ServiceTrade Demo with Mantario Door Control Ltd.

Alec Ashby with Mantario Door Control Ltd.
Recorded on 3/14/23 via Zoom, 1 hour 18 min.

Participants

SERVICETRADE

Alec Ashby
Territory Manager

Quentin Cain
Territory Manager

OTHER

Adriano Iezzi

Adriano PC

Adriano Unknown

Topics

Transcript

--- Call Setup ---

ADRIANO

0:00 Can you hear me?

ALEC

0:01 Yeah, I can hear you. Can you hear me?

ADRIANO

0:03 Yeah. All good. Sorry, I got you on my phone and my computer at the same time.

ALEC

0:08 No worries, man. No worries. I apologize for coming in a little late. I had a meeting run super late, so I was talking a lot, so I was just trying to get to you but it's kinda kept talking.

ADRIANO

0:19 I'm very, I think I know exactly what I want and I just gotta make sure that we can fit you guys in our budget that's the challenge.

ALEC

0:29 Yeah, I was talking a little bit to queue. Who is the guy that you spoke to on the phone? To my understanding, you're trying to get to 12 K usd. Is that correct?

ADRIANO

0:43 No, I don't think that was right now. I'm spending seven K Canadian, which is like five K us... right? And you guys are like, he said we might like you only pay for tax and stuff like that. So I'm just trying to make the numbers work. So it's not... like three times the price of what we're currently paying, right?

ALEC

1:11 Right. Yeah. So.

ADRIANO

1:15 Here, how about this? I'll show you what I'm doing. I'll share my screen.

ALEC

1:18 Okay.

ADRIANO

1:20 And that way you can get an idea of what we're doing and then just gonna make sure I share the right screen here, which is a little pop up. You're good. Which screen do you see right now?

--- Call Setup ends ---

ALEC

1:38 I don't see one right now. I just...

ADRIANO

1:42 Share screen here. We go. Okay, should be able to see it now.

ALEC

1:50 Yeah, nice to you.

ADRIANO

1:52 Okay. So this is what we're currently.

ALEC

1:56 So, is our dispatch schedule or everything like this? So this?

ADRIANO

1:59 Our technicians. So I have one, two, three, four, five, six, seven is a helper. Eight. So eight technicians, we have one technician called dispatch because that's just the way raiser sync works. We have to put all of our calls into one and the rest are all internal. Okay, eight texts in the field that would need to use the app?

ALEC

2:30 So, because what's his name was telling me that you will need eight tax, and then four helpers. So it's actually just eight tax.

ADRIANO

2:39 It's eight technicians, two helpers.

ALEC

2:43 Okay.

ADRIANO

2:47 I guess I don't even really need it except for maybe you guys do time cards, right?

ALEC

2:55 Yeah, that would be an extra cost if you wanted to do that upfront. That basically that just kinda streamlines the payroll process. Is that something you, how do you guys do that now?

ADRIANO

3:06 Yeah. We're doing a kind of manual and we're looking for a payroll option, right? So I figure we like would this dumped it right into... I don't know how it would work, but it would calculate our over time and everything the way we set it up.

ALEC

3:22 Use...

ADRIANO

3:22 For payroll, we use one of these online services, but we, right now we're just using Google sheets, saying that we share internally. So it's manual... and then we just manually entered into our payroll system. Okay?

ALEC

3:41 Okay. So one option if you're trying to cut costs is obviously you could just keep doing that. If you wanted to do that, you're willing to invest a little bit more money. Give me one sec. We have this tool. It's called service time card. It's relatively inexpensive for what it does. It cost 14 dollars usd per month per technician build annual. What this is gonna do is they can submit a time card to a service manager or someone like yourself. What that's gonna do is seamlessly take that information, organize it. And then depending on what payroll system you can, you're using, you can either export it there or double data, enter it into there depending on what system based on what you told me probably be it'll take all that information organized. And then it's just simple data entry based on what you told me, but also just kinda depends on which one you're using.

ADRIANO

4:30 Yeah, we're using an online, most online companies for all of our payroll, but, you know, we use Quickbooks and then that gets translated into our payroll company. Okay. Yeah. So this is an extra 15 bucks a month.

ALEC

4:47 Yeah, if you want it upfront. Some companies don't do it upfront. Some do it just kinda depends.

ADRIANO

4:52 What you want. So hold on, let's go back to.

ALEC

4:56 Thing here. So this is my text.

ADRIANO

5:01 Schedule customers.

ADRIANO

5:09 Right. Cause some software systems I found don't even allow for like multiple addresses like here, I'll show you.

ALEC

5:22 Yeah, you're good. Wait, one second. Let me stop sharing my screen. Yeah, you good.

ADRIANO

5:30 But like this one, this is one of our biggest customers. So we probably have, I don't know, look at all these addresses we deal with.

ALEC

5:37 Right. Yeah.

ADRIANO

5:40 Right. And it just goes on and then the contacts are in the same screen, which is kinda the but...

ALEC

5:45 Well, I'm not know if you're saying that while showing, I'm just not seeing it. I don't know if that.

ADRIANO

5:50 Is it not working anywhere?

ALEC

5:53 You might just know have clicked the button. There we go. Now. I see it might be my internet has been a little...

ADRIANO

5:59 It jumped over to the wrong screen for some reason. So, okay. So, yeah. So this is like 250 addresses and the contacts are down here. So that's direct invoicing out of the system and the dumps. Once a day. I think manually it just once a day set a time to upload all the invoices... to our Quickbooks. And then, yeah. So I guess the one thing that we couldn't really find in other software systems and we're kinda used to this, but it doesn't mean we have to operate this way. So let's say we have, this is just any work order.

ALEC

6:42 We...

ADRIANO

6:43 Have, this is kind of our saying. So we have assigned to a person so that's a technician outside or inside. And then we have all these different status. So like we go back to the job two or three times sometimes because it's unique parts, we come back with parts, everything like that. So we can bullet parts and shop or given to sub contractors. So these are all the different statuses we can apply, right? Like needs painting needs, this needs that complete coda future quote required. So this is one thing we use all the time. I don't know if we're used to this. So I don't know how other companies operate right? And under your customer umbrella. But I kinda wanted to show you the couple of key things and maybe you can just show me your software and see what how it relates to what we're doing here.

ALEC

7:39 Yeah, that sounds like a plan. So there's really only two questions I really had for you before getting into it because I know you're busy got people to manage stuff like that. So what you told me is that it seems like raiser sync cannot handle. I don't know if it's the volume or like what it is, but could you just tell me a little bit more about why you guys are kind of seems like pretty determined to get off raiser sync or move in some kind of different direction?

ADRIANO

8:06 I'm gonna show you my screen on time. Can you see it? Yep? So this is their new launch, this thing, this is their new format. They're launching this. It looks prettier, all of this stuff. It glitches, it resets itself all the time. It's been a struggle. It's been a real struggle and they've been trying to launch this for six months and it's just been glitching and glitching. So this is their new system. So it's got the features we need, not all of them, you know, because there's a lot of other things that people offer that they don't... so we've basically been going to the old system when using this and we've noticed lately in the last couple of months, it's not saving things. We've lost work orders. There's a little bit of trust factor going on here.

ALEC

9:02 Yeah.

ADRIANO

9:03 So, and I just think we can do better so that's kind of why we're Shaw, okay?

ALEC

9:09 Yeah, no, I appreciate that. And I mean, is there any chance like let's say you don't find something that either fits your budget or fits your needs? Is there a chance that you would just stick with them and see how it goes? Is that?

ADRIANO

9:20 No, I think we're committed to switching. I'll tell you that right now we're definitely commit switching and everyone in here is frustrated and I'm taking the lead. I'm trying to locate a software. And right now we're looking at another software called Jobber and it's pretty slick, but it's missing a couple of features that we're a little concerned about, but... it's got some really cool front end stuff for customers can improve their quotes. It automatically converts the job in the system. It's got some really cool features. It just, I think it's more catered to be a business to consumer versus the business like we're commercial. All the deal with is property managers, Construction companies, big property owners with like, you know, 50 addresses. So we have like 50 addresses and 10 different contacts per site. And their system doesn't allow for like all these contacts. It's allows for all the addresses, but there's a couple of things they're missing, but it's also really inexpensive. So, right? Like I wanna say, it's like 300 a month. Us... it's very inexpensive.

ALEC

10:37 Your whole organization?

ADRIANO

10:39 Yeah.

ALEC

10:40 Wow. Yeah. I mean, so Jobber is a great platform. So what Jobber is gonna do for you? It's residential. Like you said, it's really good at just basic stuff like work orders, you know, just basic stuff. The main reason people purchase service trade is one we're geared for commercial.

ADRIANO

10:59 Yeah.

ALEC

11:00 So we help companies with their plan maintenance. So like if you guys do a lot of preventative maintenance, recurring service, we have a lot of automated ways to manage that. Another reason people like service trade is repair quoting. So we kinda streamlines the repair quoting process. If your guy goes out to a PM or service call, they can report a repair fairly easy. And then the office can flip that to a quote and the customer can approve it. Other things. We can track customer owned equipment. So typically commercial service contractors, they wanna track the equipment that you're working on, whether it be history or just general information about, I guess for you guys to be like access or stuff like that. Those are a couple of things. I mean depending on where you want to start there's things you can grow into the future and you guys do a lot of PMS repair quoting or what's kind of your.

ADRIANO

11:51 I only have, I only have one customer that we do a ton of PMS before and it's not that hard for us to do it. So I wouldn't say that would be something like we're looking to help with. I would say you guys also have purchasing, right?

ALEC

12:11 Define purchasing. What do you mean by that?

ADRIANO

12:13 You guys do POS, you guys can cut POS from your software?

ALEC

12:17 We can, but honestly, based on your budgetary concerns, I don't think you would wanna do that upfront. So we have this add on products called partsledger that I'll give you either a technician or office based on how you wanna do it, the ability to cut POS. Are you guys cutting POS in Quickbooks right now or are you guys doing that in like raise?

ADRIANO

12:35 Hi, we're actually using another software called spend wise?

ALEC

12:41 Okay. And how's that going?

ADRIANO

12:43 It's a very simple software. It's been bulletproof it's easy to use but we have to transfer. So basically, I'll take my work order and then I'll indicate the po number in the spend is po number into the raiser sync and that's how we track it, right? So when a part comes in, we can track it to the work order. Then we put the parts, we get the parts ready. And then we can work on the work order that's basically a second tedious system, right? So that's kinda how we've been running it with two different software systems. So if we could amalgamate the two, but... yeah, we just, yeah, let's not worry about the purchasing, maybe just walk me through your quote. You guys do leads as well plus quotes or is it just one or?

ALEC

13:32 So when you say leads, are you like saying like CRM functionality like?

ADRIANO

13:38 Yeah, I guess you say that. Like, so we'll get a customer like let me go over our business real quick.

ALEC

13:48 Yeah.

ADRIANO

13:49 Like doors, we service commercial doors, right? Aluminum you walkthrough them, we only do man doors. We don't do overhead doors. We do handicap operators. We do automatic sliding doors. So your local grocery store, I don't know where you're from but your local grocery store, those automatic sliding doors, we do those. So that's we'll call that 25, 35 percent of our business that's kinda like new

installs and that's not really a service call, but we put it into our system. So we know what's going on obviously, right? And then 65 percent of our calls would be like customer calls come on out. They know there's an hourly rate. We're going out there. We fixing it. And then we'll have customers. Hey, can you come out and quote me to replace this or that? So that would be nice to have a lead where we can generate that, assign that to a person so you can take the lead, convert it to a quote, the quote can get converted to a work order. So we can kinda see because right now we're manually creating a work order for quotation, you know, like a request for quote, you know what I mean? So that's what I'm saying by a lead?

ALEC

14:54 Okay. So in short, like our platform, we're like a field management platform. First, we're a light CRM. Yeah. So we're not gonna like, you know, manage opportunities. Now, I don't wanna keep telling you like what we could do in the future, what so like based on your budget, what we're gonna do is, you know, give you a field management platform that will work for commercial workflows. Okay? Now, if you need, you know, more robust CRM functionality based on what you're telling us, I don't know if our, so we have, we just acquired a company called Northboundary that's typically used for complicated proposals, but it's also like a more robust CRM. I don't really think that's what you would need based on what you?

ADRIANO

15:36 No, I don't need a huge CRM program. I really don't like it's a nice to have it's. Not a requirement, right? We don't have it. Now, we can keep functioning without it. So I'm not worried about that. So, okay.

ALEC

15:49 And then before I get into it, I just wanna make sure I'm only showing you things that are relevant, what are maybe like top three or five things you're really looking for the software to do?

ADRIANO

15:57 Okay. So we quote a job, we convert the job to an order to a work order. We want to be able to sign it, schedule it. And then I want a nice clean system on how to return to that work order when we have to go back, when the parts come in. Does that make sense?

ALEC

16:16 Yeah, it does anything else?

ADRIANO

16:20 Invoicing. Yeah, just... I think that's the nutshell the ability to like assign it to people? Yeah, you just wanna make sure nothing gets lost.

ALEC

16:37 Okay. So what providence are you in? Again? I'm sorry, I'm not the biggest. You're not in ontario, right?

ADRIANO

16:45 No, no, that's we're in manitoba, right in the middle of Canada, winnapeg, manatova.

ALEC

16:50 So, do you have like multiple is typically a tax? Can companies there's like two lines of tax. I think it's like a providence tax and something else that?

ADRIANO

16:58 Yeah. Okay. Yeah, tax, which is our federal tax. And then there's a provincial sales tax. So, and we actually, we only charge one tax to our customers. A good, the services tax that's it.

ALEC

17:12 Okay. Cause so in short, our Canadian companies are invoicing out of their accounting systems. Our invoicing doesn't really work the best for Canadians. So that's that as far as the other things, we can definitely do those things. So I could show you a couple of things. We can see if it's a good fit. I have some ideas of how much it will cost if you think is a viable option, we can continue.

ADRIANO

17:39 Walk me through it and then the numbers, the number, right? So let's just let's see what we look at, right?

ALEC

17:44 Yeah. Okay. Cool. Yeah, no worries. So I do apologize. I did, like I said, just hop out of once. Let me pull up this here. So give me one sec. So essentially in service trade, we're a commercial service platform. This is the office view. So we have the office view, the technician view the customer view. I'll try to get as many as we can get to today. So essentially like for example, I'm billing a target headquarters, but I service these five physical locations, each physical location will have its own page. It will all of under this one corporate umbrella.

ADRIANO

18:25 Okay. Then.

ALEC

18:28 If I click into this page, there's a couple of things that stand out. So I know you don't do too much of this right now, but if you ever grow into it more if it's something you're looking to manage more of that one customer you have, we have a pretty automated way of managing PMS to ensure none of them stuck through the cracks. I, it doesn't seem like it's too important to you right now. So I'm not gonna kinda harp on that too much, but just know if that's something you grow in the future that's

something we do well. Another thing that a lot of our customers like is since we're a commercial service platform, odds are you want to track your equipment, so you want to track the history. You want the technicians to have visibility on that, to limit internal calls as well as, you know, kinda take care of that customer, so to speak, so we can track multiple pieces of equipment. So I have an access store here. You can put as much or as little information in here as possible and even have an additional note section here. But we can see any services that are associated with this equipment. Any jobs, quotes, stuff like that. You can see all that here?

ADRIANO

19:30 So the tech can enter that in the field when they're doing an asset in an asset?

ALEC

19:36 This like a database you have now, or is this something you would maybe want to build out? If...

ADRIANO

19:40 We don't have that right now. Raiser does not offer this, but the thing I'm thinking of because we do handicap operators and we go back and we service them and we'll replace the control board. And then two months later, we'll go back and replace the motor gear box, right? So, but there is no easy way we have to look at the history on that address and look through all the work orders, right? We don't create like an asset on, we don't have a history per operator that makes sense. So this would actually help with that.

ALEC

20:12 Yeah. And do you guys deal a lot of internal calls as well? Or maybe they want to see what happened last time and you guys have to refer to past invoices or something like that?

ADRIANO

20:20 Yeah, it does happen. Yeah. And I like, we don't check it as much as we should probably sometimes, but.

ALEC

20:28 Okay. Yeah. So it will give you the ability to build this database. So if you want your technicians to build this database, they can add these assets in the field and you can build this database. And then like you said, I mean if we go back to this page here, you can see like, hey, what are all the jobs associated with target or if you want to get specific and be like, what are all the jobs associated with this piece of equipment, you can.

ADRIANO

20:49 That as well. Okay?

ALEC

20:51 So you...

ADRIANO

20:54 Create a quote for me and then convert it and then assign it. Could you do that?

ALEC

20:58 Yeah, absolutely. So there's two workflows to create quotes. You can either one just create a quote or two. If your technician goes out to the field and finds a repair opportunity? Is that something that happens frequently for you guys? Or is that not?

ADRIANO

21:13 All the time they say quote required, right? So the, it, in their work order, there's no fancy way. We just have to read the work order. And then it says like that status I showed you, it says the jobs complete, and then it says future quote required. But that's something we kinda developed as a manual or like a field, the custom field, right?

ALEC

21:38 Yeah. Okay. I got you. So I'll go out in the field and show you how your technician would report that. And then I'll show you how you would flip that to a quote in the office. Does that sound like a plan? Sure. Cool. And do you have a hard cut off today by chance? I just wanna make sure I'm being respectful of your time?

ADRIANO

21:53 No, no, I'm good.

ALEC

21:55 Okay. Okay, cool. So let me clock out of this job from last time. And so basically here, this is the technician mobile app can be used on iPhone, or android, a smartphone, or a tablet. What you're essentially looking at here are the appointments for today. There's all types of ways you can filter it, but click on the technician app. This is basically what they'd be looking at. So essentially, we have eight major tiles of information. I'm gonna go ahead and cruise to the main ones. But if you have any questions on any others, feel free to ask some of the main ones your technicians are gonna look at or what are the services we have today. So we can see a brief description of what are we here to work on? And what are we here to do... as far as that asset that's not only accessible for the office but the guys in the field can see that as well. So they can see any service history deficiencies, some simple information regarding this asset, they can see that as well.

ALEC

23:03 Another thing we can see on these site specific comments. So if there's like a code to get into a site or whatever you wanna put in there, they can see that just so that they're limiting more home office calls. So as far as reporting a repair, what we're gonna do is we have this thing called the deficiency loop. Essentially, what that's designed to do is increase pipeline back to the office. We wanna make it convenient for the technicians to report more repairs, get more pipeline to the office

and then the office and make it seamless to put that to a quote. So I'll show you how that will work. So if I click on this deficiency tile here and I click the add efficiency, we know technicians don't like to do a whole bunch of writing or typing, they can put in a simple description here of what they need or what you guys would need to quote this out. They can also go in here and record a brief audio. So we can see here that, hey, this is, hey, I found this, you know, repair on this door. It looks bad. We need to get the quote out today or something like that. They could do that.

ADRIANO

24:14 That's cool.

ALEC

24:17 Yeah. And you guys take like a lot of pictures and stuff like that too. When you.

ADRIANO

24:21 All the time, we have tons of bits. Okay?

ALEC

24:24 Okay. So yeah, we think, you know, I'm sure. If you already do that, I'm sure, like, you know, it helps the quote approval rate, you know, so you can also take pictures associated with this repair. So now we have a couple of media here. Once we're you know, satisfied with that, I'll go ahead and click next. I'm gonna select the severity. So I'm gonna say this is inoperable, not functioning.

ADRIANO

24:46 You know, what would be that voice recorder? Because we, we've hired some new cranes who just integrated, right?

ALEC

24:54 Right.

ADRIANO

24:55 And they're written English isn't the greatest, but they could speak better than they could write. So that would actually be helpful for that.

ALEC

25:05 Yeah. And then another idea too is some of our customers, I mean, depending on if this would be helpful for you or not, they can also record the repair, take a video of it. So when the customer gets a quote, they can hear it or see a video of it as well.

ADRIANO

25:18 Fly, they'll record the repair. Well?

ALEC

25:21 Yeah. Yeah. I mean, typically, if they have like, you know, three or five things of media, whether it be just the pictures or videos. I mean, the, you know, it's cause one thing just, you know, just see, you know, one picture or just no picture, another thing to see what's really going on. It's kinda hard to say, yeah, we don't really need this fixed. If, you know, it's pretty obvious that they need to fix. You know what I mean? Okay. So as far as that, so I select the severity. So I said that this was inoperable. I'm gonna associate it with that unit... from here, I can pick a service line. So, you know, for you, it could be, you know, commercial door, something along those lines.

ALEC

26:10 And then last, but not least, I'm gonna mark this as a new deficiency. Something I just found in the field today. What that will do is whoever in the office that's responsible for quoting this out, they'll essentially get an email notification in real time. The email notification is not just gonna say, hey, service tree found a deficiency. Go find it. It'll contain the exact link. That person will need to go ahead.

ADRIANO

26:33 So there's three of us in the office that quotes. So how does he send that deficiency to the right person?

ALEC

26:40 So it can, you can set it up to be sent to all of you guys. And I mean depending, is there like certain quotes that you send out or how does that typically go?

ADRIANO

26:50 Yeah, like we have one guy who kinda handles the quotes from the like the return calls for the we'll, call it the deficiencies, he handles most of them, but I do handle.

ALEC

27:02 Of them.

ADRIANO

27:04 I tend to handle a lot of the new quotes where people are phoning in, not from our technicians, gotcha. So.

ALEC

27:12 I would recommend having that person and what's his name.

ADRIANO

27:16 Don T be done. Who handles it. So he would send it to me then after, yes.

ALEC

27:21 So I'd say like, you know, so the email notifications, it's up to you on who you want to receive those. If you just want those to be you that's fine, or whatever I'd say

that you'd probably put on. Is the primary person quoting out these deficiencies, but you could be put on these emails as well. And then for fresh quotes, we're a pretty permission based platform. So if you only want to be doing the fresh quotes, you can set that up that way as well. It's kinda all kinds of ways. It just kinda depends on how.

ADRIANO

27:47 Want to set it up?

ALEC

27:50 Could you see this streamlining that process though on the technician? And I know you said you kinda have like a manual process for this now. I mean, do you see any benefits of doing it this way?

ADRIANO

28:01 Nice. That is a nice little feature. It's yeah, because as we have to do that drop down, the technicians always have to remember to put it in the right category. We're here. You won't forget because you're creating it from the scratch and it's going to the right person. So, you know, that's a nice, that's a nice operational component for sure. Okay?

ALEC

28:25 Cool. So I'll go ahead and show you what this will look like on the office end. So if we go back here... and I'll go ahead and refresh this page here, getting a little bit lost here. So if we go back to that job that I had here for today four o'clock so I'll go ahead and click on this job. What you'll notice is that everything comes in real time. So if we clock in, clock out that come back in real time. If we got any work acknowledgements or stuff like that, all that would come back in real time. So that deficiency, instead of you having a manual workflow, you'll have a little bucket here collecting all those for this specific job. So it can be one to however many you need. If we go here, you'll also receive an email notification. You can see here. We have multiple users on this could be however you want to set it up and what that's gonna take most likely down to. It seems like he does most of this in. It's gonna take them to this page. This is gonna give down. Hey, what are we here to look? What are we here to do is so simple description, all this kind of stuff up into a quote. You can simply click, add a quote and click create quote. Now from this page forward, if you create a quote from scratch, it's gonna be pretty similar. So you have a couple of options. So you can always go in here and manually add a description, manually adding parts, labor items that's typically best for more complicated or unique repairs, stuff like that. But for your more common repairs that, you know, our day to day, what a lot of our customers like to do is create these quote templates. Now, these are your templates. We don't force you using kind of verbiage or force you use any parts labor item. So I'll just use this. I know this doesn't pertain too much to your workflow. But I use this compressor replacement one just because this is one of the more built out ones we have in the system, you can see the description populates here, the items to add populate here as well. If we need to go in here and make any adjustments, the way this is formatted or the way this looks, we can do that before sending the customer. So the idea is that these templates are going to get you 80 90 percent of the way there. We just might need to go in and make any slide adjustments.

ADRIANO

30:46 So.

ALEC

30:49 For example, here, we have a grand total only or stuff like that. If we need to go in here and change these because maybe we use two. And then hey, parts are changing all the time. Maybe we need to do 30.

ALEC

31:05 Before I send this out to you, how does this kinda compare to the quoting you guys do now?

ADRIANO

31:11 You definitely have some shortcuts there for sure. Now, could you on a quote? Can you have default line items?

ALEC

31:21 What do you mean by default line items like?

ADRIANO

31:23 I quote... like when we create a service call, not even from a quote, let's say I create a service call. We have like truck charge miscellaneous, feel search charge and then labor all as line items when we create a service call. So, if the guy text out there, he's out there for two hours, we charge whatever 180 bucks. Then he adds the parts. And then when he closes it, he doesn't have to add the truck charge a miscellaneous. All of that stuff, you know, in invoicing, when we go to invoice, it, it's already there. We just tweak it a little bit, so.

ALEC

32:00 Seems like you have some labor minimums. Yeah. Yeah, that's what most people are that's smart. So, yeah, I can definitely walk you through how you could do that.

ADRIANO

32:11 That's all right. Yeah, I don't want to see it. I just want to know if it's possible that's all.

ALEC

32:14 It is, but it just depends on where you do it. Like for example, from our, what he said?

ADRIANO

32:22 From a job, let's say you went up to the top, you go to the jobs up top there and create a job.

ALEC

32:28 So that's just a job reports the best way to do that. So like let's say you have a job come in for target Pittsburgh and you want some default presets. Now, some people don't do that. You know, you could just put it in manually every time what you say.

ADRIANO

32:47 On this screen, yeah, there'd be a default.

ALEC

32:51 Yeah. So what you can do is we have these things called service templates. You can make a template. You see how some of these most of these are like PMS, but you can make a service template for just normal service call. I'd be a service template. You can apply it to multiple locations that have your minimum labor description, all that stuff. And then you can make adjustments based on what you need. So I know this obviously didn't really pertain to you and I have a lot of these in here because I talked to a good variety of verticals. But let's say I wanna create this job. I'm just going to sign it to myself. I've applied that service. So for you, this can be your typical service template. Okay? What that's gonna do is that's gonna apply... everything that's on that template. So you can see here the description, the parts labor items. And then if I need to go in and make any adjustments based on this visit, I can do that. Does that make sense? Yep? Is that something you guys have now or?

ADRIANO

33:58 Yeah. We have the default items but like not everything we do is a service call. Sometimes it's a quoted job, so that's getting that gets converted, but a lot of our calls if we're creating a job like a we're, not a quote, nothing like that, straight to a job. A customer sends it to us. It's usually time truck charge, feel search charge, and then time on site, right?

ALEC

34:25 Yeah. Okay. Yeah. So you can do that. And then if I send you this quote and they approve it, I can show you how you can seamlessly transition that to a job. And how do you pronounce your way by the way? Name? By the way, I don't want to Butcher it.

ADRIANO

34:38 Adriano.

ALEC

34:39 Adriano. Okay. So Adriano, I'll go ahead and I'll go ahead and send this over to you. This is a quote. It should be from a bar service. If you click that link and you click review and respond to quote, you should be able to look at it there. I'll take your time at looking at it. Would love to hear your thoughts. Good, better, indifferent. And when you approve it, just let me know and I could show you... what you wanna see.

ADRIANO

35:19 Got it. See since you quote... you respond.

ADRIANO

35:31 That's like how do I approve this? Can I approve it?

ALEC

35:36 If you click approve on that's when you can do that. And then if they have a po, they can put that in.

ADRIANO

35:42 Where's the approve button for this?

ALEC

35:45 So, what you're probably doing is you probably didn't did you click on review and respond to?

ADRIANO

35:50 I view... it should.

ALEC

35:54 To a page like...

ADRIANO

35:56 This at the very top is a link.

ALEC

35:58 Yeah.

ADRIANO

36:00 Okay. No comments, add comments. So I see the PDF... I have to full screen and the...

ALEC

36:09 You're good?

ADRIANO

36:12 At your P.

ADRIANO

36:20 Okay. Yeah. Like... that's slick and that just that po... will show up automatically.

ALEC

36:36 Yeah, I mean, do you ever spend time chasing that down?

ADRIANO

36:40 Yep. We spend time chasing down po numbers. You know what I mean? Because let's say customers typically email us say here's, the po number for quote number this, and then we have to manually put it in, you know, guys get busy and they forget to put the po number in. And then, you know, invoicing gotta Chase us down to make sure we get the po.

ALEC

37:00 Yep. So then when you create the job, that po will transfer over as well, but you can either create a job from this quote or just add it to an existing.

ADRIANO

37:08 So, here's a question for you. Do your customers almost train their clients to approve their quotes that way? So all of their quotes get approved that way or do they don't care and just let the emails and stuff like that and just do it manually? Like what are your customers typically do?

ALEC

37:26 Our customers? I mean, some of the reasons some of our biggest customers like a, I know you're not in the states but like a 1,000 truck companies, they get a lot out of this. They see a ton of ROI out of this. They're typically coating out of our system. And it's pretty easy for the customer to interact with. So they don't really have too much resistance upfront. But, you know, obviously, you're probably those one off customers that are like, well, just send me the quotes. The way you always send them have the option to download a PDF and print quote, but I'd say that or of our customers that are getting the most out of our system, they're typically quoting out of this for 98 percent of their customers. And then maybe those snail mail customers or, you know, whatever they kinda just adjust for those. But that's you know, like really this workflow has helped our customers on average see an increase in 23 point four percent in service repair revenue just because it's so fast and it gives them all the visibility they need to approve it or request changes or whatnot. But sorry, what were you saying?

ADRIANO

38:33 No, let's create the job. Let's see what that looks like.

ALEC

38:40 Okay. Yeah. So if I go here to create a job, you can see the po transfers over here. We have a couple of options here. So we can transfer all this. I can make a job due date. So I'm gonna say we're lucky and do today and then I can create a job from this quote... and then it's right here. And then if we need to schedule it.

ADRIANO

39:07 Schedule and whatnot so how do you look at all your jobs that you need to schedule?

ALEC

39:14 Great question. So, the best way to do that, there's multiple ways to do that. But the best way to do that is we have a dispatch board. So essentially, what we have is we have this, you see this, my internet is being a little bit slow. So if it's slow down a bit, I do apologize but you see this available jobs bucket here?

ADRIANO

39:37 Where are you?

ALEC

39:40 You see it now?

ADRIANO

39:41 No.

ALEC

39:42 So we have this concept in ServiceTrade called job types. So, you know, you can give different jobs, different job types, the way most of our customers do it is let's say, you know, you wanna prioritize these repair jobs. You would just simply go down here to repairs. We can see all the repair jobs we have done and we can schedule it accordingly. So these are.

ADRIANO

40:08 I thought she's kinda good for us too because we'll have like a service call, but then we're installing a new door in a frame and there's only like two crews that do that, right? So, or we're installing a automatic sliding door, so we can have that. So no... that's pretty nice. It's a nice feature.

ALEC

40:26 Yeah. And you know, like I said, our customers are getting a lot of this out of this now, but this is also a specific feature that I don't really know the specifics but I know we're putting a lot of product in development to even making this even more robust than it is. Now. So pretty simple stuff, you know, you can drag and drop add jobs from the screen as well. So... yeah, pretty simple stuff that's the best way to do it is just go to available jobs or if it's urgent, you can.

ADRIANO

40:57 To schedule it right there and then go to your, where would a completed job go when it's done ready for invoicing?

ALEC

41:03 So don't want to get too repetitive here, but there's a couple of ways you could see that. So what I'll draw your attention to is we have this concept. It's called the service dashboard. This is basically home based. What you'll see right when you log in to the office view of service trade. So basically, here, we have our service

dashboard. We can see a simplified daily schedule. So what's going on in the business today? We can see overdue jobs at appointments. So these are jobs that are slipped through the cracks. We need to get scheduled out. We have jobs that appointments during the next two weeks. So I put a due date on this job. If you know, if it's starting to slip or it's getting close, it's gonna pop up here.

ADRIANO

41:52 What if there's no, just... where would it show up? Just in jobs? It's never mind gotcha.

ALEC

42:01 Yeah, you're good. And then we have pass jobs to be marked complete. So, these are jobs where the technician has completed the work order on their end. They'll just go into this review bucket for someone like yourself or down to look over before passing on the billing. And then we have a completed jobs to be invoiced. These are jobs that have been completed. It just goes in this bucket here to now invoice. Now, like I said, our Canadian customers, they're invoicing out of their accounting system. So you, these to your accounting system?

ADRIANO

42:32 That, yeah, it's just invoice out of the accounting system, isn't ideal for us. I don't know, I guess because we're used to invoicing out of the current system, right?

ADRIANO

42:47 Yeah, I don't know if that's a killer, but what's the biggest issue with the Canadian customers, the tax code.

ALEC

42:56 Yeah. So, like, so, so this will be good. I can show you two things at once.

ADRIANO

43:03 I mean, I see.

ALEC

43:06 So, I'm sorry, I'm getting a little lost here because I know we've kinda gone through a lot. So if you let me go, let me go back to that job I was originally working on. So if we go here to this, I think this is the job yep. So you can see the target at Pittsburgh job. For once your technician completes this, I'll mark the services complete and the appointment as complete or yourself can look over and make sure everything looks good. You can click complete job. And when you click complete job, that's what's taking it out of this bucket and putting it into this bucket. And there's other reports you can run on that as well. But essentially, so I'll go ahead and complete job and create invoice. This is where we can double check. Hey, are these costs correct? All that good stuff and create here?

ALEC

44:00 So, you know, with it being the new year, some of our contracts in our system have not been updated. So if we need to ever go in and update these prices, you probably wouldn't be doing this though because you're going to be, if you use service trade, you would be invoicing out of Quickbooks, but I'll just go ahead and update it. So the reason is because like if I edit this... we can only have one line item of tax. It's not.

ADRIANO

44:24 I... think.

ALEC

44:27 Are...

ADRIANO

44:29 There other provinces or other businesses usually have to apply to taxes, right? Sales tax in the federal tax. We only have to apply one here. So we only have to like, can I set the tax rate to whatever I want?

ALEC

44:47 Yes, you could set this if you only have one tax rate, you can set it to seven stuff like that. Are they typically paying your, how are they paying the invoice now? Is that?

ADRIANO

44:58 It's the sub total plus the five percent goods and services tax it's called?

ALEC

45:06 Okay. And then, are they just paying that through the invoice? Are they like calling you guys up or how does that?

ADRIANO

45:12 Yeah, you usually just mail out a check, most people?

ALEC

45:15 Okay. Okay. So I mean you could send the invoice link. So if you send it, like I said, most of our Canadian customers don't do it. But as long as you're cool one tax rate.

ADRIANO

45:28 I...

ALEC

45:28 Can see, I didn't apply here, but this is what it would look like. You would have this pay now feature because our vendor, it's a company called stacks. They only

work with the states. Yeah, I've never, I'm not heard any updates on any of this changing. But if I get any, I'll let you know. One thing a lot of our customers like about these invoices is like, hey, you know, a lot of times the person you're invoicing isn't always the person that's paying the Bill. So, what we do is attach this service link that's gonna give them visibility on. Hey, what are the services we completed? Where the parts labor items we've used. We can see any media permission based, whatever you want them to see. And they can see, hey, we sent you a, so they're kind of in the, no, what's going on? So like when they look at this, they can't pay now because this is an American feature.

ADRIANO

46:19 Yeah, that's...

ALEC

46:21 They'll call you up.

ADRIANO

46:23 Can you set the invoice email as a default to one person as accounts payable person per customer?

ALEC

46:34 Good question. So you can have multiple roles here. I don't know if there's one that says specifically accounts payable, but I believe there's one that's like, let me see.

ADRIANO

46:43 You.

ALEC

46:44 Could boast like on primary job contact, there's all kinds of ones you can put.

ADRIANO

46:49 There's a financial one I notice. So, yeah.

ALEC

46:53 There it is long day. Yeah. So yeah, you can use that and make that the default for billing because what a lot of our customers do is remember that original concept I showed you at the beginning of the demo of like headquarters versus the specific locations, you can make a contact for your primary billing. If it's the same person for all five or you can.

ADRIANO

47:16 That's exactly what we do now, exactly same thing.

ALEC

47:22 Is raiser sync organize like that? Or is it a little bit different?

ADRIANO

47:26 Yours is sync will do. Yeah, it's kinda similar to all the addresses. I think... it's yeah, it's very similar.

ALEC

47:43 Okay. I just wanna make sure it would work. Cool. And then as far as how this gets to Quickbooks. I mean, you have two options here. You can always manually push it so that's an option or what most of our customers do is you can set it up as a sync. So every 10 minutes, 20 minutes, 30 minutes, however much you want it to take.

ADRIANO

48:03 Service... once a day at the end of the day, it sends out all the invoices. So.

ALEC

48:13 Yeah. So you could do that with us too, and are you guys on desktop online?

ADRIANO

48:19 Yeah, for Quickbooks, you mean?

ALEC

48:21 Yeah.

ADRIANO

48:22 Yeah, desktop only. Okay.

ALEC

48:25 Perfect.

ADRIANO

48:29 Cool.

ALEC

48:29 Is there anything else you'd wanna see today? I know we're kind of at the top of the hour here, and we've kinda gone through a lot pretty quickly.

ADRIANO

48:38 I guess the other thing is jobs, if we have a job open and we have to return, how do we see the time on site and stuff like that, do you have a job right now that you can show me?

ALEC

48:51 Yeah. So, I didn't clock into this job and on all these jobs, you can have multiple clock events. What that's also gonna do is take a GPS snapshot. So, if Alex 20 Miles away from this site, I'll let you know. It's not going to be like a live track or anything like that. So, three three kinds of ways you can track time, you can use all of them or just one we have on site we have in route and we have job, you can track all that information here.

ADRIANO

49:22 And, and there's no inventory, right?

ALEC

49:27 So, do you guys have a warehouse or truck inventory, right?

ADRIANO

49:29 Like right now, we don't do inventory. We wouldn't mind to do inventory on one product line like our automatic units, because that gets a little tricky to manage.

ALEC

49:45 Inventory, you're referring like, hey, I got two of these things in the warehouse or, hey, I got two of these things on the truck, right?

ADRIANO

49:51 Correct.

ALEC

49:52 Yeah. So, I mean, that's not something you're doing now. One cool thing about us is since we're built specifically for the workflows that you care about. We do have partsledger. I don't think, you know, based on your budget and what you've told me, I don't think that's something you would do upfront. But what partsledger is gonna do is give you the ability to cut POS, you can transfer trucks, what a lot of our customers like is like, hey, you know, Johnny is at walmart, and then I don't know Martin is at target, but Martin has the part that he needs. You can transfer it. You know, there's stuff like that that's something you could grow into in the future. I don't if you're not doing it now, it's probably not necessary now, but you can do that.

ADRIANO

50:34 So... so if we had nine texts, one helper, no, what did I say? Eight text, two helpers? Yeah... to get everything you need because you had like three levels, right? Which level do I need?

ALEC

50:56 So, everything I've covered today is on the select plan based on your needs and your budget. I'd recommend this.

ADRIANO

51:04 What is the next level?

ALEC

51:07 Next level that's gonna do is give you the ability. So if you upgrade a partsledger, you wouldn't need to be a premium customer to get that. The main thing that upgrades people from to, from select to premium is a customer portal that's basically gives your customers the ability to go on your website request service. They can also see specific quotes, specific history units.

--- Pricing ---

ADRIANO

51:33 That's slick. That is really slick. Okay.

ALEC

51:38 Yeah. I mean, I, I'd imagine that if you move forward with us, you'd eventually upgrade to that... to be honest.

ADRIANO

51:49 Is there, he said there's a separate price for the helper guy, but I guess we would even need the helpers on. So I'm looking at 89 as everyone in the office does not pay, right? It's just a field tax.

ALEC

52:01 Right. So, what you're referring to right there, what you're referring to right there is that's just the annual cost that does not include onboarding cost. But in short, yes, no office users are charged and you're saying you don't think you would need helper licenses?

ADRIANO

52:20 Yeah. If we're not gonna use the clock in thing, I'd say forget to help for licenses. So... I 712 a month times 1,285 100. What's onboarding costs?

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ALEC

52:34 So it depends, let me well, one sec. So it seems like you don't have an equipment database built out yet. Like that's something you'd potentially be building out with ServiceTrade.

ADRIANO

52:49 Yeah, slowly. Yeah.

ALEC

52:51 Yeah, no rush. Yeah. So let me pull it up here while I'm pulling this up and kind of figuring out how much it would cost for you. I mean, what are the main things you liked about the demo today?

ADRIANO

53:07 Like you're quoting... I like your ability on the... on your line items. You had all of those presets which is pretty cool. And then you're categorizing... from the schedule there. You know what I mean? So I could do like a like you categorize a job that says doors or an ad, or just like a service call for like door hardware, right? So, those are like three main categories we have. And like every tech I have can do door hardware, but not every tech I have can rip out a door frame and install it or not every tech and put an automatic sliding door in, right? So... okay.

ALEC

53:54 Yeah, cool. Is there any functionality we haven't gone over that we would need to go over for you to make a decision?

ADRIANO

54:06 Just trying to think what else is there... locations? No. Yeah, I think the biggest thing is just as long as we can... track the biggest thing we struggle with even with raisers. And I think every software has the same challenges when you're going to the job site multiple times, right? I think that's the biggest struggle for us... like first visit, second visit, third visit. Raiser doesn't do that. So, we basically only know that it's a second shouldn't say like the text notes is kind of how we know how many times he's been there. There is a workflow in raiser that shows the history of that work order where it's been who it was assigned to or, you know, the technicians been there. So there is a bit of a history there, but you have to do some digging to see that it's not like in your face, you know what I mean? And really available.

ALEC

55:12 Yeah. So it seems like just some manual workarounds. Is that fair to say?

ADRIANO

55:16 Yeah.

ALEC

55:18 Okay. So let me go find that original job because I could, so so we can do that too well. I've already invoiced this one out. Okay, let me reopen this. Let me see if that'll work. Yeah, that'll work. Okay? So we have this concept and I don't want to get too in the weeds on this because this can get a little confusing, but you can either have multiple services on a job or multiple appointments. So if it's one service, if it's one job and it's like three phases, you can add multiple appointments. You can either, the best way to do this. Probably in our system in my opinion is if you kind of have an idea of what the phases are gonna be, add those upfront. You don't have to schedule all of them upfront, but just schedule the first one obviously. So you can add, you know, multiple services. These can either be an existing or a new one. And then you can add multiple appointments. So if you need to go out multiple times, you can do that and we have this.

ADRIANO

56:18 Given...

ALEC

56:21 Sorry, what did you say?

ADRIANO

56:22 Internal notes?

ALEC

56:24 Yep. So kind of a separate subject, but if we want to on any page in service trade, whether well, not any page, but whether it be like a location or a job, you have these comments, these can be site specific comments. These can be comments regarding the job. So, for example, at target, I have alarm code one five two three. I have, you know, internal note. Maybe I don't want to send Billy out there stuff like that. These can be billing comments, technician comments, job comments, all that fun stuff. And then also to, on the job. If your technician leave some comments on this, you can see those as well. And then you can even filter like, hey, I wanna see only tech notes. So you can see some notes that I've left in the past.

ADRIANO

57:10 See my notes on this job? Like we have a box for internal notes. So for example, I've ordered parts for this job. I reference a po number and it lives on the job. Those notes, how do I see that?

ALEC

57:27 So what would you put in the notes again?

ADRIANO

57:29 I'd say like 10 dates, po number 1,726 sent po to BG distribution for these parts on this date. Eta is two weeks out type of thing.

ALEC

57:45 Yep. So you could make that only your company. I'd probably classify that as a billing note and you could put that here.

ADRIANO

57:51 Okay. Yeah.

ALEC

57:54 And then as far as putting that in, so basically, you can put that information here. So if we wanted to go to parts vendor, I can pick one here. So I'll pick home depot. I already have the purchase order number. I can put that in here. I'll say I ordered it and then.

ADRIANO

58:18 Yeah. So that's what we do, what you just doing there? It's...

ALEC

58:23 Yeah. How does that compare to what you do now?

ADRIANO

58:25 We have to manually do it in a box and then somebody has to read it.

ALEC

58:32 Yeah. The only thing with this workflow is you'll just have to use that software to generate the po and put it in. But it seems like.

ADRIANO

58:38 Yeah, that's fine because that software works great. So we actually enjoy using the other software. We're not looking to get rid of it, but... down the line, who knows? Okay. So if you hit okay. So here's a question for you. So now perfect situation, we've ordered that part. It's coming in two weeks. Where does this job sit? Like what status do I give it? The parts two weeks away? Now, what happens?

ALEC

59:04 So, it's gonna be either incomplete or partially complete... based on how many appointments it is. But I think what you're getting at, sorry, my internet is being weird. Let me go to this one. So I think what you're saying, can I pull a report? Hey, what are all the parts that need to be ordered? So I can pull it up and then mark it that it's been delivered? Is that kind of what you're getting at?

ADRIANO

59:30 Well, like I wanna see like right now I can look up because of our status is like I have 22 jobs and parts on order status. And then when it comes in, we reference, so I just, my guy can type in the po number and then it'll pull up the job number, right? Receive the products and then take the job and take it from incomplete to dispatch, right?

ALEC

1:00:03 Yeah. So let me see here. So it seems like could you say that one more time? I didn't quite, I'll be completely honest. I did not quite catch a look.

ADRIANO

1:00:19 So, now we ordered these parts, they're two weeks away, right?

ALEC

1:00:22 Yeah. What is?

ADRIANO

1:00:23 What is the job set in? Just incomplete status?

ALEC

1:00:27 Yeah, I'll set in partially complete or incomplete status.

ADRIANO

1:00:32 So when we go to click on it, then, how do we know without opening the job every time that it's on part required parts are required? Is there like a... quick way to tell that work order is waiting for parts or do you have to open it up and read it? So we're...

ALEC

1:00:51 Yeah. So, been a long day. I know how to run this report but it's taking me this long to find the button. So it's called jobs. With this is why you're this is we're going to be saving you so much time.

ADRIANO

1:01:03 Parts to be ordered. My God.

ALEC

1:01:06 Yeah, yeah, I thought you would like that. Yeah. So that's because I kept, you know, like a disclosure, I had like I had a meeting that went like two hours and 30 minutes before this one. So I usually, I'm being pretty short with it, but yeah, so that's what you're gonna click and I'm not going to bore you with the amount of filters I could put on this, but I could see.

ADRIANO

1:01:28 We need.

ALEC

1:01:29 What do you say? Yep? And you could just search that. And as far as, you know, while we're on the subject of reporting, I mean, do you guys ever have issues tracking the status of quotes as well or knowing what quotes to follow up on?

ADRIANO

1:01:49 To be honest, we're so busy that we don't even follow up on quotes right now?

ALEC

1:01:54 That's fine. What most people tell me because there's just so much work out there, you know?

ADRIANO

1:02:00 That we don't need to really Chase down our quotes... but closing rate at the end of the year. Like, hey, we've quoted, you know, 10,000 jobs and we got 7,200 of them, right?

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ALEC

1:02:14 That's something, you know, you'll actually, you know, once you complete implementation, that's something that your account manager can actually go through you every quarter if you want. If you want to see, hey, what was our quote approval rate? And quarter two? You can talk with them every quarter and they can pull up these statistics for you. But in short, so I mean, if you don't have the time to do it, I don't know how relevant this is. But if you just wanted to see, you know, I'm not, it's kinda similar the job report, but if you wanna see, hey, what are all the jobs in the last two months that have been submitted? But maybe they're viewed. So that means that they've looked at them, they just haven't you know, clicked on anything you.

ADRIANO

1:02:50 Can pull all.

ALEC

1:02:51 These up prioritize here based on the right. So some of these might have a little bit more priority over others. And then we can go in here and click this view. So you have a couple of options, either call them up individually or if you guys don't have a lot of time, send these involved to the customer. Odds are they just need to see it in front of their face again to make an empower decision. And then with all the pictures stuff like that, you'll put on the quotes. I'm sure that at least get you two or three more approved month if you just have the ability to send them a quick, but I'd like you be the judge of that obviously.

ADRIANO

1:03:23 Yeah. All right.

ALEC

1:03:25 Yeah. Okay. Sorry, my interruption.

ADRIANO

1:03:30 No, no, sorry, I keep interrupting you, but... yeah. So this has got everything. We kinda need. What is the onboarding cost? Like do you guys charge by the month or time on the phone? Like how does that work? Yeah, I heard on cost yet before?

ALEC

1:03:50 You're good. So we take onboarding very seriously. That's why we have over a 90 percent customer retention rate. Meaning that if 10 companies sign up with service trade nine, sticking with this long term. So if I go here just to give you a good visual graphic of onboarding, essentially, once, you know, move forward with service

trade, you'd be assigned a project manager. Their job is to get all your data from Quickbooks, raise or sync wherever you host it, get that into service trade. Basically their job. Like I said, I get that data in your technicians would have training office admin make sure they're getting trained, you'll have a weekly meeting with them. A company of your size is typically getting onboarded on average in 72 days, but we give you 90 some do 60 some do 90 just kinda depends. We'll go as fast as you want to go. Once all that's set, you get passed off to an account manager. So their job is to make you happy. You know, you can have those quarterly meetings with them if you want. And you know, if you ever want to upgrade the products in the future, but in short, not, you know, beat around the Bush. You said nine technicians, no helpers or eight. I can't quite remember.

ADRIANO

1:04:58 For nine technicians, no helpers.

ALEC

1:05:01 Yep. So this is what you'd be looking at usd. So your first year total. So like I said, we Bill annual. So your first year total with onboarding, you'd be looking at, make sure this is correct. Yep, that's correct. Okay. So, you'd be looking at 12,762 bucks build annual usd. Like I said, it's gonna cover the onboarding cost project. You know, the project manager, all that good stuff I just went through with you. And then your annual subscription year over year, you'd be looking at slightly under 10 case 9,600.

ADRIANO

1:05:39 12 bucks. So the subscription is paid monthly?

ALEC

1:05:46 No, it's annual cost. So it's every year. So you pay us once a year?

ADRIANO

1:05:50 Okay. Okay. So like convert that. So like 17?

ALEC

1:06:04 Yeah. Yeah. You would know better than me in the state. So, yeah, I know the...

ADRIANO

1:06:10 Yeah, it was better when I was at part one. All right. Yeah, leave this with me. I guess I'm all this over, talk to my partner about it and see, but he says, can you send me the?

ALEC

1:06:30 The video for this so?

ADRIANO

1:06:31 He can see it?

ALEC

1:06:33 Yeah, or I could demo him. Do you think he'll have the time to talk with me or would he prefer to just look at it himself?

ADRIANO

1:06:39 I think, yeah, I think you'd probably just wanna look at it. You don't do a downloadable trial, right?

ALEC

1:06:45 Now, reason we do that is kinda like giving you a house without furniture. And as well as even if I, you know, do give you that you're not going to have support. You're not really going to know how to use it so to speak. So that's kind of why we don't do that, but I can have the recording. I mean, do you think this is feasible for your budget? Obviously, it seems like you've seen a lot of ROI and does everything you want. But obviously, I wanna make sure it'll work for your price range. I mean, is this something you can actually, you know, feasibly do, or is this like something in the range or what's kind of your initial impressions?

ADRIANO

1:07:18 It's like anything like you can make it work. It just comes off the bottom line, but hopefully it picks it up other where other places, right? And like we have to make a change because what we're currently doing is it's we can't scale any bigger than we are with what we have that I know. So.

ALEC

1:07:40 You guys trying to scale? It seems like...

ADRIANO

1:07:43 It's you.

ALEC

1:07:44 Know I was working...

ADRIANO

1:07:44 On it a little bit and then I had to pull the rears on this horse back a little bit because...

ALEC

1:07:51 We...

ADRIANO

1:07:52 Were getting overwhelmed like we were just overwhelmed and couldn't keep up, couldn't find manpower. We've leased up our manpower a little bit, but it's not an easy thing to just, you know, it's 100 grand to put another Van on the road with the technician inside of it. The problem is finding a technician to put inside of it.

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ALEC

1:08:10 Yeah. Yeah. No. If I could, if I could start a recruiting agency that could supply technicians to mechanical contractors, I wanna be working here and I'd probably be making millions of dollars. So, yeah, I get that. What our kind of philosophy is that labor shortage. Unfortunately, it's not going anywhere there's a lot of skilled, you know, technicians leaving the workforce. We try to get, you help you get the most out of the technicians you have, because it is pretty hard to get them. And then, you know, yeah. So, yeah, no, but I definitely, I get that. And what service street is gonna do for your company? Like if you're looking for something that would just work, we're not going to be the cheapest solution. I'm not gonna hide from that. But if you're looking for something that you can scale with grow with. So you're not having to change platforms every time you reach a new phase of your business, we are that vendor for you. So it just kinda depends on, you know, where your priorities at or so to speak, and what was your?

ADRIANO

1:09:05 Partner's...

ALEC

1:09:06 Name just so I know.

ADRIANO

1:09:08 Bill.

ALEC

1:09:10 Bill's priority similar to you or is there anything he'll care about that you maybe haven't talked about?

ADRIANO

1:09:16 A lot of the invoicing. So when you said invoicing wouldn't work, I know you would just probably shoot it down but the fact that you only, you could do one tax, I think we can make it work. Yeah.

ALEC

1:09:26 Yeah, that's the big thing that's the reason we, yeah. So if you have one text, I mean, I had a guy that was about, he might move forward later, but he was about to move forward and we, you know, I got my VP on the call just to make sure I wasn't over promising. So I know that's something we can do. It's just as long as you're cool with them, keep paying check.

ADRIANO

1:09:42 That's fine as long as I can, you know, put three letters there and a percent of five percent. That's all I need. Okay?

ALEC

1:09:51 Cool. I know. When do you think you can meet with?

ADRIANO

1:09:58 He's actually gone on holidays for the rest of the week, the bugger. So I won't see him on Monday. So I'll yeah, but maybe I'll send him the video and while he's drinking his beer, you can actually watch the.

ALEC

1:10:11 Yeah, I don't yeah, yeah, I don't yeah, it'd been pretty funny, but yeah, yeah, you could definitely do that if he wants or if he wants to put it off till next week, that's totally fine with me. Cool. So, are Mondays bad day to call you a good day? Or, I mean, where do you?

ADRIANO

1:10:31 Or Monday is ever a good day to call?

ALEC

1:10:32 I don't...

ADRIANO

1:10:34 Tuesday morning... yeah, say Tuesday afternoon if you want to give me a call.

ALEC

1:10:40 Okay. I could do three 30 or one, whatever you prefer.

ADRIANO

1:10:48 What is the phone call type of thing?

ALEC

1:10:50 Really? What I would want to get accomplished on that call? See what bills impressions of the platform were, see, you know, where you guys are at, as far as your evaluation, I'm sure you're looking at others and see if we need to demo anything else. It is the into the corner. So this is a thing where I can sweeten the pot a little bit to get you guys in because I know it's a little bit more higher barrier to entry than, you know, a us company obviously more than happy to go to bat for you. It's just at that point, I wanna make sure that it's something you guys are pretty close

to doing. You know, I'm more than happy to do that for you as well. But really, I just kinda want to get an idea of where you're at.

ADRIANO

1:11:29 We could do this in Canadian dollars. It'd be awesome.

ALEC

1:11:32 You know, it's so funny. You said that because I literally, I walked up to one of my managers and I was like, hey, this guy I'm talking to, I think he'll be a good fit anyway. We could just charge him Canadian or like, yeah, unfortunately, you can't do that. I actually asked that a little bit above my pay grade man, but.

ADRIANO

1:11:53 Up on the platform?

ALEC

1:11:55 What do you say?

ADRIANO

1:11:56 Big customers do you have on this?

ALEC

1:11:58 So 1,000, how long you guys been around 10 years, multiple rounds of funding? I think our last big round of funding. We got an 85,000,000 dollar investment from JM.

ADRIANO

1:12:08 About two years ago... wow, it was funny because I was talking to build a... BuildOps yesterday, and when we've talked to pricing, it's just like his prices were probably slightly higher than yours. But it was like by the end of it, it's like let's make a deal if you're serious, like we'll make the price work, name your price. And I was just like, it was a little weird.

ALEC

1:12:40 Definitely. I mean, it's a good platform. They are more like project based my understanding, but... they can be really aggressive. Sometimes to be honest, they'll just like it makes no sense. They'll just, I know that we've had opportunities where they'll just cut their pricing 50 percent to beat us out. And it's like, I mean, I don't know why they're doing that. That's...

ADRIANO

1:13:01 They do well grab a market share because at the end of the day, if you've paid for the software and you get more people on it, you know what I mean? Like, I know there's maintenance costs to it for sure. But once it's built out, right? Like some companies build it out. And, yeah, because I hear Jobber gets a lot of flagged because

I think Jobber is a phenomenal job marketing themselves, but I don't know if they invest a ton into it.

ALEC

1:13:29 It's not that they don't want to. They probably just don't have the capital to do it. You know what I mean? And it's like if you're gonna like, you have to think about it from there. Like if I'm the CEO of Jobber and I'm going to investing firm like JM. I don't really, we have others, I don't know them off the top of my head. And you're like, hey, we only work with small residential companies and we're good at what we do, but there's nothing incredibly, you know, it's a good platform, but like, you know, they're not, you know, it's just kind of like, I don't even know how to describe it's. A good platform. I'm not trying to say it's not a bad platform, but I'm just saying like pitching service trade or something like that to an investor compared to Jobber. It's a totally different conversation because it's like, well, can Jobber sell to a 1,000 truck company in the future? You know, probably not, you know? So.

ADRIANO

1:14:19 Yeah... I don't know if I even want to grow this to a 12 then company.

ALEC

1:14:28 And, and that's fine too. We work with companies. I mean, I'd say, you know, we work with a lot of companies of your size, that, you know, kinda stay around the same size. And at the end of the day, they want to get the most out of what they have and make themselves more efficient and make sure their customers are happy and we can.

ADRIANO

1:14:47 What's your average customer size? How many tracks like 20 30?

ALEC

1:14:50 Yeah, that's a good question. I don't know if I know that off the top of my head, I would say like, so like I would say like for your type of work, our average size is probably in between eight to 30, but we have a lot of companies that have three trucks on the road a lot with more, but we do have a ton of companies that are in between that eight to 30 range.

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ALEC

1:15:15 I'd say that it's like, it's not like, I don't have like a 22 point three off the top of my head or anything like that. But yeah, I'd say between eight and 30 on average for this for the work you do. Okay?

ADRIANO

1:15:32 No.

ALEC

1:15:32 Just...

ADRIANO

1:15:33 The program and then... yeah, send me that video and then give me a call next week and we'll go from there.

--- Wrap-up ---

ALEC

1:15:40 Okay. And what's the best is, let me see here is the number. I wanna make sure the right number.

ADRIANO

1:15:50 Internets being weird.

ALEC

1:15:53 So, I had your number here to reach out to you at... one. I'm sorry, man, my internet is being slow. So I...

ADRIANO

1:16:05 Two.

ALEC

1:16:06 Four, two three seven, eight, two nine seven. Is that a good number?

ADRIANO

1:16:10 Yeah, that's our main line.

ALEC

1:16:13 Okay. Cool. And then you said, I'm sorry, are you one sec too? I'm sorry, you said, what time zone? Did you say you were? I didn't quite catch that.

ADRIANO

1:16:25 Central, I'm an hour behind you. So you're eastern?

ALEC

1:16:29 Cool. Can I give you a call one your time on Tuesday that works? Yeah, I'll send you an email the day before just to make sure that time still works for you. What we'll do on that call is talk see how your discussion went with Bill, see kind of where you're at, like I said, more than happy to sweeten the pot a little bit for you. Obviously, you know, that we don't really have to, you know, I'm not gonna do anything crazy like you kinda mentioned that BuildOps was doing, but I can definitely, you know, knock off a little bit of this if that's something that's enticing to you or?

ADRIANO

1:17:02 What you need to.

ALEC

1:17:03 Get over the line and yeah, we'll just go from there. I mean, do you have any other questions for me before talk to you next week?

ADRIANO

1:17:13 No, I think we're good right now.

ALEC

1:17:15 And then just one last thing, it seems like the time card you're cool. Just growing that in the future as I did not include that on this.

ADRIANO

1:17:23 Yeah, that's a nice to have for sure. That would.

ALEC

1:17:28 That's what most people say. So there no worries. Okay. I just wanna make sure because I didn't want you to, you know, if you did potentially move forward. And then like two months later, I learned that like I didn't I just wanna make sure I'm sending the right.

ADRIANO

1:17:37 Expectation with, yeah, yeah, no, no. If we negotiate price, they'll be including that for sure. Okay, cool.

ALEC

1:17:47 All good. All right. I'll see you next week, man. If you have any questions, I'll send you a recap email probably tomorrow because I do have to head out. I'll have.

ADRIANO

1:17:53 A quote.

ALEC

1:17:54 On there, it'll have the recording. You can forward it over to Bill. And then we'll go from there. Sounds good, man. Okay, man. I appreciate your time. Yeah, no problem. You have a good one. Okay? Bye.

The End