

# ServiceTrade Demo with West State Mechanical Inc

Brett Griffith Recorded on 10/17/22 via Zoom, 29 min.

# **Participants**

**SERVICETRADE** 

Brett Griffith
Territory Manager

Mike Thomas SDR

WEST STATE MECHANICAL

Kevin Kilduff

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# **Transcript**

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

--- Purchase decision ---**BRETT** o:oo Going on, Mike? **MIKE** 0:01 It's a, Brett, I'm happy to. **BRETT** 0:03 How about you? I'm all... **MIKE** 0:04 Right. I'm happy to sit in for a minute. I've always seen that option on Gong, you know, what your demos going off? And I was, I got, I don't know how this thing works like, I wasn't sure if it puts you in. Are you, you're just able to spectator? --- Purchase decision ends ---**BRETT** 0:15 Did it? So you clicked on it from Gong and got, right. **MIKE** 0:18 No, I actually just click the Zoom link in the calendar. **BRETT** 0:22 Okay. I've always been curious about that, but yeah, I've never wanted to jump into someone's meeting accidentally. **MIKE** 0:27 Exactly, exactly. **BRETT** 

o:30 Yeah. So, for this one, I don't know, because like all the context you gave me, I'm happy to do a full demo forum, but I think he really just wants to talk about pricing, right?

#### **MIKE**

o:41 Yeah. So I call them and talk to him and he was like, listen, you know, we're evaluating a bunch of other softwares right now. So, you know, we're you know, interested in really just knowing how much it's gonna cost. And I told them I said we'll look, Brett the perfect guy to talk to about that, and I figured I'd let you negotiate what you want it to show him or navigate with what you want it to show him... you know, because he's use service trade.

--- Purchase decision ends ---

#### **MIKE**

But like you were saying, he's used it as a tech and out as an office guy. So, you know, you could be more specific with that stuff and I told them that, you know, you're the guy to talk to about that in, you know, we look forward to seeing, right?

--- Purchase decision ---

#### **BRETT**

Works, I'll kind of open the floor to him, be like, realistically, what do you need to say? It sounds like pretty straight shooter. I've talked to him a couple of times you've talked to him bunch before. So I don't wanna like, I don't want to jump into a demo and have it be like this is a waste of my time for one. It's not a waste of time, but.

--- Purchase decision ends ---

**MIKE** 

1:37 Yeah.

**BRETT** 

1:38 He knows the product.

## **MIKE**

1:39 Yeah, yeah. I didn't know if you were just going to be like, hey, listen, I, you know, I know you use it as a technician, you know, I don't know if you want me to just walkthrough what it looks like on the office side, you know, in terms of that or, you know, whatever he wants to do.

#### **BRETT**

Yeah, that's exactly what I'm gonna throw out. I'm gonna kinda let him guide me... because...

1:59 We had a pretty good connection on the call today. So, you know, I expect him to show. I kinda tried to relate to them. I was like, you know, I was hoping to catch you in the office early today since it's kinda crappy rain and out. And he was like a, it is a little bit. Where are you? And I said I'm in wallingford and he was like, it's only like 20 Miles away. So, okay.
BRETT
2:19 Cool.
MIKE
2:19 Try to make a little connection to make them feel, you know, like he's got.
BRETT
2:25 Yeah, exactly. We just finished getting set up.
MIKE
2:29 Here.
MIKE
<sup>2:35</sup> And then when I hung up, I was like, man, I wonder if he was thinking when I said hop on the call. I was wondering if I should have been more specific about the Zoom meeting. So if he doesn't show within, you know, a couple of minutes, I can call him and make sure he's clicking the link instead of waiting for us to call him on the phone.
BRETT
$_{\rm 2:53}$ Okay. And if, when you call him, if he only, it's time for a phone call, you can just add me to that.
MIKE
2:58 Okay.
BRETT
3:04 Yeah. It's a lot of times these like, so is this paper companies? They're just not organized? They don't look at their calendar like most companies do. So outside of the do, forget about these meetings.
MIKE
3:17 <b>Yeah.</b>
BRETT
2:24 I've been up since two o'clock this morning.

MIKE

3:27 We have so wait for our up so early for. **BRETT** 3:30 I was in New York, husband, jersey and New York this weekend. I believe on the. **MIKE** 3:34 Morning, I got you. Yeah, I heard you talking to Lucas about betting on the free sites or whatever. So, yeah. Would you go watch a game or something? **BRETT** 3:43 Yeah. I did. I went down to sit down in atlantic city. There's it looks, she knows my sister and my brother in law. We went to the caesar sports book and AC and just add as a Booth all day and bet on every game imaginable. **MIKE** 3:59 Linux cities like mini vegas now. **BRETT** 4:02 Kind of it's a lot more spread out AC used to be better. I grew up in jersey, so I went there good amount. I don't know it's pretty. **MIKE** 4:10 Crappy. Yeah, I just met with the sports betting lot wise. **BRETT** 4:16 Yeah, jersey goes, not sort of that they make so much money off of it too. I don't know why every state doesn't make it legal. --- *Pricing* ---**MIKE** 4:22 I know, man, it's wild. Yeah... because even, you know, even if they win there or even if they could even, you know, that they're always making money. **BRETT** 4:34 Yeah, I know because, yeah, you make a... **MIKE** 4:36 It's your big... **BRETT** 

4:37 Money line that you spend 11 dollars, you went 10 dollars if you went to the extent that we get the cut.

--- Pricing ends ---

#### **MIKE**

 $_{4:44}$  Good money. Should I just call this guy to check in? Because I, you know, I think I have a feeling he's expecting a phone call?

#### **BRETT**

4:54 Yeah. Give him a shout and if he can only do a phone call just, I mean, to the call, you can add my Zoom number or my cell phone, whatever is easiest for.

#### **MIKE**

<sup>5:02</sup> Yeah. Alright. I'll probably it'll probably be your Zoom because I can just type in Brett. Okay. Alright. Let me give him a call real quick and then I'll jump back in here. Cool.

#### **MIKE**

7:47 He's joining right now. Perfect. I'll have to resend them the email.

**BRETT** 

7:52 Good.

**MIKE** 

7:57 Make sure I gotta write camera. Okay? I'm in the office.

# **BRETT**

8:01 Yeah. I love that picture of that. Megan is just like Brett them, find the right.

**BRETT** 

8:11 See.

**BRETT** 

8:16 Yeah.

#### **BRETT**

8:24 Hard for me to give them pricing because I don't know what he needs. It's going to be select or premium, but that's what I'm Peter in right now.

**BRETT** 

8:39 **Areas...** 

# **BRETT**

8:56 Hey, good afternoon, Kevin. Can you hear me?

9:50 We only have 11 technician. So we're not a huge company. You know what I mean? We don't for 7,500 guys on the road.

**BRETT** 

10:00 Understandable. And then as far as like what you guys are coming off today, it sounds like everything's pretty much paper today.

*--- Type of work ---*

**KEVIN** 

10:07 Yeah.

#### **BRETT**

10:08 Okay. So you said Kevin, you're looking at a bunch of other softwares. What else are you looking at?

#### **KEVIN**

10:15 I mean, that's irrelevant rarely, but they're all just the same type of systems, you know?

#### **BRETT**

<sup>10:22</sup> Yeah, I guess the reason I asked that question is service trade definitely catered towards commercial mechanical contractors. You guys aren't doing any residential or anything like that or are you?

#### **KEVIN**

<sup>10:30</sup> Well, we do a little bit of it. We also do plumbing, you know, so we do HB AC, service install and plumbing service, install anything from large piping work too. We fix toilets since bugs and sales and gotcha. So there's no kind of dispatching. We need an easy to use program for everybody.

--- Paper process ---

#### KEVIN

10:53 Easy access is going to be able to get him, get out, you know... paperwork, time, cards, purchase orders, you know, shit like just basic.

# **BRETT**

Gotcha. Have you guys do post today? Is it just like paper notebook? Yeah. And then I guess biggest question for you is what are you guys looking to spend on software? Do you have a budget? You just compare numbers? Well?

--- Purchase decision ---

#### KEVIN

I mean, some of them are not even comparable when you think about it. I mean everyone's got a different price point for what they offer. We're just trying to figure out a price point that works for us for what we need.

BRETT

11:31 Gotcha.

# **KEVIN**

11:32 Do I have a budget number? No, not necessarily.

--- *Pricing* ---

#### **BRETT**

<sup>11:36</sup> Okay. So basically, what I'm thinking is let me just pull this up on the screen and let's talk through it.

#### **KEVIN**

<sup>11:42</sup> I know some of them go up to like 150 dollars a technician on months. You know what I mean?

#### BRETT

<sup>11:47</sup> Yeah. So realistically, based on everything you just told me now and what Mike told me from your conversations in the past, this is what I was going to recommend to you after our demo today.

--- Accounting integrations ---

#### BRETT

<sup>11:57</sup> And the reason is it's what a lot of companies jump on when they're joining from are going from paper to software. It's a really good starting point in the software world. You know, what service trade does? Having been a tech, but this will give you pretty much everything basic core service trade. It'll give you the Quickbooks integration. You'll get support along with it. But it is really good for companies that are coming off paper, moving onto software for the first time.

#### **KEVIN**

12:23 I guess my question would be, is what's the point in doing it for five technicians, if we have more than five technicians?

--- *Pricing* ---

#### BRETT

12:29 Yeah, great question. So this is per technician, what this is saying is we don't work with companies smaller than five tech.

**KEVIN** 

12:37 Okay.

# **BRETT**

12:39 So basically how it would work is 89 per month per tack. So I would do 89 dollars times 12 months. That would give me 10 68 for the year. And then if I did 10 68 times 11 tax, you'd be looking at about 11 eight for the year. And then in your first year, you'd have about a 3,500 dollar setup fee that is a one time fee. And it's essentially let's get all your data spread across all paper in Quickbooks, all that information.

--- Pricing ends ---

#### **BRETT**

13:07 Let's take that and put all your information and service trade as well as train you even though, you know, as well as all your guys how to use the program.

#### **KEVIN**

13:16 So, regardless of anything that happens, we're looking at 15 grand for the first year.

#### BRETT

13:20 Yep.

# **KEVIN**

<sup>13:25</sup> Alright. Now, if I wanted to try a demo, how would that operate? What I'd be able to select like what I, on my computer, get the platform and be able to have one technician try it?

#### BRETT

13:39 So we don't really do anything like that kind of how it works at service trade is, Mike those, his job, he calls you, sets you up with me and I would take you through like customized tour of the platform on my computer. We don't do any kind of like trial or anything like that. And the reason for that is there's so much work that goes into setting up these accounts on the back end. It's really just not feasible for us to do that because if you're gonna use it, we want your information to be in there. Not a blank slate of service trade.

# --- Accounting integrations ---

# **KEVIN**

<sup>14:08</sup> All right. I guess my next question would be as far as integration goes, how do you go about doing integration? We hand you a bunch of paper shit that we normally use. You guys figure it out from there. Do you come into the office and go through? We go through like I have an excel spreadsheets with phone books, all our customers, and then residential commercial, you know, like how is that integration going to happen? How long does it take?

# --- Accounting ---

#### **BRETT**

 $_{14:34}$  So, when you say integration, you mean like the implementation onboarding up the product?

# **KEVIN**

#### BRETT

14:39 Gotcha. Yeah. So with you guys, everything's on paper. It's an excel honestly, that's great because when we do onboarding, we asked for a CSV or excel files with all your data. And essentially the data I need from you is going to be your customers, your locations for commercial contract or customers items prices. If there's any kind of PDF checklist that you guys fill out contacts, like you said phone books, give that to us in a CSV or excel file and we will clean it up and essentially import everything into service, trade on that. We have a concept of a service delivery window.

--- Implementation and ongoing support ---

#### **BRETT**

15:14 Essentially what that means is that the earliest we can get started on implementing your account, earliest start date we have available as of today is 10 15 or 1,115. Excuse me. So November fifteenth and you would have a 90 day implementation window from there. So within 1,115 start date, you could expect to go live about February fifteenth or a little sooner.

#### **KEVIN**

15:38 Okay. Our time frame probably trying to get started with even the implementation process would be in November. So that's going to push us back to like March or whatever.

#### **BRETT**

<sup>15:52</sup> Yeah. And these windows for us, they pushed back 15 days at a time. We've got X amount of slots at a given date.

--- *Pricing* ---

# **BRETT**

15:58 Right now. It's 1,115. It'll go to 12 one. It'll go to 1,215 and so on. So it's kinda like what's available when you guys are ready to move?

**KEVIN** 

16:08 Right.

# **KEVIN**

16:14 Now, upon implementation, is there like a team that's gonna come in and... train me on the inside... our?

--- Pricing ends ---

#### **BRETT**

16:26 That, that is something we can do and I think it'll be helpful if I take you through this. Let me just to kind of explain what onboarding looks like. So basically

Kevin, how it would work is if we go through this process and you and your company telling me that, hey, yeah, this is something we want to do.

--- Implementation and ongoing support ---

#### **BRETT**

16:43 Essentially, I would hand you off to a project manager at my company who's going to be the one supporting you during implementation. With that project manager. You would schedule a kickoff call, essentially kickoff calls where we're going to really discuss your guy's data. We would schedule a time for weekly calls. Essentially, I need like 45 minutes to an hour of your time weekly for implementation or whoever the project lead is basically the person who's giving us the data. But plan of time for those certifications. Let's review your time line if you tell me as I need to be live in two months. Well, you have a 90 day window but my team can move as fast as you guys can move. So if you set the expectation, we can do it as long as you get us the data... but that's that big step. So looking for your customers, your locations, your services, whether they're recurring or there one time items and prices, do you guys track equipment today?

--- Paper process ---

#### **KEVIN**

17:37 We, we try to attract tools and shit. It's difficult but we dry.

#### **BRETT**

<sup>17:42</sup> Okay. Yeah. I hear that a lot especially on paper. There's really no where to put it. I'm not sure if you remember from your days using service trade, but tracking equipment tends to be pretty easy with what we gave you.

--- Forms ---

#### **BRETT**

<sup>17:54</sup> And if you want a refresher, I can totally give you that... and then PDF forms. If you guys are doing, you know, any kind of PMS onsite that you need to fill out for the customer, maybe it's a startup checklist, whatever it might be. If you have that, give it to us.

--- Implementation and ongoing support ---

#### **BRETT**

If you don't skip it. And to answer your question, you said, are we coming on site or we come in remote, we can do either for us to come on site for you guys. It would cost more money. We do it remote for most customers but totally kind of up to you guys what you want. But from there, it would be the certifications. You know, you already know what you're doing and at least on the technician side, so it would be more teaching you the admin side of service trade. We're gonna give every person in your organization certification program. Essentially, it's a self paced module based course with the test at the end tests at the end. Just what's my project manager know where you guys are tracking, where they're struggling. From there, we're going to

have these Q and a session with either you or your guys, whoever struggling and really focus on those things because something sometimes, you know, certifications don't work personally. I need to be talked to. And so that's where that queue and I kinda comes into play. But here's those remote sessions are online, go live support that we can add on if you're interested. And this one right here would be essentially you're going to go live on X date. I would have to people from my project management team come out... and it would just be on-site for two days that you guys go live essentially ask them wherever you want to ask them service trade related and they'll fix it or they'll do it whatever it might be... external systems integrations. If you guys do want to hook up to Quickbooks, that will essentially be something we do on the back end for you guys.

--- Implementation and ongoing support ends ---

# **BRETT**

<sup>19:40</sup> But it's one of the very last step we'll do some testing there, make sure everything is accurate. Good to go... all the data that you sent us, Kevin. So customers location that good stuff. We don't want duplicates. We don't want that information going into service trade. So my team's going to review it if you got errors.

--- Deficiencies ---

#### **BRETT**

19:57 You got to fix anything like that. Essentially, we're going to send that back to you and we're going to say, hey, I need you to fix XY and Z. You're going to go fix that. You're going to send it back to us. We're going to review it and until it's correct, and then we're going to import it into service trade and you guys are going to go live.

--- Implementation and ongoing support ---

# **BRETT**

<sup>20:11</sup> So going live very definitely a time to sell it right there. And I'm gonna say we're not gonna leave you alone but in a good way because you're gonna have ongoing support with your service trade subscription, you can call us, email us, chat us on the website, any given time you'll get a response, but you guys will also have an account manager tied to your account.

--- Customer engagement ---

## **BRETT**

<sup>20:31</sup> So they essentially have like quarterly reviews with our customers. Let's look at your account at a really high level. See, are you guys getting the most value out of service trade? What can you, your text be doing better ticket to retain more customers to increase revenue, whatever it might be. And that's really what that process looks like?

KEVIN

20:54 Okay.

--- Implementation and ongoing support ---

#### **KEVIN**

21:06 Simple enough.

#### **BRETT**

<sup>21:08</sup> Simple. I mean, yeah, we're gonna essentially hold your hand and walk you through that process because it's not your job to implement software. You guys, if you go with us, you're paying us to do something for you and it's one get you guys up and running, teach you the program, but also provide valuable feedback into how you can use it better.

--- Purchase decision ---

#### BRETT

That being said, I know you're kind of in the infancy stages of this book it around at prices. But Kevin, what would the process look like for you guys adopting a new software? Would it be getting other people in your company involved? Is it just you thing?

#### KEVIN

21:42 Well, I mean, obviously, I gotta get our bookkeeper involved.

--- Accounting integrations ---

#### **KEVIN**

<sup>21:46</sup> I know it's already compatible with Quickbooks. We use Quickbooks. So that's not a huge thing. I don't know how that all works and ties in but I don't see that being an issue. And then, obviously, you know, I'm the manager here, but the owner also wants to find a better way to do what we're doing, but we don't just want to get away from paper and not have it be the perfect operating platform for us. You know, we only kinda wanna make delete one.

--- Purchase decision ---

# **BRETT**

<sup>22:15</sup> Couldn't agree with you more that's really why I do wreck recommend a demo if we could do a demo with you, is your owner apprentice?

#### **KEVIN**

	BRETT
22:26 And then who's your bookkeep	er?
	KEVIN

22:28 Our name is Kim.

#### **BRETT**

<sup>22:30</sup> Yeah. So my best recommendation Kevin is if those numbers make sense for you, I recommend all three of us, Kim, Francis yourself and myself doing a demo together.

--- Purchase decision ends ---

#### **BRETT**

<sup>22:40</sup> That way we can really focused on, hey, yeah, I know you guys want to get off paper, but like you said, that's not the only thing there's issues there, so.

#### **KEVIN**

<sup>22:47</sup> But at the same time, I mean, this business here has been running on paper for 40 plus years. Like they don't have to get away from paper. It needs to make sense for them, for the technicians and for everybody in the office.

#### BRETT

23:00 Agreed. And that's kinda why I'm recommending a whole demo. It's let's sit down and talk about it. Essentially the process for me is I want to show you guys.

--- Access to information ---

#### **BRETT**

23:09 Everything sounds like you use service trade for a really long time, but you might have used it from only like the technician point of view. Did you use it from the office ever?

#### **KEVIN**

23:18 Occasionally, but I mean, I wasn't using it every day, you know?

#### **BRETT**

<sup>23:23</sup> Yeah. So I think it would be good to get on a demo and deep dive into service trade. What can I do for you guys? What candidate?

--- Purchase decision ---

# **KEVIN**

23:30 You...

#### BRETT

23:30 Guys, let's figure out what the concerns are a	and then really drill down on
those concerns and see if service trade the answer of	or?

**KEVIN** 

23:42 I mean, I can assure you that your price point is better.

**BRETT** 

23:46 Better than who?

**KEVIN** 

23:49 I'm not at liberty to disclose this information.

**BRETT** 

23:52 And ask, you know, but all good.

*--- Type of work ---*

**KEVIN** 

23:56 It's not that's not fair, you know?

# **BRETT**

<sup>23:58</sup> No, I agree. I like to ask. Sometimes I hear a lot of the reason I ask a lot of companies come to me and they say, hey, we're looking at ServiceFusion and it, it's 10,000 dollars cheaper. And realistically, I've been working with service trade for three and a half years. I know a lot of these programs, I know what they do.

--- Accounting integrations ---

**KEVIN** 

<sup>24:17</sup> To be honest with you, if I had my choice, I use BuildOps.

**BRETT** 

24:21 What's that?

**KEVIN** 

<sup>24:23</sup> Why is that? Yeah, they have a just an amazing platform and a 100 percent just great program. I, that's the one I would use.

BRETT

24:35 Have you used that in the past?

24:36 No.

#### **BRETT**

24:38 Gotcha. We know about BuildOps. I will say that. I think it goes up quite.

--- Accounting integrations ends ---

**KEVIN** 

24:43 Hi, frankly, it's outrageous.

**BRETT** 

24:47 Price wise.

**KEVIN** 

24:47 Yeah.

#### BRETT

<sup>24:49</sup> I don't I'm not 100 percent sure what they cost. To be honest. I know I just got off a meeting. We were talking about it. I know BuildOps is really strong in the project management side, whereas service trade started really strong in the service side. I think.

--- *Type of work* ---

#### **KEVIN**

<sup>25:02</sup> When I joined and we as a whole kind of just need more of the service. Like, I mean, we probably do a couple of 100 service calls a week.

#### **BRETT**

25:12 Okay. Are you guys doing project work too?

# **KEVIN**

<sup>25:15</sup> Yes, but again, like we fix toilets, we fix air, conditioners, we fix boilers, you know, so they're just, it's nonstop when you think about.

--- Type of work ends ---

# **BRETT**

<sup>25:25</sup> Yeah, understandable. And I realistically, I think service trade can handle all those things. But that's why I recommend going through the meeting to actually talk about it. Let's take what you're seeing on the demo and apply it to every day jobs that you guys do.

#### KEVIN

<sup>25:41</sup> Well, what's nice is I have some numbers to work with and go and speak to them about. And then, you know, then we can all plan a day where they can join in and we can do the demo version with them being part of it.

# **BRETT**

<sup>25:54</sup> Yeah, absolutely. And it's really good to have multiple people in the room because you guys, you work together, you can bounce ideas off each other. I'm here to show you what the product can do and what it, what it's for, but it's up to you guys to figure out. Hey, does this fit our specific workflow?

#### **BRETT**

26:14 So, with that, would you say, I mean, when do you think you can talk to them about it?

#### **KEVIN**

<sup>26:18</sup> I mean, everyone's in the office today. I'll probably send an email out and see if I can get just a small meeting with them at some point this week? Maybe we'll touch base early next week?

#### **BRETT**

26:31 When you say we'll touch base early next week? You mean you and your team?

# **KEVIN**

<sup>26:34</sup> No, I'll touch base with you early next week. Okay. I'll probably talk to them about it this week depending on what they have going on. Yeah, I know we sit in offices next to each other but.

# **BRETT**

<sup>26:46</sup> Yeah. Okay. I'm just gonna put that on my calendar. I forget things, so I gotta write it down... but you touch base with me early next week and then, yeah, we could set up a demo for late next week if that makes sense for them, if not push to the next week whenever you guys have time essentially.

#### **KEVIN**

27:02 Okay. No, that sounds good.

#### **BRETT**

27:05 Cool. Is there anything Kevin that you need me to send you in the meantime?

## **KEVIN**

<sup>27:14</sup> I don't think so. In particular, even your website, I looked at like you can access some of the features and see stuff there. But if we're going to do a demo setup anyways, and you're going to be able to show them all that?

BRETT
$_{27:25}$ Yeah, I'll customize it specifically to what you guys do. And once we touch base next week, I'll probably have some questions for you just so I can cater the demo specifically to you guys.
KEVIN
27:34 I do have one question. The background on this thing over here, is that a picture

BRETT 27:42 Backgrounds... **KEVIN** 27:44 Path to success that's on the screen? **BRETT** 27:47 I'm a real if you, I don't know what that is, but Mike smile and I feel like, you know. **MIKE** 27:52 And now... **KEVIN** 27:53 Depth chart. **MIKE** 27:54 Yeah, it does. **BRETT** 27:56 It does kind of... or like a typography map. **KEVIN** 

# **BRETT**

<sup>28:03</sup> Good. You really threw me off there. I was like, I have no idea what's going on. Cool. Well, Kevin, I will look forward to hearing from you early next week. If I don't hear from you by like Wednesday, can I call you? Yeah, cool. From there, we will set up a meeting. We'll go through a demo. We'll see if service trade to fit.

# **KEVIN**

28:24 Okay. Thank you.

28:01 Was just a random question.

from navy onyx... you see this?

		BRETT
28:26	Awesome. Do you have a good da	y?
		KEVIN
28:27	Too. Take.	
		BRETT
28:28	Care. Thanks bye.	
		MIKE
28:31	Bye.	

The End