



# **ServiceTrade Demo with Cook Mechanical Inc**

Alec Ashby with Cook Mechanical Inc  
Recorded on 9/8/23 via Zoom, 1 hour 39 min.

## **Participants**

### **SERVICETRADE**

Alec Ashby  
*Territory Manager*

### **COOK MECHANICAL INC**

Jody Vowell  
*Director of Service*

# Topics

<i>Call Setup</i> .....	0:00
<i>Next Steps</i> .....	36:05
<i>Next Steps</i> .....	40:27
<i>Wrap-up</i> .....	59:37
<i>Pricing</i> .....	1:12:00
<i>Pricing</i> .....	1:18:56
<i>Pricing</i> .....	1:34:35
<i>Next Steps</i> .....	1:37:56

# Transcript

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

--- Call Setup ---

JODY

0:00 Hello there?

ALEC

0:01 Hey, Jody. How are you?

JODY

0:03 Doing well. How are you?

ALEC

0:05 Doing good, man. Doing good. It's Friday. So, always good. It's Friday.

JODY

0:10 Yeah, yeah, I've got you on my workstation here.

JODY

0:15 And my camera is on my laptop, which is, I think the service might be.

JODY

0:21 I route.

JODY

0:22 Somebody...

ALEC

0:26 I see. Yeah, because I can see myself. Yeah, I see myself.

JODY

0:30 Three 30, but Travis is here with me. He won't be able.

JODY

0:35 See.

ALEC

0:37 Okay.

JODY

0:38 Very good.

ALEC

0:40 Nice to meet you, Travis is the account manager, right?

JODY

0:47 Service manager.

ALEC

0:48 Service manager. Okay? Or?

JODY

0:51 On the side here, pop in.

JODY

0:56 Account manager.

ALEC

0:58 Okay. You're kinda coming in now that I can't quite hear you. I don't know if it's me or you?

JODY

1:03 Yeah. Hold on one second. We got a cool, little Mike that will help out, okay?

ALEC

1:11 You're good?

JODY

1:14 Can see here the... Christian.

JODY

1:20 Interaction...

JODY

1:26 All over what's the thing called? Keith? No 39. No here. That's the wife. I on wait there. It's already connected. Can cool. Can you hear me?

ALEC

1:40 Yep. Yeah. We can hear you better now. All good. So we have, I just wanna make sure everyone Keith Travis, and then you obviously Jody.

JODY

1:49 Yep.

ALEC

1:49 And Jody, are you the director of service over there? Or the president? I didn't know if we're both.

JODY

1:56 Well, I have been helping out in service. That was my role a year ago, was director of service, but I'm in the president's role now, but I'm still working in service as an account manager, helping to sell work along with Keith and Travis is relatively new to.

ALEC

2:17 Okay.

JODY

2:18 Got 60 day.

JODY

2:19 Yeah, and working in the account, I'm sorry?

JODY

2:30 The, we lost our dispatcher a couple of weeks ago, and so, yeah, this is our core team here who's done in service.

ALEC

2:42 Okay. Yeah. Nice to meet you go. And just to introduce myself, my name is Alec. I'm a inside territory manager here at service trade. I've been working with commercial service contractors for over a year. So essentially, you know, I had a really good conversation with Jody earlier this week. So I don't really have too many questions for you guys other than some people that weren't in the room when me and Jody were talking earlier. But essentially how this goes, I'll just kind of get an idea of your goals. I already have an idea of what problems you're running into, but maybe what are the most prevalent ones? And then once I get a better idea of kind of your evaluation, your goals stuff you're looking to fix, we can hop in the platform and I'll show you things that I think would be relevant to you guys today. Does that sound good?

JODY

3:27 Yeah, real. Yes, sir.

ALEC

3:30 Yeah. So, Jody, the thing I found most interesting when I was looking into you guys is the first time we talked to you guys, you're at four tex, then the second time you're at five. Now you're at eight. So it seems like you guys are growing pretty rapidly here.

--- Call Setup ends ---

ALEC

3:45 I mean, what, what's kind of your growth goals? Where do you kinda see this thing going? And what's kind of driving all this growth? Because it seems like you guys have grown quite a bit over the years.

JODY

3:55 Not not fast enough, we feel like, but, our growth goals we wanna be in five years. I'd like to, I'd like for us to be a 20,000,000 dollar service department, you know? And if you do the math on that, that's like 60 trucks or something like that. So maybe that's a little ambitious. But... yeah, we really, our business, is dependent on service. If, if it's going to have any value, we have to grow the service business construct we do Construction as well. But, you know, that doesn't really add value, to the business because Construction contracts, once they, once they're executed, they vanish, right? And, but service has a continual revenue stream and, that makes it a much more valuable business. So we're doing that through acquisition of maintenance agreements is, our kind of our CornerStone of our growth plans trying to sell more maintenance. And so we intend to keep doing that. Yeah.

ALEC

5:09 Gotcha. Yeah, that's good to hear because I mean, that's kind of one of our cornerstones of our product is we wanna make sure that you're getting the pull through revenue from those PMS as well as manage those PMS know what's PMS are most profitable. And I kinda knew that based on what we talked about earlier this week, so that's good to hear. I guess what's like the biggest thing that's holding you back? I mean, obviously, it's a pretty ambitious goal. You can definitely do it though. We have a customer that grew from three texts to 45 over the course of three years. But what do you think is the biggest thing holding you back from that goal? Getting there? Obviously, it's you know, there's a process you're not going to go from eight to 60 overnight. But what do you think is the biggest thing for maybe holding you back from getting 15 trucks on the road or 20 or getting that next step?

JODY

5:53 Getting the technicians? I mean, we can sell. I mean, we just, Keith just agreed to transition into a account manager role. He was formerly working in service management and, but Keith has some snap on the sales side too. So he's selling. And so now there's you know, two of us kinda hitting the street, trying to turn over rocks and sell work. So we feel like that's gonna yield, some pay dividends pretty soon, but I think we're going to quickly but up against our capabilities, manpower wise, and

getting good techs aboard. I think we'll be the next... bottleneck that we go through. I mean.

ALEC

6:40 Yeah.

JODY

6:41 From...

JODY

6:42 Experience, you know?

JODY

6:43 I agree. Yes.

JODY

6:43 Yeah.

ALEC

6:45 Yeah. It's tough out there right now. You know, what the labor shortage there's like eight percent of technicians leaving the workforce every year, you know, whether it's retiring or younger folks not going to school for the trade. So definitely get that because it's definitely something a lot of our customers struggle with as well.

JODY

7:04 Now.

ALEC

7:05 Travis, I know that you guys are down a dispatcher and, you know, Jody said that there's like, you know, that's kinda causing you guys some troubles. What's kind of some things in your day to day? You're looking to streamline or make it a little easier. What's kinda going on with you? Especially you being newer. I'm sure, I know when I was newer to service trade, I was learning every single day. So I could only imagine for you. But like what's kind of things you're looking to improve on your day?

JODY

7:26 I...

JODY

7:27 Think, the scheduling of work orders is my biggest achilles. Right now, we're using outlook, and different platforms. There's no uniform way to schedule out the text can't make notes in that same work order and then build from it. So it's kind of a hot scotch of information just to get a call, an intake, and build out the door. So

something a little with a few less steps, you know, a few less platforms to hop through and all that good stuff would be my biggest hurdle.

ALEC

8:08 Yeah, no, that makes sense. I hear a lot of that from people like you to walk me through. So, if you're scheduling out a work order, are you scheduling it on outlook and then writing a paper ticket as well? Or what are they actually using in the field? Are they using the outlook just to see their calendar and something else for the work order? How is that in?

JODY

8:28 I go?

JODY

8:29 We dispatch the service ticket or the service call the, you know, the details of it through outlook through a shared calendar. They write up paper tickets and then they turn those in once a week. And then from there, you know, the time and information has to be inputted, you know, identical and accurate and then sent out the door. So it's...

JODY

8:54 And in addition to that, they're sometimes we'll send out emails with pictures, you know, with information, you know. So it's in multiple places. It's fragmented data. Yeah.

JODY

9:09 And we can, if it's if we send that information to one guy, it's not, it's just to him. So if we send the next guy, you know, we got to resend all the information. There's no database. He can reference through a work ticket or, you know, some kind of internet or anything like that.

ALEC

9:29 Right. So, I'm assuming what you're getting at is if they need like service history or if they need information about the location, they're having to call you. And then that's probably creating some natural inefficiencies as well. In the back end. I'm sure sometimes either delayed billing or just the billing process might be a little clunky. Is that kinda all what's going on or?

JODY

9:50 Yeah, yeah. The billing process is not very user friendly from my limited experience with it and it has to be transcribed from a paper ticket. If we could just, you know, have one stop shop that would make streamline the process.

JODY

10:11 A little bit.



ALEC

10:14 Yeah, we can definitely do that. And are you guys billing out a Computerease or are you billing out something else right now?

JODY

10:20 Computerease?

JODY

10:22 Okay. That's the worst part. The worst part Computerease is billing, it's very cumbersome. And if you fuck it up or the customer wants you to discount the ticket after the fact, you can't go in and make an easy revision and redo it. You have to actually start from scratch, and redo the whole invoice so it's not, they don't make it easy. We're looking for something a little more simple to use.

ALEC

10:52 Yeah, cause, and I hear that a lot too because some of our customers use Computerease and FieldEase. And then they get something like service trade because they, I've heard some bad, you know, some mixed things I should say about FieldEase. And the thing about Computerease is it's a really good ERP, it's really good for managing the Construction, but it's not really built for a scaleable service department. Like some of these softwares you've already looked at service trade were built specifically for service and billing for service is a little different than like Aia billing Construction job or, you know, something like that. It's going to be a little different service, you know, you're trying to, once you complete that job, our highest performing customers usually getting that invoice out within two to four business days usually is what they're trying to do. Computer is isn't really designed for that. So we can definitely help out with outstanding Ar, that's for sure. And then as far as the PMS, I know we talked a little bit over that over the phone Jody, but is that, how are you guys scheduling those out? Is that through like a spreadsheet tracking what are due? And then using outlook? Is that kind of a separate system as well or?

JODY

12:01 Correct.

JODY

12:02 Right. Yeah. So, it's fragmented and sometimes it's out of sight out of mind. And then we wake up one morning fuck when's the last time we routed to that job, you know, jeez we better go, we.

JODY

12:14 Better.

JODY

12:18 I can work well.

ALEC

12:20 Gotcha. Yeah, we'll definitely wanna get those moments, minimize those. So, yeah, yeah, we'll definitely go through how we kinda do that. There's multiple ways to do that through our platform. And like I said... like I said, you know, PM management or, you know, capitalizing on PMS is a huge priority for us. It seems like it's a huge priority for you. So there's definitely some alignment there and I'll walk you through some of that today. Is there any other? You know, I know we talked to bunch Jody about different things we could help out, but is there any other huge prevalent problems? Because I'm sure we could sit here and talk about your workflow all day. And, I don't wanna do that. You know, I wanna make sure we're getting into it, showing you what you're really here today for. But is there any other big problems you guys are having with your workflow or things that are preventing you from scaling that you kinda wanna address right now?

JODY

13:09 It's not well, it will be a problem. It's kind of a problem. We have, we just got on board with this new timekeeping app called exact time. You familiar with it but, and we have our service guys on it as well. But, and it's a relatively cheap program. All of our employees have the app on their phone and they clock in and clock out on their phone including our service technicians. But we would rather not have to sign up our tech. The good thing about it now is exact time gives us kind of a geofence... when they're clocked in, we can see where they're clocked in at the exact location of where they clock in and where they clock out once they clock out of exact time. Then, we don't have any tracking, but I think at some point in time, we do want because of the auto liability that we have with all the trucks on the road. At some point, I think I would like to see us getting away from exact time for the service text and just using it for our Construction guys and use the clock in clock out feature, of something like service trade that also works with a, you know, those obd or plugin GPS trackers. You can put in the in vehicles that's something that works with, that we can, you know, use for geofencing... driving. And also we give our customers kind of like a heads up page, you know, Bob accepted the call. He's 15 minutes away or whatever. And it goes to the customer's e-mail that kind of like the Amazon experience, you know, your packages is being shipped and we'll be there in two days, whatever we, from, that next level customer service standpoint, we kinda, we want to be like Amazon, you know, and compared to our competition, you know, we want to provide a better customer service, better customer experience, I guess. So we're looking for things that can provide that at a competitive cost.

ALEC

15:32 Yeah, you said a lot of good things there. So I'm gonna kinda break that down because there's kinda each part. So as far as the Amazon experience, I looked at your website, it doesn't seem like it's a Wordpress website, but we do have a customer portal. If that's something you're interested in. It is a Wordpress plugin. It's a good selling tool. It doesn't seem like you guys are having too many issues selling though, but essentially, the customer can log into your website, pull up some quotes invoices that's kinda Amazon. There's other things in our platform too that can help you provide that experience as far as GPS tracking for the trucks service trade does not do that. But if you guys did move forward with service trade, I know you looked at quite a few others, but, you know, we have a lot of partners like one of our biggest partners is a uga. So that's one we play with. It's a pretty popular one. And then as far as time tracking, depending on the level you need with that, there's definitely ways we can help out in that department as well. So you're not relying on another app and kinda consolidating tools. But all the stuff you said right there, we either have, you know, partners or that stuff we do are prioritized.

JODY

16:38 Stuff like that. Yep. So, so the, from, if we got service trade there, there is an app to text would have on their phone slash iPad, and do they have a clock in, clock out feature with it? Or do they, or do they just have to manually enter their time after the call? Because the last one we looked at service? Which one was it? I don't know BuildOps or no. Was it service trade? I can't remember which one we looked at?

ALEC

17:11 They're all the same?

JODY

17:12 Thing actually field is actually a FieldEase. Field, FieldEase. We actually have to detect has to manually enter their time in, start and stop time at the end of the call. And we're relying on them, to do that versus clocking in, you know, when they get to the site, or the supply house or the shop, if that's their first call and then clocking out and clocking into the next call before they leave to go to the second call of the day. We want the tool that's gonna do that. So that and everything will, you know their time will be based on their clock in clock out. And if they're you know, if they fuck up and don't clock in that's on them, right? I mean, of course, we'll fix the time but we'll make it painful.

JODY

18:00 Yeah, a form or some.

JODY

18:02 To get their time fixed. But so that we're not chasing time payroll on Monday mornings, you know?

JODY

18:10 Is there a GPS feature? When they, when the text clock in with service three, will it stamp it if the GPS of the device is turned on?

ALEC

18:19 Yeah. So we have a GPS snapshot. So like any time they log a clock event, I'll take a snapshot. The reason we don't track it live is because that would drain their phone battery. And then to answer your question Jody. So we have multiple levels to do that depending on what level you need. But essentially the way most of our, and there's also multiple ways to do that. But the way most of our customers are doing it especially for the PMS, they usually have an idea of how long they'll be out there and the tech will go out there, clock in, clock out. Someone in the office will review the time, make sure the time matches what you're billing. Obviously if the clocks in for more time, you might want to call me like, hey, did this actually take four hours or whatever? And there's kind of checks and balances where most of our customers are using the clock events for internal reference, and they're using that to reference the billing hours. Now, as far as payroll, if you're doing that, you know, you can do that through service straight core. There's all kinds of reports. You can run on clock events for certain technicians if you wanted to take it to another level. We do have add on it's called service time card. The reason it's called time card is because as I'm

sure, you probably know, you know, back in the day, but before all the software, you would like turn in your time card right on paper, essentially digitalized that process so the technician can submit his time, someone like Keith or someone like Travis back in the office could review it, approve it before putting it into payroll or something like that. So that's kinda the next level verse version. Some customers start off with that depending on the level priority. Some just grow into that, you know, because changing the service trade can already be kind of a lift, you know, going from paper tickets to an app. And, you know, changing all these processes, a lot of customers kinda start with our core product because there's a lot of value in our core product. And then there's you know, things like time card that they can grow into to kind of streamline those things. So you can have some options with that. I hope that was not too long winded. It'll be easier to show you that than tell you about it. But, yeah.

JODY

20:26 Yeah. Let's get into some demo here then? Cool. Okay.

ALEC

20:29 Yeah, for sure. And the last question before we do that, would anyone else from your team need to get involved if you guys like what you see today?

JODY

20:37 No, no.

ALEC

20:41 Okay.

JODY

20:41 If we like it, we think this is the thing we'll take the steps to move forward. Cost is going to be a big issue. We have to, we'd like to see that at the end, but let's see what it can do first.

ALEC

20:56 Yeah, yeah, we'll absolutely do that. So if you guys just give me a sec... I just got a few brief slides just to give you a little bit more background on us. Just because I know it a lot of these platforms, it can be easy to get a mixed up, just give you an idea of what we do, what we prioritize. But just kinda my agenda for today. I figured we go through the office view first kinda show you some things as far as PM management, customer management. Then we'll hop out to the field. I'll show you the mobile app, how your technicians can report, repairs, get pulled through revenue stuff like that. And then I'm gonna sprinkle in some customer facing stuff as well throughout since I know that's important to you. And then if we still have time in the end, we can go through pricing next steps, all that good stuff. But kind of like you alluded to, we're very familiar with there's a 40 percent, you know, shortage of technicians in the workforce. It's not easy right now to hire technicians. And, I like, I kinda just told you guys there's an eight percent loss of technicians in the workforce every single year. So a lot of our customers are trying to get the most out of the technicians they have on staff now since it's so hard to hire them stuff like that. And

really what that means is that the gap between the demand for your work or the amount your sales staff can sell and the amount of technicians you have on staff is growing every single year. So that's why that, you know, technician productivity is so important. Now, as far as us, you know, a lot of people come to service trade to control costs, right? Whether that's you know, just streamlining your operation or setting up your technicians for success, giving them less apps to interact with, not having them have more meetings or driving the office at the end of the week to turn in their work orders. So we can definitely do that. We can definitely help you control costs. But really what people realize once they sign with service trade, once they go live is that they can grow their quality revenue keyword being quality and we'll help you guys, you know, sell more service agreements which it seems like you're already doing a great job of as well as grow profitability, like what customers are your highest profitable customers? What customers do you maybe need to think about? We don't want to renew with them at the...

JODY

23:07 End of the year.

ALEC

23:08 Service trade will give you visibility on all that in.

JODY

23:10 Stuff... the...

ALEC

23:14 You ever have customers that don't pay bills or kind of hard to work with or?

JODY

23:19 Yeah, we have a few of those one or two.

ALEC

23:23 Yeah, I mean, everyone does. So, no worries. But anyways...

JODY

23:28 Try to throw them away but they keep coming back like boomerangs.

ALEC

23:37 Yeah. Something about, you know, sales and it's like you don't want to sell to them. It's like they want to buy more. It's it's a weird thing. It's very counter. Intuitive. It's like we don't want to do business with you guys and then they'll want to do business with you more. It's like I couldn't I didn't make any sense but it's at least been my experience at times. So I get that. But anyways, this is like the five major areas of the business will affect, I'm gonna kinda briefly touch on each of these because we'll definitely get through some of these in the demo. But office coordination really the main way I see this giving you guys value you'll have a central database for all your customers, as well as you'll be able to track your PMS, know

how you're performing against the contract and what PMS are due, as well as, you know, scheduling stuff like that. There's stuff that's going to kinda unify your process. You're not using so many tools... as far as the technicians will give them access to service history. So they'll be less phone calls back to the office, less referring to Computerease to see what we did last time. And there's other things we can do. But really the main thing in here is that will make it convenient for them to report more repairs and get more opportunities for you guys to send out quotes for pull through revenue.

JODY

24:53 Back off of.

JODY

24:54 That...

JODY

24:56 Section...

ALEC

24:56 Is...

JODY

24:56 There a way to like grade the test or test?

JODY

25:02 Productivity as like a percentage?

ALEC

25:04 To see maybe?

JODY

25:05 Which text, are meeting our?

ALEC

25:11 So there's just like anything in service trade, there's different levels of service trade, different plans, stuff like that. There's some for like the plan I'd most likely recommend for you guys, there's some high level stuff. But as you grow with us and, you know, maybe you upgrade your plan, stuff like that, you can get really nitty gritty with tracking technician productivity, like what technicians are reporting, the most efficiencies, what technicians are, you know, completing their work on time, what technicians are, as well as one thing we just rolled out this week actually is you can even make like, you know, if you, your text to always take before and after pictures on a work order, there's kind of a way to put digital handcuffs on them as well.

JODY

ALEC

26:01 And customer communication, this is kind of that Amazon experience. You guys were kinda speaking of that's something that we take a lot of pride in. So if a portal is something interesting to you either now or later, you know, that's something we offer. But in any plan of service trade, you know, we got quotes that are easy to approve mobile friendly. So your customer can approve it, put it in a purchase order numbers. You're not chasing that down invoices. They can pay right then and there with AC, H or credit card. You know, you got in route notifications. I know that's something you mentioned if you want to send them an e-mail letting them know you're on the way. You can do that as well. I'll sprinkle some of this in throughout the demo today... measurement visibility. There's all kinds of quote reports. So what quotes do we have out? What quotes are out there that we need to get a response on? What do we have to do next month? There's a variety of reports. And like I said, earlier service trade will give you that centralized database. And then sales success. Really the main way that a lot of our customers justify paying for service trade is for, from the pull-through revenue. The way they kinda think of it is the...

JODY

27:08 Can...

ALEC

27:08 Even get two to four more pull-through quotes approved every single month. Service trade is already paying for itself. And most of our customers are getting more than that. But, and then the last slide here, we only work with commercial service contractors specifically mechanical and fire and life safety. And we also are a niche product and that we typically work with a lot of customers that do a lot of PMS or inspections stuff like that. And we've been in business for over 10 years, have had multiple rounds of funding. Cool thing about that is anytime we get funding, we're putting it into workflows that helps scale service departments, not like Computerease or Sage or something like that where their product developments kinda diversified, ours just goes to workflows to help you guys out. And then we also have over 1,000 live accounts in the US and Canada. Keyword being live. There's a lot of software platforms that have a lot of customers, but that doesn't mean their customers are live. So, we have a lot of customers that are live here in the states and Canada that's just a little bit more about us. Unless you guys have any more questions, I can hop into it, but you have a question, go ahead.

JODY

28:18 13,000,000 assets managed. What, what do you mean by that?

ALEC

28:23 So, asset in service trade is a piece of customer owned equipment. So that's basically saying is, you know, we work with obviously a variety of customers and they have a variety of equipment they service, is that?

JODY

28:35 That's in user equipment value?

ALEC

28:40 No, it's just simply the amount of assets.

JODY

28:43 Number of assets? Okay. I was about to say that's not, we're gonna do that alone. Yeah.

ALEC

28:50 Yeah. No assets here in North America.

JODY

28:53 13,000,000 pieces of equipment. Okay. Gotcha.

ALEC

28:56 Yeah. Yep. Any other questions or comments or?

JODY

29:02 Yeah. I got a question.

JODY

29:03 So, if...

JODY

29:05 Decide to pick service trade would?

JODY

29:09 Like this be included?

JODY

29:10 Or is that extra?

ALEC

29:12 When you say sessions, are you referring to like onboarding or what do you kinda mean by session?

JODY

29:17 Like technical support?

ALEC



29:19 Yeah. Okay. Yeah. So if you were to move forward with service trade, the support is included. So there's multiple ways we give you support. One, we give you a designated account manager that's here in the states. We're based out of Raleigh, already used that's where most of our account managers live. So you have an account manager that if you're ever interested, you can even have a quarterly meeting with them. And that's where you can kinda go through things like how are my technicians performing? How, you know, they kinda have more access to the data, but also to you'll have customer support. So you have customer support whether it's submitting a ticket or calling in you'll have access to support as well. That's not extra. And we're definitely not like a nickel and Don company either. So we're not gonna, you know, stock in see how we can pinch pennies out of you. I don't know if there's any other companies that are doing that to you, but we're not going.

JODY

30:11 Of those... yep. Okay. Cool.

ALEC

30:16 So I'll go ahead and I'll hop into it here guys. So as far as service trade, there's essentially three major views. We have the office view, the technician view, and the customer view. I'm gonna start off today in an office view and I'm gonna look at a PM contract. So this is a PM contract for target. You can either have a universal contract for all your customers or if you need some for specific ones for specific mark up rules, you can do that as well. But this is where I can set my mark up rules for all my targets. And as well as you can see the actual margin versus the expected margin. So I can see how much invoice revenue I've made off this contract. What I was expecting? How I'm actually performing? And the idea is when you're you know, renewing or looking at the end of the year, kinda thinking things through thinking about next year, you'll have visibility on what contracts are doing well, what you're kinda doing okay, and then which ones are not doing too hot. So you'll kinda have an idea on that. That way you can prioritize the work. Since there's a labor shortage, you'll be able to prioritize the customers that are making you the most money and helping you guys grow up the most. So it's just kind of an idea of what a contract...

JODY

31:36 Looks like.

JODY

31:38 Okay.

ALEC

31:41 I know you guys kinda mentioned kinda having a central database for all your data. So essentially in service trade since we only work with commercial service contractors, we understand that the person you're billing isn't the person that you're you know, servicing typically. So that's how we organize our customers. So for example, we have a Bill to. So this is my target Bill too with my contacts for billing. And then I have my five physical locations that we service. So each physical location will have its own page with its own contacts, own information. But it'll all live under this one corporate.

ALEC

32:31 So if I go ahead and click into a location page here, this is basically... one a location page. So there's a lot of things on this page. If there's anything that stands out, let me know and I'll feel free to explain it. I'm gonna kinda run through the main things though especially things that we stand out from other platforms because I'm sure you've taken a look at a lot. So one of the ways we help out a lot of our customers is with the PM. So you already saw a contract on how you can see how you're performing. We'll also make sure you're scheduling it out and keeping track of the equipment you're working on. So just as an example here, this is an example of how you could set up a PM. So this is a PM for my target in Pittsburgh. So I can tie it to a specific unit. So I'm tying it to east rooftop unit three. I can put a specific pricing contract. So what mark up rules do I want to apply on this? PM? I can put a brief description of what's typically on the work order. So what tasks are we doing when we go out to do this? PM? I can put a scheduling frequency. So how often am I doing this is?

JODY

33:47 Quarterly...

ALEC

33:48 Is it a monthly semi annual? And then I can put my parts labor item? So what parts labor items am I typically using when I go out to do this... cool thing as well as we're a very template friendly platform. So if you have similar PMS at multiple locations, you won't have to manually type these up every time. So you can see I have quite a few in here. And the idea is that we set this up once and we forget it. So service tree will put it on a rolling clock. So between the dashboard and other reports we can run, we'll never miss an opportunity to do a PM. And then we go to create the work order. It's about 80 90 percent of the way there. All we might need to do is make some slide adjustments before dispatching out the work order. As far as that, I know there was a little long winded. Do you guys have any questions on that or any initial impressions or?

JODY

34:47 What view are we in right now is just like office view still?

ALEC

34:52 Yep. So this is the office view. I set up a PM in the office and then I'll show you what it looks like for the tech in a sec. But this is just how you'd set up a PM kind of the general concept.

JODY

35:03 Okay. Yeah.

ALEC

35:07 And then, you know, speaking of reports, like let's say for example, that I wanna see, hey, what PMS are due next month? There's all kinds of filters I can put on this. But just to keep it simple, I'll just go here and see, hey, what recurring services do I have due next month? What ServiceTrade is gonna do is pull all the recurring

services based off the presets you guys are setting. So for example, here on this cosco in Texas, I actually have two PMS due. So instead of going out two separate times and wasting that gas, I could just go out there for one visit, get it knocked out in a day? Or if I just want to create these work orders in bulk, get them in the system. So I can start scheduling them out. I can actually check this box here on the top left. And I could create these work orders in bulk. So, and then that way, you know, I'm not having to manually write all these up on like a paper.

--- Next Steps ---

JODY

36:05 Or something like that. Is there a way to auto schedule out these PMS? Like if we assign them a eight hour allotment for PM number one, will it auto schedule out, to a text availability or do we have to do that manually?

ALEC

36:28 So, are you saying that? Is there a way to basically have an idea of how long the PM is? And then that way when you schedule it, you're scheduling it correctly and I understanding correctly?

JODY

36:37 No. If we know how long the PM is gonna take and we say it's gonna take eight hours, will the system find an open eight hour slot... automatically? So if we're doing it in bulk and we got 50 PMS and 50 guys, can it auto schedule them out through into their open slot?

--- Next Steps ends ---

ALEC

36:59 So it's not gonna automatically do that. The reason is because you know, you might not break fix calls, come in or, you know, stuff like that, what it will do is when you set up these PMS, there's a couple of things you can do. You can set a preferred technician. So if you have a preferred tech that works at that site, you can set that, you can also have an estimated duration. So if it is eight hours, you can put that there. And when you create these in bulk, what it's basically gonna do is put it in our map based scheduler and on the map based scheduler, you'll be able to drag and drop the jobs and the jobs will be able to tell you hey, how long is it? Where is it? Stuff like that? So that your technicians, it's not gonna make your routes like analytically as fast as possible, but it'll make your routes a little bit faster than probably what?

JODY

37:50 You're doing now? Okay. Yeah, cool.

ALEC

37:54 Well, do you think this would help you guys make sure that no PM slip through the cracks and, you know, manage those, what's kind of your initial impression on this? I know this is pretty important to you guys.

JODY

38:05 Yeah, this would help with, yeah, for sure.

JODY

38:09 Looks like the setup is crucial here. Yeah.

ALEC

38:15 Yeah. And that, that's why we give you a implementation point of contact similar to your account manager would be in the states. They'll we'll help, you know, train your team, people using this when you onboard with service trade, you know, we'll make sure that all your data from whatever systems you're using is getting in. It's a collaborative effort. So we don't just hand you the tool and make you go swim in the deep end. We'll make sure that you are learning how to use them. We'll give you the training you need. But yeah, it's definitely, you gotta make sure that it's set up right initially for you to get the most out of it. So, yeah.

JODY

38:49 How do you open up a new work order? Like let's just say it's a demand service call comes in. What, what is it? What does the dispatcher have to do to start a work order?

ALEC

39:02 Yeah, yeah. Good question. So there's a lot of ways you can do that. I mean, notice here basically what we call work orders is jobs. I could even add it right here if I want, but for that specific use case, probably the dispatch board would be best for that. So the dispatch board, this is good for reactive scheduling, knowing what's going on the, you know, business today. So obviously these would be your technicians, stuff like that. You can drag and drop similar to other scheduling tools. I'm sure you looked at. But if I had a job come in and I'm on the phone and I wanna, you know, schedule it out, create the work order. All I have to do is just simply click this ad job button... for example... if I click this target, pittsburg, I'll pull up my primary contact, all the simple information. I have a choice to schedule it out or just get it in the system. I have a choice to assign it to a technician or not assign it to a technician. And then I also, I can either dedicate it to a specific piece of equipment so I can build out history or if the customer doesn't know what equipment is pertaining to, you can always just tie it to the building, but you can always look here at the right, to see, you know, who's available, where, where's the white space and then dispatch it out from there?

*--- Next Steps ---*

JODY

40:27 Can you show how you would carry a call over to next day? So say there's a service call. It goes out there on Monday, doesn't finish it, but, I wanna see that on Tuesday schedule as well, how you do that?

ALEC

40:45 Yeah. So you could do that in here. A simple way to do that is if you click details and you click this little time, I just wanna make it tomorrow, just simply click tomorrow. That's one way to do it. If you want a little bit more drag and drop visibility... give me one sec here. Like I said, we also have a map based schedulers. This is typically more used for or... weekly scheduling or plan maintenance as well as this gives you weekly visibility. Now, one thing I will say is one thing on a road map is we are revamping a lot of this stuff, but all of our customers are using it now and it was designed for a purpose, but we are revamping some of this stuff as well, just, you know, so for example, if osela didn't finish the job at eight a. M on Tuesday and we need osela to go out on Thursday, I'll just simply drag and drop a.

JODY

41:45 It up Thursday?

JODY

41:48 Is there a way to keep it visible on Tuesday? So if I want to reference this and say, hey, what did Jose do on Tuesday? Because I have short term memory problems that's gone. So his calls to taken away. So can I have it displayed in both places?

ALEC

42:05 Yeah. Why, why would you want it in both places? Just so I understand correctly?

JODY

42:09 Well, assuming that Tuesday was history, he was there, you're scheduling a follow up day on Thursday, you're not moving the call, it was just, it turned into a two day call.

ALEC

42:21 Gotcha. Okay. Yeah.

--- Next Steps ends ---

ALEC

42:24 So essentially, if you click on this job and we click edit job, it'll take me to the job and we have this concept in service trade where you can have a multiple service job, meaning that if you're doing multiple PMS or multiple service, you can do that. You can also have a multiple appointment job. So if I wanted to add an additional appointment, I could add an additional appointment here for the seventh let's.

JODY

42:54 Okay.

ALEC

42:55 And then if you need to either just finish out the work they didn't finish, you can do that or if it's a new service or something like that, you can do that too.

JODY

43:02 I got you. Okay. That makes sense.

ALEC

43:07 Cool. As far as the last thing I'll show you in kind of this office view before we go to the field is these assets. So basically service trade will give you the ability to track your customer own equipment. The reason our customers think that's important is one, it limits phone calls from your text back to the office. And two, it helps you make those professional recommendation. So, for example, if your customers had quite a bit of issues with their capacitor or compressor or whatever, essentially, you'll have visibility on that before I even click into this at a high level, I can see all this information, but each piece of equipment will have its own page. So, for example, this is east rooftop unit three. I can put as much or as little information as I want about this unit? So you can see some of the fields I put in, you know, I have filter size, filter, quantity, warranty, date, install, date, all that good stuff. But you can see other stuff here too. Like what PMS? Do I have tied to this piece of equipment? What work orders do I have tied to this piece of equipment? Any deficiencies or pull through opportunities that we've ever reported on this piece of equipment?

JODY

44:30 Can the asset details be imported from the field side of this?

ALEC

44:37 Yep. So service trades very permission based. So if you want your text to keep gathering more information about these units, they can absolutely do that. So they can add one from scratch or add additional fields if they want to.

JODY

44:49 Okay, cool.

ALEC

44:52 This database, you guys have tried to?

JODY

44:54 Before?

ALEC

44:55 Or have now, has this been something you guys have wanted to do? Just curious if this is something of interest for you guys?

JODY

45:02 Computer. He has the ability to track equipment... but we haven't been using it because it's...

JODY

45:12 It has to be inputted from the office and it's labor intensive key stroking each, you know, model, serial number for a site that may have 100 pieces of equipment. So if we can do it on in the field on site at the time of looking at the unit, that would be ideal and the most accurate way to do it? Yep. Let me.

ALEC

45:38 Right. And where do you see the most value in this? Is this just seeing in the office? Is this for your tax? Like why do you guys really want to get this information for us specific?

JODY

45:47 I think mainly for, to have history on equipment, if there are call backs, or, you know, repeat problems in the same piece of equipment, you want to be able to track that?

JODY

46:01 We can target, we can target customers with aging equipment as part of capex, you know, stuff. You know, our side has 10 pieces of equipment that are 20 years old. Sounds like we need to send them a quote for some stuff.

ALEC

46:17 Yeah, I know. I agree. Yeah, it sounds like there's some money to be made there for sure. Yeah. No, this will definitely give you that ability.

JODY

46:26 Yeah. And for tech and it's you know, we want the work assigned to the right serial number for warranty purposes, for all many different things. Yeah, both office and field.

ALEC

46:39 Okay. Yeah, we can definitely do that.

JODY

46:45 At the same tech doesn't go out there exactly. They can look at the history of that has been done. Yeah.

ALEC

46:56 Cool. Well, unless you guys have any more questions, what I'd like to do is what we can do is we can go out to the field. I set up a PM job for today. Notice that all that information transferred over the work order, the unit, the description, obviously, if I need to make any adjustments, I could, but unless you have any questions or anything that catches your eye, you have a question about what we can do is you can go out of the field and I could show you the technician side of this to show you what your technicians would see and they work on.

JODY

47:26 Yeah. Let's do that.

ALEC

47:27 Okay. So you give me a sec, guys. I'll just stop sharing my screen here now while I'm pulling this up. Like I told you earlier, this can be used on iPhone or android, smartphone or tablet. What you're basically seeing here is this is what the technician will see, right? When you guys were, right, when your tech logs into service trade, I filter the work orders by today. There's a variety of ways that could filter these work orders on how to show up. But I just did it by today to keep it simple.

ALEC

48:04 Now, if I click on this work order, this is basically what a work order looks like in service trade. As far as the bottom here, there's three major ways you can track time. It's up to you if you wanna use all three or just one. But we have a job prep we have in route. We could also send our customer and in route notification. So, for example, if I wanted to send Jody, like, hey, I'm coming out to the site right now, I could just send him an e-mail right then and there. Then I also can clock in on site and then the clock in on site. You know, I know you guys kinda mentioned this earlier that's what's going to initiate that Geo snapshot. So it's gonna tell you, hey, Alec is a slacker. He's 300 Miles away from this site, might be a tough phone call to Alec.

JODY

48:51 Yeah, that's what I was wanting to use it for. Where are they physically clocking in? Is it at a job? Is it, in their bed, still at the house?

JODY

48:59 Or what or?

ALEC

49:00 Wendy's? Yeah.

JODY

49:02 Yeah. Exactly. When are they clocking out? Are they doing it at the job? Yeah.

ALEC

49:06 Yeah. So, yeah, I'll do that for you. Do you guys ever run into that or is that just kind of like, you don't know?

JODY

49:13 We, we can have it through exact time. We can see where they clock. We have the geofencing capabilities, but if we get away from that, we don't want to lose, that visibility.

ALEC



49:25 Yeah, that makes sense. As far as this app, I'm gonna kinda go through the major things. If there's anything you have a question about, just let me know. But the first thing we have here is our services. So this is what unit we're working on and what we're here to do. So we can see that right here. Real quick. Next, we have these site specific comments. So you can set these site specific comments. These are designed to limit communication from the office to text. So if you have a gate code, they need access to or something along those lines, they can do that here. They can also leave any comments they might want to leave as well. So they can do that.

ALEC

50:11 If your technicians or anything like the technicians I talk to typically though they don't like to do a whole bunch of admin work. So if they ever want to like just record an audio memo, just letting you guys know what happened on the job or whatever they can do that. They can take videos pictures as well. They can do all that stuff here.

JODY

50:31 How much of the app is usable if, the device doesn't have service?

ALEC

50:38 Yep. So about 99 percent of it. So essentially, if they don't have service, the way that works is as long as they had internet when they woke up in the morning or whenever they check this app, they'll load all the work orders for them, so they can log deficiencies, they can make comments, take pictures, all that good stuff. It just won't come back to you guys until they get signal again. So let's say they're driving in the middle of nowhere. Do the job, get back to somewhere with signal, then all that will push back to you guys.

JODY

51:08 Okay. Yeah, they, yeah, they, we do some stuff in schools that doesn't have good service. I wanna make sure they're not having to manually input this after the fact, and that they can still do this stuff on site in front of the equipment.

ALEC

51:24 Yep. So they'll be able to do that. You won't have any issues there with that for sure. So, you know, they can also see those assets I mentioned earlier. So this is kinda the tech view of that. They can not only see the asset they're working on today, but they can also see all the assets that you guys work at this location. So if the customer has a question, they'll have access to that information.

JODY

51:50 You know, customers like to add things when we show up to.

ALEC

51:54 Right, right. Like they think they called about something and then they thought they called about 12 things and they call about one or something like that, right? Yeah, yeah, we'll give them that information there so that they'll have that if they

need it, you know, if your text, you know, when the text find repair opportunities, if it's common for them to kinda tell the customer, we'll probably send you a quote, they can, you know, look through these deficiencies too and be like, hey, the last time I came out here was this morning, obviously, it wouldn't be that urgent, but we found a compressor, you know, issue. You keep having this issue, you know, you might want to replace it or something like that... or they can just simply see service history, what happened the last time? So they're not playing phone tag with other tags or calling the office. Just another way to maybe get them out on one more job, a day, month, week, stuff like that. And then they can look at all this information. If they need to edit any of it. They can, if they need to add an asset from scratch, they can. And it's kind of up to you guys on how much power you wanna give them for lack of a better term.

ALEC

53:07 Do you think this would help out there day to day or like what do you kinda think about this app so far? I know we kinda went through a little bit.

JODY

53:15 I think they would like it once they got used to it.

JODY

53:21 Can, can they leave pictures and notes on here?

ALEC

53:25 Yeah. So that's where the...

JODY

53:27 Section?

ALEC

53:28 Is so comments, if they wanna leave any notes or comments, they can already did an audio memo, but they have some other options here too.

JODY

53:38 Okay. That was in the... okay.

ALEC

53:43 Got it. Yep. So that's in the attachment section.

JODY

53:46 That, that's okay?

ALEC

53:48 That's...

JODY

53:49 Within that work order or job number?

ALEC

53:52 Correct.

JODY

53:53 Them, how many pieces of equipment that's in the assets, how many things they need to take care of the, that's the job items?

ALEC

54:01 No, that's the services that's the services.

JODY

54:04 Okay.

ALEC

54:06 So, the job items refers to what parts labor items they're using on the job, most of our customers have some kind of template in the office, kind of what you guys typically do on the PM, but if they ever need to add any parts, labor items, if you want them to, they can do that too.

JODY

54:22 Those are the templates. Okay? All right. And they clock in and clock out from here as well.

ALEC

54:33 Right. And all this information will come back to you guys in real time unless they don't have signal, when they get signal, come back in real time.

JODY

54:41 What is the pre work authorization and the work acknowledgement?

ALEC

54:46 Yeah. Good question. So, some of our customers, they get sign offs before they do the work or after they do the work. I know you kinda mentioned like the customer experience. So, sometimes what our customers do to limit billing disputes and ensure you're getting paid is they might get the technician to get a work acknowledgement, have that customer sign off on that. And then when you send them an invoice on the back end service trade has some ways where they can see that. So, like, hey, my point of contact at the location signed off on this, I'm gonna pay this Bill because they signed off just a way to capitalize on that. Some customers use it. Some don't do you guys do sign offs now?

JODY

55:25 Yes.

ALEC

55:26 Yeah. So you'll be able to do that and I can walk you through that real quick if that's something important to you.

JODY

55:32 Do you have, do you have like an open work order? I guess this is going back to the office view. Do you have an open work order list of all the work orders that are open at the moment... work order status sheet or something like that?

ALEC

55:49 Yeah. How, how do you guys do that now?

JODY

55:53 Very poorly.

ALEC

55:54 Okay.

JODY

55:55 Yeah, we have a spreadsheet that we're keeping all of our open work orders because I mean, we can retrieve it from Computerease.

ALEC

56:07 But...

JODY

56:08 But it's difficult and it takes multiple reports. So we have a work order. We call it a work order list and that's where we track all the work orders on a spreadsheet.

JODY

56:19 Right now, we don't want to do it that way.

ALEC

56:24 Okay. And then, so it seems like you're talking more from the office perspective, not the technician per pet.

JODY

56:28 Correct. Right. Yes, yeah.

ALEC

56:31 Okay. I just want to be sure. So there's multiple ways you can do that. It's kinda just what works best for you. We have some job reports. So if you want to run a report on all the jobs that are in, you know, partially complete, you could do that. Also on the dispatch board at the top right? There, there was like an available job section. And I can show you that when we get back to the office if you want. Essentially if you click that available job section, you can filter by job type. So how many emergency calls do we have in the system that we haven't got to yet, you know, similar to that drag and drop I showed you earlier, you can drag and drop those jobs because, the idea is that, you know, one, it seems like you guys are already trying to do preventative maintenance as much as you can. So you're already on the right track, but obviously especially with how hot it's been this summer, people are gonna call in. So the idea with that is you can't always get to them right away. So you can always log a work order. It'll be in the available jobs. And then when you have time, you can drag and drop it from there. Does that make sense?

JODY

57:32 Yeah, yeah, yeah.

ALEC

57:34 Okay. And I can show you that back in the office if you want. I'm happy to show that. But really, the main way guys that we stand out from a lot of different platforms. Because as I'm sure you've realized I mean they all have different styles, different fields, but there's really typically only two to three things that make these platforms different from each other. One of the main ways we do is this efficiency loop to, so this is designed for the tech to report more repairs, get more pipeline to the office and then make it easier for the office to flip them to quotes. So I'm gonna kinda walk you through how that looks right now. So if I click this deficiency and click add deficiency, this is when I'm notating a repair. Now, we know that technicians typically don't like to do a whole bunch of writing or typing. So they can just put in a simple description of what they found on this deficiency. Cool thing is though is that a lot of our customers, they typically want to get two to five pictures. Reason being is that it really increases your chance of the quote getting approved. So for example, you know, if you find this deficiency and you send out a quote, if you have a couple of pictures on there, your chance of it getting approved is a lot higher.

ALEC

58:56 Then from here, we'll select the severity. So I'm gonna say this deficiency is inoperable. It's not functioning. I then can tie it to that exact piece of equipment. And then I can notate the status. Is this a new deficiency? Something I just found today that needs to get quoted out? That's what I'll notate it as today. And if I save that here, basically what that's gonna do is who's ever in the office that's responsible for sending out those quotes? They'll receive an e-mail notification, that e-mail notification. It's not just gonna say, hey service trade found a deficiency.

--- Wrap-up ---

ALEC

59:37 Go find it. It'll contain the exact link you guys need. So you guys can go ahead and send out the quote in real time instead of, you know, having to rely on phone

calls or stuff like that.

ALEC

59:52 Now, as far as your process now, is that something that's done through text and phone or are you guys waiting till the end of the week to kinda gather those when they turn in the work orders? Like how does that go now?

--- *Wrap-up ends* ---

JODY

1:00:02 We commit on the phone and then they send emails at the end of every day, kind of breaking down what was done. And then again, with the paper tickets, we'll wait till the end of the week. So it's currently in three different.

JODY

1:00:18 Yeah, we need, we have a need, to be quicker with that turnaround. And this might, you know, something like this could help. I would see.

ALEC

1:00:30 Yeah. And I, I'm assuming the quicker turnaround just because the quicker you send it out, the quicker you'll get a response is kind of what you're looking for. I'm assuming.

JODY

1:00:37 Well, well, where you get to ask for updates, you know, real time and, you know, if the guys on the next I'll send it, you know, with my daily e-mail I know I need it now.

JODY

1:00:47 I think a problem that we have is where we have technicians that are doing stuff out there and we don't have real time communication with them. Sometimes they'll they're doing their thing and we're scheduling them for tomorrow and the next day, but we may not know that they need to be back out where they are again tomorrow. And so then we skip a day and we come back in, you know, two days later and the customers down that period of time and we don't get a quote right away. Sometimes this would kinda seem like it would be more happen real time and, we could, it would be seamless, I guess or somewhat seamless.

ALEC

1:01:28 Right. And then, as well as when you scale instead of, you know, having to check three different things at the end of the day or whenever they're checking that it'll just be all in one database? Like do you guys think maybe you're missing opportunities just because they're all over the place as far as like, do you think maybe the, a centralized way to do it? You might be able to get more quotes out or at least have better. I'm sure you'd have better visibility. I mean, obviously just said that, but you think this maybe help you get more quotes out?

JODY

1:01:55 Get get more accurate information. You know, we get a, send an e-mail with no model and serial number, just saying compressor bad. So that starts a chain of phone calls and then it ultimately results in going back out to get more information, right? So it's maybe just to get the quotes up more quickly. Yeah, that would help you.

JODY

1:02:16 Speaking of which there is a quoting tool on here.

JODY

1:02:19 Yep.

ALEC

1:02:20 And that's exactly what I'm about to go through yep. And then I probably want. So in the interest of time, I probably won't show the work acknowledgement but just know you can get a sign off too. So if they want to get a sign off before it's pretty simple, you know, I'll actually just go through it real quick. For example, all I'll do is select the contact and then if I wanna review this with my customer... you can go through all these things, what files and photos, deficiencies, we found what we came here to do. And then Jody's name automatically populates. And then if Jody wants to sign off on this work... you can do that. And then if you want to send Jody a copy, you can do that as well. Pretty simple. But anyways, I'll show you what the quoting side looks like because that's definitely one of our more popular features. So when they're talking out, they'll be able to decide, hey, did I finish this service or did I not finish this service? I'm gonna say I finish this service. And then this is something relatively new. This is tasking. So if you want your technicians to be required to leave a picture or leave a comment or acknowledge that they try to identify efficiency, they can do that as well. So, for example, you can see here that I left a comment, a recorded efficiency, but I did not add a photo and I can attach a photo if I need to. But I'll go ahead and go back to the office to show you how this information travels. So give me one sec here, gentlemen. So I'll refresh this here. So all this information comes back in real time. So you can see any clock events I logged... any deficiencies in the status of those deficiencies, any comments? You can even see that work acknowledgment. I just got here. So if you wanted to attach that to a future invoice, you could do that here as well. But really the main entre of this is the deficiency. So like I said, if it gets attached to the work order, they'll come in real time, but you'll also see it via e-mail... so the way that works is it looks something like this, you're in control over who needs to receive it, who wants to receive it, stuff like that. So I can see what unit it's pertaining to what's the issue, who reported it and where, and then if I go ahead and click on this link in real time, it's already gonna take. Me to a page where I need to quote it out.

ALEC

1:05:21 So I might wanna look over this information. If it all looks good. I'll just simply click add to quote... and I'll click create quote.

ALEC

1:05:36 Now, if this is a relatively unique quote, you can always manually type it up from scratch. So if I needed to manually type in a description or parts labor items, I

absolutely could do that. But what a lot of our customers like to do is they like to apply these like quote templates. So, for example, if I have, you know, if we send out a lot of compressor replacement templates or quotes, I should say, you click on this little template, it'll populate the description, the items that you guys are typically using. The idea here is that this will get you about 90 percent of the way they're... all you might need to do is make some slide adjustments to prices or slide adjustments to the description.

ALEC

1:06:27 Now, before I send this out to you, are you guys quoting out a word e-mail like what do you guys kind of use now to quote?

JODY

1:06:35 We estimate using excel and we use word for proposals and we send that out via outlook... e-mail...

ALEC

1:06:49 Okay. And then if they approve it, are they just emailing you back? Like, hey, we're good to go or how are they? Like I?

JODY

1:06:55 Yeah, pretty much. Yeah.

ALEC

1:06:58 Is it ever hard to track? Like which one's been approved? Which one's not? Is that ever hard to track or?

JODY

1:07:06 It can be?

JODY

1:07:07 Yeah.

ALEC

1:07:09 Okay. Well, I'll go ahead and send you this one so you can see what your customer will see. So, Jody, I'm gonna send this to you via e-mail it's gonna be a quote from, or a service, which is our little fake company. You go to your e-mail and yeah, you can do it on your phone to work on there as well. Basically, I'll say review and respond a quote in the e-mail click that link and approve that quote. Assuming my price isn't bad, if, you know, let me know what your thoughts are good, bad or indifferent. But take your time and looking at that quote.

JODY

1:07:47 From a var service solutions, got your address, your number, quote number for target headquarters, which is me.



JODY

1:08:00 Compressor replacement for the hvac system, 768 bucks. Okay. I'm gonna go ahead and improve you.

ALEC

1:08:12 Okay.

JODY

1:08:15 Your purchase order number? All right, pop.

JODY

1:08:25 Nine nine nine nine.

JODY

1:08:34 All right.

JODY

1:08:41 So...

ALEC

1:08:42 So, yeah, if you, yeah, we can see here that you approved it, we don't have to Chase down that po. And the cool thing, is if I click this history button, they'll help you see the life cycle of the.

JODY

1:08:56 Quote?

JODY

1:09:02 Cool. And how do we Bill it?

ALEC

1:09:06 Yeah, I can go through that before I go through that though. Do you think this would help you guys get some more quotes approved or?

JODY

1:09:15 More, I mean, it'll just help us see it easier. I think... maybe we can get, maybe we get more done this way? Yeah.

ALEC

1:09:28 Okay. Yeah, because a lot of our customers have found, that they are customers like that just approved button because it's easy for them to use as far as billing. I'll go ahead and get into that. So let's say, I'm ready to Bill out... this work

order that I, you know, had for us today. All I simply do is click complete job and complete job and create invoice. Now, what this is gonna do is it's kind of a checks and balances. So someone in the office might look over the work order for passing on the billing. So before they do that, they might want to see, you know, make sure all these costs are correct, make sure everything looks good, assuming it is, I'll just go ahead and create this invoice.

ALEC

1:10:22 Pretty similar feel to the quotes. You can go in here, change the format. So if I wanna do grand total or something along those lines, I can do that. I can add change items, stuff like that.

ALEC

1:10:40 Then to send that out to the customer.

JODY

1:10:44 So we have to manually enter... the... material items in there.

ALEC

1:10:52 No.

JODY

1:10:53 So...

ALEC

1:10:54 All these items are from that work order. If by chance any of that information was inaccurate or I needed to add information, I could, but the idea is that you might make some slide edits, but you won't have to be right?

JODY

1:11:08 This up from scratch.

ALEC

1:11:12 Like let me.

JODY

1:11:13 Show you real quick.

ALEC

1:11:15 So, those parts labor items, you guys.

JODY

1:11:19 You issue purchase orders for materials in here. And so right now, we're issuing POS for materials using Computerease. And so when it calculates margin like on a demand service call... see, it calculates gross margin. But in order for it to calculate margin properly, we're gonna need not only our number of man hours and, the rate of the technician, but we're also gonna need the cost of the materials that we're purchasing. I'm just curious how that gets entered into here.

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JODY

1:12:00 In order for us, to get the right gross margin in each work order or will it work it with Computerease? To, to pull costs out of Computerease, or will this just push payroll into Computerease? I mean, what, how are we going to get cost, real cost data all the time using this program?

ALEC

1:12:28 Yeah. Good questions. So I'm gonna kinda tackle those one by one because it's definitely a lot there. So your first question as far as POS in service trade. So in core service trade, you can't cut a po. So you could either keep cutting POS in Computerease and just put it in there or some of our customers use the job number. If you'd prefer to do that as far as these parts labor items, when you onboard with service trade, you'll put in your parts, labor items with your cost stuff like that in a reactive service call. If you're adding a part that maybe it's not in your system, you can do that. But for example, if I wanted to.

JODY

1:13:11 Well, prices are changing so quickly refrigerant costs. And so we're not really going to have, I don't see us having a lot of inventory pricing and this thing, the costs are pretty much what they are the day of in service. Yeah. And so I don't see us using a whole lot of the inventory pricing here unless we buy a pallet of refrigerant, then we'll have it at whatever that pallet cost was divided by, you know, pounds at that time. But once we're through that pilot, we're subject to the market again. So we're not going to have a lot of inventory pricing. I don't see the need for that.

JODY

1:13:55 Yeah. We won't carry inventory outside of, I mean, we need it, we go buy it.

JODY

1:14:01 Yeah.

ALEC

1:14:02 Wasn't I wasn't referring to like I'm just referring the cost like in our lot of our customers, I have the same thing. So for example, this refrigerant actually cost 125 today. You can always change it if for whatever reason you'd rather just always put it in the day of, you can definitely do that too. And then if, for example, if I wanted to put in a purchase order, like I said, ServiceTrade core can't cut POS, so you can put in the purchase order number from Computerease, or use the job number if you wanted to, you can put in where you got it. So if you got it from home depot or lowes,

you could do that... and then you can put in the status. So have you received it yet? Have you ordered it yet? Stuff like that? And then you can put it in a delivery?

JODY

1:14:50 Date or stuff like that.

ALEC

1:14:52 So that, that's that, is there any questions on that specific before I get into like Computerease?

JODY

1:14:58 No, it's okay. Go ahead.

ALEC

1:15:00 Okay. So as far as computer is, so depending on your budget. So let's say about 30 percent, 30 to 40 percent actually of our customers don't integrate with their accounting system or whatever reason. As far as our computers integration, we're one of the only vendors to my knowledge that offers it however most.

JODY

1:15:22 People that...

ALEC

1:15:22 Get it. It's when they're around 14 tax kinda getting up there... as far as the integration basically not to get too fancy or overwhelm you here. But essentially, Computerease has a closed API which is just a fancy way of saying it's not the easiest software to interact.

JODY

1:15:42 To it. So we do have the.

ALEC

1:15:44 Ability of, you know, pushing outstanding invoices from service trade to Computerease for financials. But the concept is that service trade is gonna manage your workflow from the moment you dispatch a job all the way up to the invoice. You're just simply using Computerease for your financials and accounting. And some of our customers are doing it the way you guys are doing it. Now, they'll get service trade to get it from the dispatch to the invoice. Because we'll help you send out that invoice quicker, get paid quicker, and then just manually double data, enter that in the computer. Is we do have some customers that do take advantage of our integration, but typically they're either growing into that or they're a bigger organization because it does cost money, but depending on your budget, that's definitely something we could explore as well. And we actually have customers that are live with it.

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ALEC

1:16:38 So if there's other vendors that are telling you that they have a Computerease integration, I'd be a little careful of that, maybe ask for a reference because I haven't really heard of too many other vendors that have that. But does that kinda answer your questions there? And then you kinda asked a couple of different questions... just wanna make sure I was answering all those.

JODY

1:16:58 Yeah, I'm just, I think what I'm a little skeptical of is that computer, I mean... service trade is gonna give us margin information, but if it's not keeping up with the actual material purchasing... then the margin data won't be accurate. And I mean the labor would, if we enter the labor rates, correct? In service trade, I assume we enter the technicians labor rate and as well as our allocated burden rate. I'm assuming we enter that as well somewhere. But... the only way it's gonna track margin data is if we're inputting the actual costs as we purchase them... versus what's being entered by ap in Computerease, right? So if we want that in here, there's going to be a double entry to put that unless we integrate... correct?

ALEC

1:18:02 The capacity to do that. It's just more of and I can talk about that at the end at a high level. I mean, how are you guys trying to do that now? How does that kinda go now?

JODY

1:18:15 Right. Well, right now, it's not going very well. We're trying to, there's some configuration problems we have with Computerease that we're scheduled to work through next week, I think, but it's not going well, at the Computerease level right now. So we're hoping to fix that next week, but okay, that's I think I get it. Okay.

ALEC

1:18:41 Just to kinda ease your concerns about this gross margin real quick, I mean, if you guys wanna do it that way, like I said, you can put a general range reset if you want. If you don't have to do that, but this margin is going to be accurate.

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ALEC

1:18:56 Assuming you have the right pricing contract associated with it. Assuming you put in the right cost, and regardless of what system you buy or go with, that's gonna be the case, you know, you're gonna have to make sure who's ever putting this information in is putting thing it incorrectly. But assuming that they're putting it incorrectly, the margin is gonna update like this margin right there got calculated because I just, I didn't really look over this too much and I just went straight to the invoice. But if I wanted to look it over more carefully when I clicked complete job and create invoice, before I even created the invoice, it put me to a screen where I could look over the cost to make sure all that was correct before I even got to that point. But yeah, no, you go.

JODY

1:19:44 When we enter technicians into this, will we give them information like the, what we pay them? No?

ALEC

1:19:54 Unless you want to, but most of our customers don't wanna do that. So they're not gonna see who gets paid. What stuff like that?

JODY

1:20:03 Yeah.

ALEC

1:20:04 Assuming you don't want to?

JODY

1:20:06 No, we don't want them to see?

JODY

1:20:09 We wanted to be able to calculate the labor margin. So, we may charge 100 dollars an hour, but not all the tech, make the same rate. So... some will make more, some will make less depending on their rate. And we need to accurately capture that.

ALEC

1:20:29 Yep. So one way you can do that is each technician can have a labor rate. So this is H vac labor one hour. If you wanted to have Alec technician labor rate with associated costs with Alex, you could do that. There's all kinds of ways you can do this. So you can have Alex labor, you can have overtime labor, holiday labor. These are all things you can get in the system with cost. And then if you ever need to adjust them like this one didn't seem to be updated. So, you know, I can always put in 30 if it's 40 today, whatever. I can always change.

JODY

1:21:03 Change that. Okay, I'll follow you.

JODY

1:21:05 It seems like we, it would be good for tracking maintenance contract performance, but how do we do it? Because we have some contracts where, you know, the typical contract has three quarterlies and one annual.

ALEC

1:21:22 So four.

JODY

1:21:22 Visits a year. Most contracts require multiple days to complete the work, but we'll go out four times a year for the three quarterlies in the one annual. And right now, the way we're doing it is every time we go out, we open up a new work order. And so if we're looking at what the annual cost was, we would have to pull in multiple work orders. And right now, it's fucking impossible to track because it's just, I don't know. I don't have to do a forensics investigation for about three hours to try to figure out one, you know, one contract on what it was for a 12 month period through Computerease. But can we track it in? And how would you do that on a job that takes, you know, let's say it takes two texts... you know, eight days, and if we have that in multiple work orders, how do you track? How do you track that, the performance of that one contract, in terms of multiple work orders, or do you use one work order? Because the other thing too in Computerease for billing purposes, if we open up a work order, whether it's a PM or a demand service call, in order to Bill it, we have to close that work order. And so then we Bill it. And but then, you know, if we're working on the same contract, we have to open up another work order, you know, to build something else, we can't leave, we can't do a partial billing on a work order and Computerease and continue to Bill on that same work order. So how do you do that in service trade for a contract?

ALEC

1:23:05 Yeah, yeah, good.

JODY

1:23:07 Where...

JODY

1:23:07 You where you want to track costs but you're gonna be out there multiple times throughout the year, but I want to be able to look at it for either the quarter or half the year or the full year. If we're looking at the full 12 months, all four visits. How do you do that?

ALEC

1:23:23 Yeah, yeah, that's a good question. Now, one thing I do wanna say a lot of you're asking a lot of the right questions, like a lot of these things are going to be really good for scale abilities and stuff like that. I don't want you guys to get away from though the like lift that service trade is gonna give you from a technician productivity standpoint, managing the PMS, a lot of this advanced stuff we can do. But I also wanna make sure we're understanding that there's already a lot of ROI and really that's regardless of what platform you go with, if you go from what you're doing now to something else. I know you mentioned something that you're looking at, you're. Probably gonna see some kind of lift, you know, whether that's delayed billing or the deficiency tracking, stuff like that. But just to give you an idea on how you could potentially track that in service trade. So like I showed you in the beginning here, this is a contract. All a contract in service trade is a markup rule that you can associate with a work. Now in service trade, you can do phase billing. So if you have a PM that took you four days and you wanna Bill for each day, you can Bill each day. And as far as how the margin is being or how you're performing is being calculated. All that really needs to happen is the invoice needs to be associated with this contract. So, for example, this invoice is associated with this target contract and it's going into here. So assuming you're associating it with the right contract,

which when you set these PMS up on these services, you are gonna set them up correctly, or if you have break fix in the contract as well.

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ALEC

1:25:11 I mean that's something you can do, but you'll be able to see your revenue and stuff along those lines right here. So like for example, the, our expected was 35 and our actual 50?

JODY

1:25:24 I know how to do it. We can set up. We can set up its own job number. We need to set up a job number in Computerease... for...

JODY

1:25:35 The year.

JODY

1:25:36 And then every time we do a work order, we charge it to the same job number, yes, for the year.

JODY

1:25:41 We can do it for the year at the like a Construction.

JODY

1:25:43 Almost, yeah. Yeah. Except we won't have all the different cost codes. We're just gonna have labor and material base, yeah.

JODY

1:25:53 They get their own and.

JODY

1:25:54 So, then it would, that would be associated with the, a contract in service trade. Yeah, the job number, would be associated with.

JODY

1:26:04 Yeah. Okay.

ALEC

1:26:06 Yeah. And, and for those more advanced financials, like service trade is not an ERP, although we can give you like high level information. And like I said, I mean, there's all kinds of ways you can grow a service trade. I just don't want to sell you something you don't need right now.



JODY

1:26:21 I think it's okay.

ALEC

1:26:24 Okay. Gotcha. So to just show you real quick how an invoice looks in service trade. So essentially our invoices were designed. We know the person you're billing isn't always the person you work with on site. So, for example, if they've been a long time customer and they wanna pay, they can pay right then and there with AC, H or credit card... as far as if by chance they need a little bit more visibility, they can click on this service link. This is a post job report. You can send this before the job after the job gets attached to the invoice. This basically gives the customer visibility on what you guys did, who did it, stuff like that very permission base. So whatever you want them to see, you can see. And then as far as how this information gets into Computerease. Like I said, we do have an integration. I don't know, I mean, if you can, you know, if it's in the budget, then, you know, maybe I'd recommend it. But like I said, about 30 to 40 percent of our customers don't have an integration. So you just simply take this information from here and put it into Computerease. Like you're doing right now or if you wanted to explore the integration, I'm not the expert on that. I know a little bit about it, but I'm not by any means an accountant that's something that we offer as well. So that's kind of a work. Basically, it's basically service straight. I mean, any questions on that?

JODY

1:28:00 No, I think we'll...

JODY

1:28:01 Let you get to your, preparing for your weekend. I know we've kept you for an hour and a half now, but I...

JODY

1:28:09 Probably still.

JODY

1:28:10 Have a few more questions about, I guess price is going to be the next one cost. What does this thing cost us?

ALEC

1:28:19 Okay.

JODY

1:28:20 Maybe, is it some cost information and we'll kick the tires here and we'll maybe I think we might need have some more questions but we're not going to hit you with those today.

ALEC

1:28:31 It's fine. Yeah. I know we've talked about a lot. I'm sure you're gonna, you know, think internally, and I know you've taken a look at quite a few others as far as the ones you've looked at. Where does service trade? I know it's kinda first impression you just saw for the first time, but where does service trade kinda fit in the mix out of all the ones you've looked at?

JODY

1:28:51 I think it's comparable to, we just looked at BuildOps, seems to be comparable to that one, yeah, similar.

ALEC

1:29:03 Yep. Yeah, because BuildOps, they're you know, kinda in the similar space that we are. So we definitely run into them from time to time. You know, they're pretty good at what they do. I mean, they're you know, out of silicon valley have a lot of access to funding. The only thing I would say is that if you do ever move forward with BuildOps, I would recommend talking with the reference that's live. Only reason I say that is we have had customers that have left service trade for whatever reason went to BuildOps. They didn't have the best onboarding experience and then they went back to us but they do have, you know, pretty good technology and I know also to, they kinda started off in the electrical project space as well. But essentially, as far as pricing is concerned, I can kinda walkthrough that. So basically these are our, you know, three tiers of plans, right? So we have the select, the premium and the enterprise. I probably recommend the premium plan for you although I think the select plan could work for you. The reason I'm kinda leaning on the premium plan is what you're gonna want is you're gonna want the support for multiple contract price list. You'll be able to put those together and make sure the markup rules are correct as well as you're probably gonna want support for custom integrations, because even if you don't go with the Computerease integration upfront, you might want to explore in the future, there's a lot of other things that come with this as well. But as far as the integration, is that like must have or is that like nice to have? Like where is that? Because I can give you an idea of what it costs with or without. But just wanna make sure I have an idea on where that is in the priority list?

JODY

1:30:51 Eventually it will be. But right now, we... I mean we want to crawl before we walk.

ALEC

1:30:59 Okay. Yeah. That's what I'd recommend that's totally fine. But just know it's available for it and I can send you some information on that as well. So just give me one second. I just gotta put this together on my Salesforce on the other screen here. I don't know if you guys use that or not. But while I'm putting this together, was there any favorite parts of the demo today? Or any parts of the demos you guys liked?

JODY

1:31:24 Is a little convoluted it. It seemed like it, it's got some really good features but I'm not sure that.

JODY

1:31:40 Our questions are going to get fully answered here today.

ALEC

1:31:43 Okay.

JODY

1:31:44 But it looks fairly intuitive. I mean, everybody has a plan until they get punched in the mouth. You know, we've had lots of software implementations that have gone wrong in the past here. And so we're always skeptical, of any new product, but... yeah, it looks.

JODY

1:32:08 It looks like it's good for the like the field user face looks good. The app. I think we're just wanna make sure that the office and the field get what they need out of this.

ALEC

1:32:22 Okay. Is there anything specifically you're concerned about not going from the office to the field or vice versa?

JODY

1:32:29 From the office, I think we, we're wanting to drill down into the nitty gritty.

ALEC

1:32:35 Okay.

JODY

1:32:36 Well, what?

ALEC

1:32:37 Well...

JODY

1:32:38 What...

ALEC

1:32:38 We can do, I can give you a price real quick just so you have an idea on how much this costs and we can set up a second demo and then maybe I can call one of you guys before to make sure I'm prepared and we can really get deeper into the office side if you want. Because I know we kinda went through a lot today, but I do wanna make sure you're comfortable with that because obviously, you guys are the ones that are going to be using that as well as I know you mentioned and, I know, I totally get it man. You know, I know there's a lot of Cammy software companies out there. So I can understand the concern. I'm always happy to set you guys up to if a

customer reference, if you know, that's kinda the last thing outstanding. Like you just wanna talk to someone that uses the software, has similar business structure to you guys. I'm always more than happy to set that up. That is something though if we set it up, it's kind of like the last step before making a decision just because we're trying to be respectful of our customers time.

JODY

1:33:37 Do you have any, do you have any customers in Houston that are mechanical clients in Houston using it?

ALEC

1:33:43 Yeah, we do is kilgore in Houston. You guys familiar with kilgore?

JODY

1:33:48 They are, yeah.

ALEC

1:33:50 Yeah, they're one of our long time customers. We actually have someone that works here that used to work at kilbore? Okay. Yeah, she actually, her name's Diane, she use all of our customers that are on like Quickbooks. So she used to be an accountant. We needed more help with the accounting side. We hired her.

JODY

1:34:09 About three years ago.

ALEC

1:34:11 Cool. But yeah, I'm sorry, this is taking me a little long. Guys. Let me just pull this over here like computer had a software update. So it doesn't work the way that used to. So let me just, yeah, it's just being weird. This is, you know, I'll obviously make this a little neater for you guys, but this is what you'd be basically looking at.

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ALEC

1:34:35 So here at service trade, we Bill annual, we charge per technician. So we don't charge for any office users. The reason we do that is we consider, you know, the technicians, the one making money out in the field. So we wanna charge based on your revenue generating assets.

JODY

1:34:52 What are the, what's involved in the data migration? What are you migrating?

ALEC

1:34:58 Yep. So if you have any data and spreadsheets and computers, anything like that you'd want to come over to service trade, essentially, you'll have an

implementation specialists. Their job is to train your team. Their job is to set up your account, have a weekly call with you to make sure your projects going on schedule. And basically that's done. Usually, it takes people about 60 to 90 days to go live with service trade. On average, it's about 82 days. So that's kind of what that's referring to and that's really designed to set you up for success.

JODY

1:35:36 Okay. I'm still not sure what we're migrating with all of our customer sites, addresses, contact equipment that we do have listed. Okay. Got it.

ALEC

1:35:51 Yep. All that stuff. And then I also account set up to is an outline items that refers to, you know, the time you'll spend with that account manager to, or not account manager, but the implementation specialist to set up the account stuff like that?

JODY

1:36:06 Okay. Got it. All right. Well, thank you Alec. I think we've I think we got a little bit to consider here, but we'll let you go for today and we'll possibly want maybe another demo on the little deeper drill down on the office side a little later.

ALEC

1:36:32 Okay. That sounds good. And then for you guys, are you, when are you guys looking to either implement a solution or go live with the solution or make a decision? Do you have any kind of timelines by chance?

JODY

1:36:44 Yeah, we wanna go hot on January one.

ALEC

1:36:48 Okay.

JODY

1:36:50 Yeah. So, this is an anticipation of that. So we're kinda into the last quarter here. You know, we wanna start keying that up... for.

ALEC

1:37:09 Okay. That makes sense. Just to let you know though, just like, you know, you're like a lot of other contractors. We also had a ton of contractors that wanted to go live January first. Right now, the earliest we could get you live is January fifteenth. Now, it's a 90 day window. Like I said, sometimes you have customers go live on 60 days. Sometimes it takes 90 on average 82. So, for example, if you made a decision this month, you'd probably be looking at either going live January fifteenth or February first, just so, you know, don't want to rush you by any means. I wanna make sure you're you know, vetting these things out, but we've had just a lot of folks that had the same goals you. So they kinda took those slots.

JODY

1:37:56 Okay. Think one month plus or minus is gonna kill us.

ALEC

1:38:03 Yeah, that's what I figured just thought I'd let you know, and then that follow up demo. Would you wanna just commit to a time now or do you guys wanna talk to internally first before setting that up or?

JODY

1:38:15 Let us, let us reach back out to you first. We'll we'll set something up. Maybe next week we'll call you back and tee up something.

ALEC

1:38:24 Okay. The only reason I ask is I will be out. I got a medical thing I have to attend to from the thirteenth from the fifteenth. So definitely send me an e-mail or give me a call. I'll get back to you when I can, but is there any way Jody I could maybe just set a tentative time to call you? Either? I don't know if Monday?

JODY

1:38:44 But let's just set up another two weeks from now. If you're going to be out Friday. Okay. Let's do next Friday, same time, one o'clock...

ALEC

1:38:52 Sounds good. I'll just do that. Then that sounds good.

JODY

1:38:55 Yeah, perfect. Okay.

ALEC

1:38:56 All right. I'll send you guys a recap e-mail on Monday with a lot of information. If you need anything for me, my information will be in the flutter.

JODY

1:39:04 We'll we'll give you some, a few more questions that we want to look at specifically next time. Okay? We'll...

ALEC

1:39:12 Good.

JODY

1:39:14 Okay. Thank you.

ALEC

1:39:15 Thanks, guys. Appreciate your time.

JODY

1:39:17 You too.

ALEC

1:39:19 Bye be.

*The End*