like, they do a bunch of work for they've got to GC that they do work. They do all post offices, mechanical work for post offices.

--- Type of work ---

JIM

27:41 So all that's Aia billing, right? Commercial. I think at least on the east coast where we are over here, it's hard to do commercial mechanical and not to be 100 percent direct owner is on.

TANYA

27:56 Yeah.

JIM

27:58 I mean, we're trying to, I mean, that's part of my consulting is getting the owner to sort of, hey, listen, we've been shaving down GC like this guy doesn't want to have a relationship. He's he doesn't care about you.

--- Type of work ends ---

TANYA

28:10 Yeah.

JIM

28:12 And I mean, like a lot of times the GC as, you know, what I open the owners eyes to is say, listen, this GC is picking you because he knows you can finance the job more so than, yeah, he wants you to do the work but he knows you can finance it.

--- Type of work ---

JIM

28:25 So now he's slow paying. I mean, that's basically that's why the subs take on all, the pain a lot of times.

TANYA

28:32 Yeah, absolutely. Because that's a lot of what we preach to is being able to really look at your customers and maybe shave off the ones that, are not doing the repairs and that are running you around because, you know, a lot of what we talk about to our customers is, you know, labor is as we all know is so scarce and having planned service contracts and keeping your customers on scheduled maintenance. So their equipment is running that they're not calling you out at three in the morning. You know, they're not maintaining their equipment so that it's constantly, you know, you're being reactive service where you can better plan and schedule maintenance, and keep everything flowing. Is, is part of what we preach too. So that's interesting.

JIM

29:18 Yeah, I would think, your software if I was selling it, I would be going after the commercial roofing market because commercial roofers are typically direct owner.

TANYA

29:30 Right. Yeah. You know, we do have roofers call. Sometimes, you know, the thing with roofers, there are some roofing specific quoting software, you know, then they get.

JIM

29:39 They...

TANYA

29:41 Want to be able to, you know, take like have the like the Google map view of the roof and do the quick estimates. And but yeah, it is, I mean, some of it is sorta similar because they do maintenance amongst commercial roofs there. They do make.

JIM

29:56 And then it leads to a rough job.

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

JIM

29:58 And most, there's no GC involved because they don't need a GC. They know what the GC now is gonna add zero value.

TANYA

30:04 Yeah, exactly. Just, just.

JIM

30:07 Yes. So, but yeah, you're right? There is an estimating piece like how they're doing that like, you know, how they're doing their estimated.

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

JIM

30:16 A lot of guys have those, you know, they got their little magical sheets. They have whatever they built to out those jobs. So listening, I don't know if there's anything today, but, I do see a, this is awesome that we sort of went through this because I see exactly where you guys fit in. I don't you know, right now I don't have a customer that I would move to this today but this is definitely in my I'm putting service straight in the toolbox to look at for the next one that comes up. I just, I was really, I was looking at the 50,000 review. Okay, tell me because before we even get into the details, you know, what does it look like? This is what I do, what I go out, the customers and they say we're gonna look at the software. What are you trying to accomplish? Like, you know, what do you have? Like people will say, I'll say, what do they have? Do they have, you know, how much a big do, like there's another H back software company if they start. And I work with zero too, but like, and they claim they can do... they claim they can do whips and that stuff, but they can't they like, they, that's the problem, is like the whip report is huge, for companies that are doing that have a lot of jobs open on a monthly basis. Like an accurate whip that someone can go through is huge.

TANYA

31:43 Yeah.

JIM

31:43 Notify, I will tell you has a whip report that is pretty solid now, but that I work with them and some other people like when we were on the software, like, I spent a lot of time working with some of these software companies just to hey, listen.

--- ST app contracts and pricing ---

JIM

31:59 This would be great. Why don't we put this on here? Notify has the whip because they've got the, I mean they've got Aia billing, which the billing is pretty sweet. The way it works, BuildOps, does Aia billing? This, there's other software I looked at, they clean, they had a billing but they only did PDF and they couldn't they basically were like, well, we can't bring in the previous Aia pay up.

--- Pricing ---

JIM

32:26 I said that's a nightmare. So at six seven pays and I gotta hand do each one to look at the last pay up to say, what are the numbers supposed to be crazy? So let me ask you a question. How many people you have, how many employees at service trade?

--- Pricing ends ---

TANYA

32:46 So we have probably like 180 employees.

JIM

32:49 Wow. And so your development team, is it a combination of in house and out house or is it like...

TANYA

32:56 It's all in house?

JIM

32:57 It's all in house that's even better and you guys have one in eurado, just North Carolina.

TANYA

33:05 We, I mean now it's you know, now with this new world of after COVID, I would say 70 percent of our workforce is in North Carolina, but, you know, just with now it seems like people are much more, you know, more spread.

JIM

33:20 I don't know what it is. I find like dealing with different vendors, like in different areas, like I don't know what it is. I was talking to some of my customers

and like they want like Jim, we just need to deal with these there's like different parts of the country where like they're just on a different thought process and like we just had, we just went through an issue like it for so hard to find good it for like and I was just deal with an it firm out of Colorado and it was just, they just didn't get it.

--- ST app contracts and pricing ---

JIM

33:52 We're doing like a 15,000 dollar project and like they had all this project management time and nobody was project manager and they just didn't they had smart text but nobody was managing the project and it was just like, I don't get it. You like 100 person firm?

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

JIM

34:07 Yeah. So it's just and I just, I don't know, we found it easier to like with like staying on the east coast like, you know, the time zone stuff is difficult. Yeah. Dan, like you guys are on east coast. I'm like, okay, if we were to grab some customers and be on service trade with them, then, you know, we're dealing with them, they're on east coast. We're on east coast like, you know, something, because sometimes like California's hard like BuildOps is out of California, notifies out in New York. So well, they're not, they're all over the place, but I think they originally started in New York or so. I'm not sure exactly where their main offices, but they have a lot of remote employees to build up.

--- ST app contracts and pricing ---

TANYA

34:50 Now BuildOps, you said they do AI billing, do they also give you like a whip report and all the reports you need? I was curious on the project side.

JIM

34:59 They have a whip report... and not a big fan of their reporting. And I think they've struggled. So there's two reports.

--- Accounting integrations ---

JIM

35:10 The two, the two biggest let's see if you agree. So the two reports. So I'll tell you about my largest client, right? Tons, I billing or payroll, right? So we ended up, we ended up putting payroll for Construction in which is a Foundation product. It's a lead in Foundation uses that to grab people and payroll Construction. And then, hey, check out Foundation software. So put Foundation software was not the right fit for them because they needed a fractional CFO. They've got an office manager like, so I'm the fractional CFO, and when you go to a Foundation software or something like that, you just, you need be for your back office, yes.

JIM

35:53 And it just didn't fit the structure, the cost structure and everything else. So, so we decided to go a different route and that's where I decided to say list, when I look at this business and simplify it all can be struck down to qbo as long as I have a strong front end system, ended up putting payroll for Construction in and originally put notify.

TANYA

36:15 Okay.

JIM

36:16 And the notify implementation was painful because they don't really know. I like to notify people. They don't really implement their own software. So BuildOps does, I think notify wants to just send you videos that may have changed. Now, I have, I implemented this over two years ago? I mean, literally probably took years off my life... because they didn't really explain to you like, well, how do I get all these whip? Like, I mean, I'm on a customer. Like I must have been one of their largest, had been one of their largest larger customers. We're on the highest package.

--- *Pricing* ---

JIM

36:56 So we're on advanced we're on notify enterprise level, which is like I said at the time, I think it was like six grand a year and, you know, but you got 20 let's say you got 50 50 jobs, you got the whip cost in and how do you get those all in? And like there was no process to say, how do you do this? You know?

--- *Pricing ends* ---

TANYA

37:21 Yeah, that is a tough thing. I mean, you like an accounting software. You get, yeah, you do as I used to implement when I was doing sane 100 years ago. And yeah, you have to get all your beginning balances in and update your job costs and everything. I mean, I would think that be the same too with even BuildOps. So you got to get all that beginning stuff in.

JIM

37:38 We did. And it was, that was although it was easier the second time it was because we, I'd also streamlined it were the owner like they were sorta have way too many jobs open. So we streamlined it to get less jobs open, less to do. We planned for the implementation. The first jump was sort of like they sorta push me. They're like we gotta get off data because, you know, what data is downfall was. And the president called me, and Eric gold stems the owner, I think the CF data, and he says, Jim, you know, sorry to see you guys left. You know, one, I said, Eric, listen, I said, I like you guys, your supports rate. I said the problem is you're not a payroll provider in your payroll software company says, yeah, again, I said you're putting everybody

in payroll. I said we just went to a COVID, guess what happened? E, RT, sees all this stuff. I said the 941 was changing every week. I said you guys couldn't keep up your call. I need to ask me what's going on with the RTC and I'm like man, they couldn't keep up with it. So now you're like you had to download off the irs website and do manual. I said I got on a business. I can't this is not a core piece of the business. This is payroll. Yeah, I need you, to take care of this stuff so we can run the business and make it profitable. So he got it. He's like, yeah, I've heard that from a few other custom. I think that, you know, they seem they've lost some customers to other people, but like.

TANYA

39:05 They seem like a small group because I feel like the big like Foundation or Sage, they seem to, you know, I think all those ones that do Construction have taught their customers that the best way to do payroll is internally because they can allocate it so seamlessly to all the jobs.

--- Accounting integrations ---

TANYA

39:23 And so, because we fight, you know, we always fought with that is, you know, like I was selling intact and as we intact first rolled out or Construction didn't have payroll. So, all these guys were like, come I get to my payroll, I've always done payroll inside of my accounting software. What do you mean? I have to use adp? That doesn't make sense? How am I going to get my job cost, correct?

JIM

39:40 Yeah, you know, those, have you ever heard of points north?

TANYA

39:44 No.

JIM

39:45 So, points north is not, they are a software reporting developer. I wish I had known about them before I went to payroll for Construction. You know, payroll for Construction works, the office manager knows and like we use it but like it's still a little clunky, like, you know, like because it's Foundation is clunky. I mean, you look at it like, you know, when you open up like when I look at your software, it's beautiful service at you.

--- Accounting integrations ends ---

JIM

40:12 Look at it, you're like, okay, the UI is beautiful, right? Like it looks good, right? That's what like someone cares about the way it looks and it's simple like but they haven't I don't know why, but there's just some companies that like either, I don't know why they just maybe it's because of, the code that they originally developed on that they can, you know, that it's a huge undertaking and effort, to make cleaner and nicer but like it's just something to be said about a software company.

JIM

40:40 We looking, this is easy to find stuff like, so points north does like, they do certify payroll reports that can be baked into like an adp, a page, look like you're an adp. I forget which platform I don't know if it's all, it might be just total workforce or whatever and you can click through.

--- Tech time tracking ends ---

JIM

41:03 It looks like you're doing, your certify reports an adp, but you're really clicking through to like a point north screen where they do it that's one. And then the other one was, have you heard of miter?

TANYA

41:18 Yes, you know. So I still very much have a lot of colleagues in the Sage world and a lot of them with intact have been pushing miter. And I was just looking for another one I met called Construction payroll. Dot com. That was another one too.

JIM

41:33 I've never heard of that one. I've never looked at my closely but it looks, it's intriguing to me. I've looked at, I've never.

TANYA

41:40 I should, my colleague, that the company I work for alliance, the Sage partner that's the one that like the, that's the one that they've decided to go with to push because price is good.

--- Tech time tracking ---

TANYA

41:54 It, it does certify payroll. It does everything for, you know… yes. So you may, I will take a look at it. I also, I met somebody who does Construction payroll dot com. It says they do prevailing way unify payroll, tax reporting, payments, job cost, labor distribution. So.

JIM

42:19 Okay.

--- Accounting integrations ---

TANYA

42:20 Yeah. I mean, I think so if it's price point and, you know, how well does it work with? Maybe, you know, the different accounting package to me that's my big would

be my big thing is reporting and, you know, how I can pull it back into Quickbooks or whatever software. So.

--- *Accounting integrations ends* ---

JIM

42:36 Yeah. With payroll, honestly, I don't even look at price is the last decision on everything else. And I'm like, okay, I was gonna integrate what's my reporting gonna look like, right? Because if you can do everything I wanna do, I'm probably willing to pay a premium for that payroll just to get what I want, right?

--- *Tech time tracking* ---

JIM

42:54 Like, I mean, payrolls, for decades payroll has sold. I mean, that's like adp still does it today. I mean, just, and it's not the adp reps fault. It's the way they incentivize them. It's like they come in and they try to go right immediately a cost, right? Like we can see like, but most of the time as an adviser cost is my last.

--- *Tech time tracking ends* ---

JIM

43:17 If I can get everything else to work the way I want it. I'm probably gonna save internal costs right now. Absolutely, you know, you're gonna save, you have stuff down on the work processes and all that. So, so this is cool. I definitely, I'm glad I reached out to you guys.

--- *Type of work* ---

TANYA

43:37 Yeah. I mean, you know, definitely commercial. I mean, not to say we don't have some people that do residential, but if that's, their main thing, we're probably not a good fit because mostly because they probably use a lot of what we have to offer and our cost is gonna be all of a sudden. We're gonna look super expensive because they're using this small.

--- *Pricing* ---

JIM

43:56 Let me ask you a question, five person firm, right? Select what you say select was the minimum one you don't have to give me. I don't know if you guys do custom pricing or it's menu pricing based on like, the size but like what ballpark are we looking at there?

TANYA

44:12 So, there's basically per technician per month. So the select I believe is 89... then the, let me find the pricing actually because I don't pricing sheet here.

JIM

44:37 So it's a nine per technician per?

TANYA

44:39 Yes, per month. Yeah. And then you've got one 39 for the premium. And then it's 189 for the enterprise.

JIM

44:51 Far, so, like if you look at that like, I mean, all right, let's say that's you know, I mean, let's say it was 100 dollars a month and I had five techs. I mean, you're talking 500 a month, talking six grand a year. Now, the question is now the question, is, do I need to be on QB advanced to use service trade?

--- *Type of work* ---

TANYA

45:14 I don't know which version of qbo, if it needs to be advanced, I can find out.

JIM

45:21 That like with notify on a certain package, you need to be there. The only thing, you know, I say the residential contractor in Connecticut, but we do a lot of like commercial stuff too. We do churches.

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

TANYA

45:33 Yeah.

JIM

45:34 Restaurants, and things like that. So I'm I would love to see if, maybe, you know, I know it's not really in the sweet spot for you guys. But what do you do for? What do you do for an implementation package? Is that a one time cost?

TANYA

45:52 It is, I have actually, I finally found my little pricing page here. So the 89, it usually targets the Quickbooks customer. So it's got the quick Quickbooks integration is included. And then you move up into like three M where you get into other things like, you know, multiple terms and conditions access to the service portal for the project management that you saw. And then when you get into the enterprise that's where you get into, you know.

--- *Type of work* ---

JIM

46:19 Yeah, I almost need to be a premium now.

TANYA

46:23 Yeah, I mean, it depends, you know, we have a lot of select customers. I mean.

JIM

46:28 Customers can't be doing and what are they doing for their installed jobs? They're not using that project management tool.

TANYA

46:34 I mean, they're mostly just service contractors, you know, doing service calls or maybe it's a small.

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

TANYA

46:39 I mean, you can still do a, an install, you know, one two day install. Maybe you're just it's like they treat us quoted job, you know, like I'm doing a new Installation of, you know, a unit, an air unit, and it's going to be a whole day job. So that's just a quoted job and they schedule, you know, the whole day off for that customer.

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

JIM

46:59 So, okay. This is interesting because I didn't look at it this way before. So, what you're saying is on select is really service and quoted job premium agent or there's other stuff but support for custom integrations, all that stuff, emergency support, but project management, which is, but really the question that comes down to, are you really like, are you a company? I guess looking at it from my CFO lens, if I'm doing some sort of whip reporting, I probably need project management, right? I... probably can get away with select.

TANYA

47:32 Correct. There's a lot of these small guys that are just service, aren't doing a new type of whip reports. You know, they're just it's, they build the job, they move on is completed. So everything's kind of acts like it's completed.

JIM

47:45 But I see what you're saying like, you know, here like there's like five tax you're paying a minimum no matter what, like, yeah, okay. This is great. I mean, I think, you know, listen, this is definitely what I was hoping like, you know, I was expecting it to be somewhere in that range pricing wise. Like I said, I'm not a guy that like hangs everything on price. I'm just not that type of guy like, you know, but I do need to get a sense of what's the budget look like. Like if I got somebody who's spending a 1,000 dollars right now and I have a conversation with them to say, yeah, you're spending a 1,000 dollars, this person, you got Benny over here in the corner doing spreadsheets all day, this where, you know, like let's start the factor in these costs,

you know, and then maybe it becomes a shift and roles inside of a company move to a product like this, if it made sense, like on the commercial side?

--- Paper process ---

TANYA

48:44 That's what I think happens like you are doing a lot of outside things, you know, yes, you've got, you know, service now, FieldEdge, any of these smaller service packages that have a schedule board that can send out a work order to a technician on the phone and do the very basics but it's sort of all the other stuff quoting and managing the quotes and, you know, all that whole piece of it.

JIM

49:06 Yeah, yes. FieldEdge with Justine, what's your thoughts on FieldEdge?

TANYA

49:15 I mean, it works for right now. Clunky, with invoicing.

JIM

49:21 It's clunky with invoicing, right? And it doesn't at the end of the day, you can look at your job profitability on your quote jobs, tuliwithout, pulling paper detail because they're not running, you're not running your job material costs through there.

--- ST app contracts and pricing ---

JIM

49:37 So now you either gotta run a PL at the qeo level by to see if you've got that even in there. But like if you're not job costing at the qbo level, then you're never gonna get that cost anyway.

TANYA

49:50 Right.

JIM

49:51 And then the question, is like, is he using, like is the operations manager using the right markups or is he given better market again find time someone's like they're using like why are we using different markups? Like this is not a sliding mark up company. Like this is what the markup these would be if we can get more great a little bit. But like, you know, we gotta have the right mark up.

TANYA

50:14 Now, with your, I was just working at yesterday on putting together some stats from last year of what we sold like, you know, software because I work with, you know, the accounting software in my screen here.

TANYA

50:32 So it's a little small. I make it bigger. So this was last, this was 2023 what we customers, we sold what they were using for software. As you see, we have some that are mysterious Quickbooks users, but we have, I mean, so of the customers, this is, the bulk are Quickbooks users, which is always the case. You know, it's the number one accounting software package out there. But yeah, here you mentioned QB or do you push people to that versus desktop? We have a lot of people that still are on desktop.

JIM

51:03 I think what you find in Construction, Tanya, and you probably saw this is like it's what I call like, the steady and probably like I go into companies and like, why do you do this way?

JIM

51:14 What we've always done it this way or they don't have, they don't have a champion inside the castle, right? Like what, I, I'm not to my own point, but like listen, 10 cpas might have walk into that company. Nine of them were to walk right back out after five minutes. I mean, I brought a woman out to help me. I mean, who has dealt with Construction accounting and that, and she had some experience and she left crying after five weeks, not because of me because she couldn't take the stress of like this is a cat company with no cat. I'm like listen, you just gotta clean. Your corner is on one corner and that's it like you can't worry about everything else or else you're gonna are gonna keep in on you and, you know, and so, you know, I felt, you know, it was like, hey, listen, I get it like this isn't for you. But like I also started off in the startup space. So, I worked at a few consumer products startups. So I was used to going in like I used, I worked for this awesome CFO who was a great guy and friends still this day, but I remember that I, the first company that was car, you remember card scan, it was a business card scanner. You'd scan your business card in and we're going with this piece of software totally irrelevant today.

TANYA

52:32 Yes, yes, I do. Yes.

JIM

52:34 So that in actually that company, the president of that company he started, he founded ZoomInfo. Well, Zoom. Yeah.

TANYA

52:44 Yes, it all the time, but I hear them talking about, well, if I can't get you all to go on ZoomInfo and find their cell phone number? My God.

JIM

_{52:52} ZoomInfo is really powerful if you're looking like that started out as he took. I was originally a card skin, he took money. They had money. So the, you know, the board got together. There was some seed money that went into this Ali on technologies. And that's it started out as Liat and then more into Zoom info. I say I ended up, I was only there a couple of years and then I realized it left public too early, went back to public. And then the CFO called me again. I ended up going to a company called, well, it was originally micro optical, but it was, it became my view technologies. You have these goofy glasses we would wear and plug them in to the ipod when the video came out, right? And so this was before the iPad right before. It was like 2007, 2007 was actually the year of the first iPhone. And it was also the first time that apple stopped selling digital. Well, I didn't stop selling, but they started renting, you could rent the digital moving on an ipod. So it'll be crazy how fast the tech.

TANYA

_{53:58} I know how it really is.

JIM

_{54:00} So, listen, I don't wanna, I know, I don't know what you had for block here. I know I could, you know, I probably can talk sometimes. So, I'm gonna casually bow out now. But like I really enjoyed the conversation today and.

--- Accounting integrations ---

TANYA

_{54:14} Yeah, you know, a question I was gonna ask for you is, you know, we get a lot of these growing companies that sometimes they're like, you know, they're getting service trade and they've got Quickbooks issues. Is that something that you guys would, you know, we can potentially refer to you as we got people like because it's hard to find Quickbooks pro advisors that are in this space. I feel like that talk, the talk that understand it. And I think that there are a lot out there that, you know, could use, they do need help that we're not equipped to help them, you know, delve into their Quickbooks. And sometimes it blends in, you know, bleeds into, you know, more like accounting financial assistance that they need as well.

--- Accounting integrations ends ---

JIM

_{54:58} I would like. So I try, so what's interesting is, so the people that I deal with a lot of people I know that are setting the doing firms and stuff like that. They're trying to, they're trying to do this like nationwide approach. In my, in this list, you know, Ryan and mass in Connecticut, across border states. A lot of sales here is belly to belly and like it's people, I think people like having especially in the Construction base. They know the, hey, Jim and Ryan, he could be here in an hour.

TANYA

_{55:28} Yeah, yeah.

JIM

55:30 He could be here in 45 minutes and be on site if I needed to be. Now, I don't want to do that every day. But if I need to be there because you've got an issue and we need to go Bella, discuss it that's you know, so, but there's a I'm in a group with another, Tanya. So Tanya set is out of Arizona in round table.

--- Type of work ---

JIM

55:53 So round table is a bunch of Quickbooks pro advisors. But then they have what I call many tables or so. I'm in the Construction junction group. Okay? And there's probably, I don't know 10 to 15 people yet, but we're all Construction based, not all commercial subcontractors. Now, Tanya shot is she owns a company called the profit constructors Arizona.

--- Type of work ends ---

TANYA

56:22 Okay.

JIM

56:23 So, and she does a lot with noify, but service treats name has come up and Tanya and I have discussed it before, and a lot of types like Construction junction will have somebody come on. We have software companies, vendors come up, but we have a certain feature set of like, hey, listen here's. How our demos work. Like you, we're gonna tell you.

TANYA

56:44 Right. Yeah, yeah.

JIM

56:46 These are the points we're all familiar with. The basis. We don't need to. We're gonna, we want here's. The topics we want you to cover a lot of times. It'll be like, hey, we wanna know more about the Quickbooks online integration with. So it's one of those like if you said, hey, service, we'd love to go on there that's great.

--- Implementation and ongoing support ---

JIM

57:05 I would probably bring a technical person with you because some of the questions may get technical, know how comfortable you might be like, yeah, listen, bring somebody with me and say, yeah, someone get into technical integration questions or whatever. But it would probably be mostly Quickbooks online because that's what everybody's using.

--- Implementation and ongoing support ends ---

TANYA

57:24 Okay. Yeah. We would love to be on that and yeah, because we are working on that's our, on our 24 plan with integration stuff is to work on the Quickbooks side of things.

JIM

57:38 So I can, I'll ping Tanya, so in and say, hey, listen, I'll probably give her. Can I already, if I give her your contact info, absolutely. Okay. And I'll have her reach out. So if you get an e-mail from Tanya, you'll know like... but yeah, I would love like, you know, if you guys said, hey, listen, we're we've got a client. They're you know, they're in island. If they're in island for sure, Massachusetts, Connecticut, New Hampshire, like all that, like, you know what I mean? Like if that's like we had like notify had set a client, like notify sorta does, what bankers do is they send out like three names and they're like you can call Jim McCarty, you can call Tanya shot. You can call somebody else. And so like they said, there was a guy that was looking for work for his company, but it was like, I think it was out of Colorado and I just immediately said the site based on what you do and I said you should call Tanya shot and talk to her, you know? But like I try to stay, I just try to keep it easy. Keep it on the east coast once I start dealing with time changes because like just use part time, Michelle's part time. So like we get dealing with time changes, sometimes it gets hard to deliver or.

TANYA

59:00 Makes sense.

JIM

59:01 Leads and stuff.

TANYA

59:02 Well, that's cool that you guys have got a network because like you said, it's a lot of times. It's not super often, but it does come up. I, I'd be helpful to be able to just sort of hand them off something that because there are so many put books pro, advisors, but they may not specialize in anything in particular.

--- Accounting ---

TANYA

59:16 And then they don't know. I mean, the Construction accounting space has got a lot of uniqueness to it. You know? Yeah.

JIM

59:25 You gonna set up like, your sub customers and customers, how do you want that to? Look? What is it set up right now? Or like even on like that residential contractor, we were going back and forth on whether we were gonna do, we're gonna do a fresh QB database or modify existing?

--- Accounting ends ---

TANYA

59:43 One? Yeah.

JIM

59:44 Right. And like they've only been in QB for a couple of years. They're on, Wintac, bought by. FieldEdge seems to be like owned by this holding company that owns all this other stuff. So, it's not just FieldEdge. And the funny thing, is like, I don't know, I found them to, they seem like they're like this gigantic company in the way but they've got small clients and like maybe they have large clients too, but they have small clients and they can't really service them well because, they have this gigantic conference and like come to, I don't know what I forget.

--- Pricing ---

JIM

1:00:20 The conference is called. But like in the go there and then like they have this, you know, expensive training. Like do you know, full day training? Like whenever, I remember my days of being doing tax work with CCH and CCH was like big on like when they would sell you software, you need to pay 2,500 dollars a training on the software.

--- Implementation and ongoing support ---

JIM

1:00:40 I'm like why software should just work training for like maybe I need some training to like Construction training on implementing when you got a complicated setup. But like the software should work, people shouldn't have to dig in to really figure out how the software works.

TANYA

1:00:58 Right now, we offer a lot of a lot of, you know, self directed for especially with the Quickbooks users, a lot of certifications that they take, watch videos. Do things answer questions, get certified in the different areas of the product and do still work with the project manager and everything. But a smaller customer, they can move a lot quicker because they're using a lot thinner, you know, version of service trade.

JIM

1:01:22 Yeah, no, I mean, I think, and that's what's great. I noticed you guys have the certification program. Do you have a certification program for advisors?

--- Implementation and ongoing support ends ---

TANYA

1:01:31 We don't we don't...

JIM

1:01:32 That something you're thinking about in the future maybe?

TANYA

1:01:35 Maybe, I think, you know, maybe once we get a little bit bigger, you know, I think right now we're we really handle it all in house. So we've not gotten to the point where we kinda started to, you know, use outside resources for implementations or anything.

JIM

1:01:49 Yeah, you are in your own software but like... but it would be cool to at least because the funny, some software companies like they'll remain nameless but like don't, they almost think that the account is getting away. So they want to the software directly but I think it's a mistake. I think there's...

TANYA

1:02:09 I think it is too. I mean, that's a lot of why I'm here, you know, because that was, you know, very much the view before of the, this account, but everybody's accounting will figure it out, you know, pending. But I think that a lot of people look to their cpa their, you know, a CFO gets very involved with these decisions because it does affect accounting.

JIM

1:02:30 Yeah. And especially, I mean with service trade, I mean, okay, you're going after a certain market that market, you've already got a larger customer who's probably got larger volumes, a little more complicated, right? Contracts, stuff like that. There's a lot of pieces to understand and sometimes having enough muscle to lift that thing off the ground is, you know, it's always easier to lift when you got more people lifting.

TANYA

1:02:57 Absolutely.

JIM

1:02:59 But well, listen, this is, I'm gonna send, I'm definitely. I mean, I know, I'm sure that people are, you know, celebrate the new year and all that. But like I'll get in touch with them. I don't know when our next meeting is. Usually, we usually meet at least one, one Tuesday a month. I forget if it's the second or the third Tuesday, but I'll shoot this that your service tree name already came up as because I had said something the time like we need to get them in the Construction junction so we can sorta walk them through, you know, do a demo and that. And I mean, it's everybody's nice. We're not gonna. It's not, we're not there that got you like we're just there were just there to understand like I do right now, I got a real good feeling of where you guys fit and where I would use the tool.

TANYA

1:03:48 Exactly.

--- Accounting integrations ---

TANYA

1:03:49 I mean, it is that's how I feel. I mean having sold accounting software and getting, you know, I got all the third parties who are always after me and just being able to have all these different tools. So, when I talked to that customer, I wanted to, you know, get them the best tool.

--- Type of work ---

TANYA

1:04:03 Okay? It's gonna be Sage with this product as your operational tool, you know, because those are your needs because every contractor is slightly different. Some are heavier on Construction, some are heavier in service. Yeah, some only work for general contractors some, you know, don't so.

JIM

1:04:18 Yeah, cool.

TANYA

1:04:21 Excellent.

--- Type of work ends ---

TANYA

1:04:21 Well, this was, it was great to meet you both. And I hope you guys have a good new year. I'll send over. I've got the powerpoint, that I have, I'll send you over a copy of it. I just got a bunch of slides on, the software itself, and then these couple of slides at the end with more details on like our ideal customer in those things.

JIM

1:04:40 Okay, awesome. I really, this is a good use of time today.

TANYA

1:04:45 Excellent. I'm so glad. Well, you've got somebody or, you know, you got any other questions, you know, definitely reach out to me. I'm the best resource for you guys.

JIM

1:04:52 Okay, awesome. Thanks Tanya.

TANYA

1:04:54 Thanks. Happy new year.

JIM

1:04:55 Happy new year.

TANYA

1:04:56 Bye.

JIM

1:04:57 Bye.

The End