ServiceTrade Demo with Harrison-Orr Air Conditioning LLC

Matt Hetrick with Harrison-Orr Air Conditioning LLC
Recorded on 12/13/23 via Zoom, 2 hour s 18 min.

Participants

SERVICETRADE

Matt Hetrick
Field Manager

Brian Corridore
SDR

HARRISON-ORR AIR CONDITIONING LLC

Troy Winkler
Service Technician

OTHER

Phone Caller #1

Topics

Transcript

TROY

0:00 Hello?

MATT

0:01 Good afternoon.

TROY

0:01 Hey, I'm gonna use my phone for our speaker because the one on our computer is acting up here.

MATT

0:08 Okay.

TROY

0:09 Yeah. So I've got you there and then I've got you on the big screen.

MATT

0:13 Okay. Good, good. I was hoping everybody didn't have to crowd around to look at service trade on the little phone screen.

TROY

0:22 Yeah. Alicia and Richard are running just a few minutes behind, but they'll be here in a minute. Okay. Yeah.

MATT

0:30 What's a, Lisa's last name? I know it starts with the SE based on the e-mail...

TROY

0:35 Or?

MATT

0:36 Mark? Okay. And what's her role over there?

TROY

0:40 She does all of the invoicing and billing.

--- *Type of work* ---

MATT

0:48 And who's the other one? You said that's running a little behind?

TROY

0:51 Richard hall, he's the plumbing supervisor he runs. I mean, he basically takes care of all the plumbing service technicians. So, all of the, you know, when we get a plumbing call, you know, once the dispatcher gets it, they usually get with him on the scheduling of the call and all that good stuff.

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

TROY

1:11 So, yeah. So, and then Joey our dispatcher, he was gonna be in here, but he's behind on some stuff and I think he's gonna be a break away. Okay? He was at a funeral yesterday, so he's like man. I'm really behind. I got it. You know, you need to do it.

MATT

1:32 Yeah. That's that's a tough one that's kind of an negotiable.

TROY

1:35 Yeah. So, anyway, but they'll be here in just a second, but.

MATT

1:42 You got on there with you?

TROY

1:44 Who?

MATT

1:45 Are...

TROY

1:45 No, he's actually at the sheet metal apprentice meeting for the new apprentices this afternoon. Yeah, I tried to get, he has more meetings than anybody I've ever seen in my life, so.

MATT

2:01 Price is being important, I suppose.

TROY

2:03 Yeah. That's the role of the boss, right? He used to. He used to go to all the meetings. Yeah. Well.

MATT

2:12 Well, while we wait for them, I was just, I was looking through some of the notes I took from the conversation we had last week and would love to just color in some of them.

--- Accounting integrations ---

MATT

2:21 We spent an hour and I got a lot of great information, but I found I still had a few things I was curious about for you guys. I don't know if you saw my e-mail but I remember looking back through my notes. You did in fact tell me the new ERP that was bought. Is there a time line on rolling that out for you guys?

TROY

2:43 Well, no, that's really been the hanging up for everything is I think because, you know, and I haven't got to see it. That's the problem kind of, you know, it's like, well, I don't even know what it looks like to be honest with you, but it's supposed to do accounting project management. It's got service built into it. You know, it's kinda the whole thing. And I think the way the accounting is set up because our accounting system is sold, that there's a whole lot of apprehension of, you know, trying to pull the trigger to actually move in that direction.

--- Purchase decision ---

TROY

3:30 You know, you know, I don't think they've had a spot to slow down to really, you know, I don't wanna say they're scared to do it. I think it's a timing thing, you know?

MATT

3:42 Yeah, like.

TROY

3:43 Right now, the, our end of the year is in the fiscal year ends in October.

--- Purchase decision ends ---

TROY

3:48 So, the past, you know, right now they're still in the middle of all of that. And then once they roll out of that, well, then we start our business. You know, it's like we never really get, a spot to do anything. So, I mean, I think he would really like to do it. I think it's just a matter of when Alicia is here. Now, she just walked in.

MATT

4:11 Wonderful. Welcome, Alicia.

TROY

4:12 He's avoiding the Cameron.

MATT

4:15 They tend to, I'm used to that. See what looks like? Hey Lisa, my name's Matt. Nice to meet you.

TROY

4:22 I think.

TROY

4:22 So... so.

MATT

4:26 Yeah, that's good to know Troy like I said on our last call because I have so many of these conversations and I'm dealing with so many of these, you know, pending business processes and kinda the inter office politics of how these decisions go down. I can already kinda predict how this will play out for you guys. I'm guessing they will hold off on any new service purchases until they roll out what they've already purchased on the accounting side. Then their inclination will be, well, this thing already supposedly does something for the service department. So let's at least pilot this, see how it works. And then if all of that gets in place and you guys are satisfied with that module, then you'll probably more likely be in a position to Garner support from the execs in terms of any software tools that you're entertaining off on the side. What do you think of my prediction?

TROY

5:32 You know, it's probably that I've been thinking a lot about that just because, you know, I don't know what that software cost. I know it's expensive, and this is something you'll have to forgive my ignorance on software because I'm not a software person. I don't really know, you know, like they bought that and yours is a subscription. Yeah. And so, you know, to me that's where it's like. So if what they bought, if it doesn't do what we, what we wanted to do? Well, then what are we gonna do?

MATT

6:10 Yeah.

TROY

6:10 You know, you bought it and now it still doesn't do everything we, what we need. Well, what do we, do? You know, are we back to this? Are we gonna have to go ahead

and get a subscription service? Some type, you know, this does not do what we needed to do.

MATT

6:28 That's helpful context. That's helpful context. I'm glad you mentioned that I was not a software guy as of four years ago. So I didn't know any of this either, but I learned it real quick and having all these conversations. So there's two major pricing or licensing models in the software space. The older more antiquated kind of the dying model is the perpetual licensing and that is usually where you pay a lot upfront and, you own the software and it's stored on a server usually in house in your establishment or you can pay somebody for hosting.

--- Pricing ---

MATT

7:09 And then you'll pay, you know, smaller incremental like support or update, you know, in the next few years. And usually you get that licensing a lot of times it'll be for like five years and then you'll renew. But the bulk of your investment is in that first year and then it's pretty small in the next, you know, a few subsequent years... because those models are typically associated with server based software.

--- Access to information ---

MATT

7:37 You lose a lot of the real time, the real time transfer of data and visibility. It's not in the cloud. So a lot of times you have to log in like through a VPN or you can only use it in the office.

--- Accounting integrations ---

MATT

7:53 Whereas with cloud based software, which is the way the world is moving to that's more of the modern innovative stuff that leaves you open to integrate with other tools and applications. That stuff is cloud based. So you could do, you know, we have a lot of customers who are in their living room in their sweat pants dispatching, you know, 50 technicians, right?

--- Accounting integrations ends ---

MATT

8:16 And during code that was really big because they didn't have to be at their brick and mortar and their operation just kept on running. A lot of people who are used to the perpetual.

TROY

8:26 To a...

MATT

8:27 Licensing model are turned off by the recurring cost associated with a subscription model, but it's you get what you pay for because along with not having to worry about hosting, you don't have to worry about servers crashing. You don't have to worry as much about data security. You know, we're maintaining all of that stuff and you have a predictable investment each year. And then because it's cloud based, it's more modern and it just tends to be more feature Rich. You're gonna get a bigger ROI on that software.

--- *Paper process* ---

MATT

9:01 So, you know what we hear a lot of what's common in as it pertains to your roles. And what you guys do is there's often with server based software, there's a lot of syncing issues. It's usually cumbersome for the text to use and the information doesn't always make it back to the office or it makes it back, you know, days later.

--- *Accounting integrations* ---

MATT

9:22 So those are a lot of, the basic complaints that I hear about the server based software. It's it's dying technology. Basically. Does that help you understand that?

TROY

9:34 Yeah. And, and as may know more than this as when they purchased it, which has been a few years back, see that's the other problem. I'm sure once they moved to, it may already have advanced to, by the way, now this part of it is cloud based. You don't even need that yet. You know what I'm saying? It may have already moved that direction. I don't know because we haven't really sat down and looked at it yet.

MATT

10:01 And so, that does happen, it, what doesn't happen, is it, it's usually not server based software that magically transforms into cloud based. And you're somehow grandfathered into the pricing because you already own it. For example, Davis ware, server base that's what you guys are currently on, just came out with cloud based vision. So if you were to move to that, I'm guessing you would be moving to their recurring subscription model associated with that cloud based software. Same thing happened with, Sage, 100 Sage, 300 server based. They came out with a new intact which is like cataract. This is accounting software. And that's a subscription model. So it's not uncommon for software providers to move from server base to cloud base. But with that move, they're also moving to the pricing model as well. So.

TROY

10:49 Well.

MATT

10:50 Well, that sounds good. That's all really helpful context. What I will think of today as is really a first date.

--- Accounting integrations ends ---

MATT

11:00 You guys don't know what you don't know. So I'm gonna run through some highlights of service trade. I'm gonna, you know, give you a good understanding of what we do, how we help. And then my guesses will probably table this. I would think for the foreseeable future. I don't want to speak for you. But, if you guys really love what you see, take it to long, take it to the owner, see if there's an opportunity to push this into here. And now follow up with me. And, if the timing isn't right, you don't yet have the support and that's you can table this for a later time. So I just don't want to drop the ball if you guys are ready to do something, but I also don't want to be petite.

TROY

11:45 No, no. And, and we, I mean, we obviously don't want to waste your time, but at the same time, one of the problems that we all have, is we got to be able to say, well, we looked at this guy's product and here's what it does. And if you want us to do this, then that's what we're gonna have to have. So without seeing it well, we can't really, you know, actually flyers and stuff, and that's not good enough as the three of us going, hey, we watched it first and... yeah.

MATT

12:19 Yeah, you want a good control group, you don't know what you don't know, so you can't tell them that what they have is hot garbage. If you don't know what, maybe everything else is hot garbage. And that's as good as it gets. So I'm more than happy. I think that's time well spent, to give you guys a comparison of what modern cloud base can do versus what you might already be working with.

--- Purchase decision ---

TROY

12:38 So...

MATT

12:40 My goal for this is to keep it like a conversation. We got a small group. So, I trust you guys won't be shy with the questions comments. Please feel free to interrupt me as we go through this because I'm not looking to talk at you the whole time.

--- Purchase decision ends ---

TROY

12:54 Yeah, Richards here now, you probably saw him pop.

MATT

12:58 Hey, Richard. Nice to meet you. My name is Matt.

TROY

13:01 No, Richard. Yeah.

MATT

13:03 And Richard, you are coming supervisor over there?

TROY

13:06 Yes, yes.

MATT

13:08 Perfect. So, what I would like to know before we get things kicked off just to make sure I'm showing you guys the stuff that you care about is, you know, I've already heard a little bit from Troy about some of the things that you guys would be looking for.

--- Paper process ---

MATT

13:21 He mentioned... streamline dispatch system to reduce some of the chaos, particularly during your busy season, the ability to build faster. There's there's delays that sounds like they're inherent to the fact that you guys have some double data entry going over there. They submit those somehow. And then you have to re, enter them into a system before you can even start the billing process. And then the last one, he mentioned is making life easier for the technicians. So maybe you guys can expand on some of those or add some new ones. What are some of the headaches you're dealing with? What are some of the areas that you would love to see improved over there?

--- Paper process ends ---

TROY

14:03 Well, the main thing is a part of our deals to like when these guys see a job, and then when they get done with that job, they can't get another job or part, it's gonna show that it's all back toward and then be able to go back to it. Because now we can't there's no way to set it up or they can go backwards and look at what already done. So if you...

MATT

14:34 A job where there is a hold up for parts or maybe it's a two day job where they need to come back the following day. Are you saying you're not able to pull them off of that job to go take an emergency call and then they come back and revisit it?

TROY

14:46 We can pull them off and we do an emergency call. But I'm saying like say, when they get done with the job, you know, say, the go to the job and have that order. Okay? The way our screen is, you know, Joe it in there, but it's not. I just, we needed for something to pull that back up, you know, like say they say it's gonna be two weeks out. Okay? If we need to be able to look two weeks, come back and then needs to pop back up and mind to dispatch? Hey?

MATT

15:20 Come in?

TROY

15:20 And really get a hold of the technician, the call getting time. We're not getting one that, we get stuff all the time. It's months out, you know, at least say, hey, you know, this job at in, I don't show back up there's. Gonna be a way, that comes back up on the computer to show the dispatch to check. Just right now, the door.

--- *Accounting integrations* ---

TROY

15:48 So far are integrated. We have the data were and our technicians do not have access to it. So they're using a different software... to submit electronic work order. If it works. Some of them are still on paper work orders. When we track our work orders or calls, it's not tracked in day this ware.

--- *Paper process* ---

TROY

16:19 So it's tracked in a whole nother, it's a spreadsheet. It is tracking a spreadsheet. So that, that's why what Richard is saying, we don't know two weeks, three months out what is going on with the parks? Because we're looking in so many different places that we, things get lost in the shuffle.

MATT

16:46 And listen, guys, don't beat yourselves up for the judgment free zone. I talked to people just like you all the time and if you don't have the proper infrastructure, if you don't have a right to help you, it doesn't matter how good you guys are, right? Like things are slip through the cracks. No, no human is above that. So that's really good to know. And if I understand this correctly, you're using, I think job is a job for.

TROY

17:13 Jot form. Yeah, jot.

MATT

17:17 Job. So, job technicians, Davis were for the office and then you're using excel spreadsheets subtract calls and then you've got a separate accounting system that you don't know the name of.

TROY

17:28 Yeah, the counting is, you know, we, the counting.

TROY

17:32 Counting department is a whole different department. I do invoice through the service department, but they take my invoice and manually enter them into the main accounting system, which is dos. They are on dos. So.

TROY

17:56 We're way behind in an... scared to move.

TROY

18:02 So, we're a little bit lacking in the technology?

MATT

18:07 Yep. Okay. Well, that's also, I mean, as scary as it is, it's helpful to know, are you billing your customers out of Davis were, or are you creating the invoice out of David? Were sending it to the dos department? And then they're billing a customer?

--- Accounting integrations ends ---

TROY

18:25 No, it's getting build from day this war. So I do all of mine and then they're kind of on the back end... after I get it sent out, all of that, then, they take over and do their thing.

MATT

18:44 Okay. So are you able to track things like, you know, aging reports and customers who are overdue with their balances and stuff or is all that living in the system?

--- Accounting integrations ---

TROY

18:55 So I can track it somewhat. They didn't when they purchased it many years ago, they didn't purchase the full system, they just purchased in some pieces. So we don't have the full capabilities of what it was supposed to do. So I can do, I think I can do aging, but usually that comes from the main accounting department.

--- Accounting integrations ends ---

MATT

_{19:25} Well, and I'm not here to help with anything on the accounting side, but it's kind of helpful to know, you know, what you guys are working with and potentially what that communication needs to look like between you and department.

TROY

_{19:39} So they just, they take my paper invoices because I have to print them off for them. They'll take the paper and manually enter it into their system. So we, I mean, we, I'm not very concerned about them.

TROY

_{19:58} I'm...

TROY

_{19:58} Concerned about the service department?

TROY

_{20:01} Yeah, to be fair, I think the three of us, our attitude is if all they want is a piece of paper that says we had four hours of labor at this much money, we sold 200 dollars worth of parts and that's all they want. We want our part to be easy to hand that to them. And then whatever they do is on them internet, they've got an advocate factor and they figure it up. I don't know that's their problem, that would be, we just on our circle of we're trying to make our lives.

MATT

_{20:34} Yup. And rightfully, so, because I'll teach you something else about a lot of your industry. The first piece of software that they usually buy is an accounting system and it makes sense, right? It's a necessity. You got to be able to count the money, manage, the ledgers and whatnot, but that often tends to be kind of where they stop in terms of what they view as necessary technology investments and they think that is the most that's the center of their business.

--- Paper process ---

MATT

_{21:04} That's the most important part. But you're absolutely right? Whether they're using dos or an advocates or whatever it is to count up the money, that is nowhere near as important as the technology you use to feel.

TROY

_{21:16} Will the...

MATT

_{21:17} Actual revenue generating operations, making it easier on your technicians, making it easier for you guys to dispatch jobs to your technicians, to make sure that you're reducing windshield time, you're keeping their noses to the grindstone, you're

funneling back pull through pipeline from repairs that they're discovering out there that's all the stuff that makes the money.

--- *Customer engagement* ---

MATT

21:38 The accounting system just counts it, right? That's not driving anything. So you guys selfishly wanna make your lives easier. But from a business standpoint, that's the way to go anyway because that's how you're going to produce more money, drive more revenue. And as I'll show you, it's also the way that you can improve and strengthen your customer relationships as well. So the other thing, that we talked about Troy last week is... traditionally the old school mentality for commercial contractors is if you want to increase your profits until technology came along, the best way to do that is to higher technicians, which as, you know, we live in a skilled labor shortage and it's very hard to find them or cut your costs, find less expensive parts, you know, find ways to maybe order volume for pricing incentives, you know, looking at ways to reduce cost. But as you know, you can only drop your costs so low there at the end of the day, there is a floor for operating costs that you just have to have. Whereas the ceiling for how much revenue you can drive within your business is almost unlimited. And one of the best ways to raise that ceiling on the revenue you can generate is through something like technology because everybody is touching it. It is supporting everybody's ability to move this information, quickly deliver the service Bill out your customers. So that's how you can easily generate more revenue with that one investment with the resources you already currently have with the people that you already have in your employee. Does that make sense?

--- *Purchase decision* ---

TROY

23:17 Absolutely.

MATT

23:19 So that's what we're here to do. And, and when you look at this like we also talked about to, I don't want you to see a flashy shiny new toy. I don't want this to look like bells and whistles, and isn't that indeed, I'm gonna be asking you guys questions from an ROI standpoint, where are you seeing the advantages?

--- *Purchase decision ends* ---

MATT

23:35 You know, how much time will this save you? How much more money will this generate? Because at the end of the day, that's why customers choose service rate is because it makes them that much more money. It more than pays for itself. And really that's how I want you guys to be presenting it to on and I forget the owner's name. Is it?

--- *Purchase decision* ---

TROY

23:52 Go, Joe.

MATT

23:55 Joe and whoever else, the stakeholders are. All right. I feel like that was long winded. Thanks for bearing with me. Are there any other pains or headaches that you guys want to get off your chest in terms of, you know, areas of improvement, you talked a little bit about the billing speed, how you'd like to see that faster.

--- Invoicing ---

MATT

24:14 I think you said when things really pop off over there, Troy, it takes as much as two weeks to get bills out, what's the average for you guys, when a services completed to, when the customer receives an invoice.

TROY

24:28 It can be about a month.

MATT

24:32 Okay.

TROY

24:33 Yeah. We, it really depends, you know, if there's vendor cost involved, we typically wait until we receive the invoice from the vendor, so we can invoice.

--- Invoicing ends ---

TROY

24:49 So, sometimes it's about a month. Sometimes it's sooner depending on, you know, if there's no materials, it could be about a week.

MATT

25:03 Okay. Soon as a week, as long as a month, yes.

MATT

25:11 Okay. Yeah. And the whole vendor thing, I mean, that's something that unfortunately is out of your control.

--- Paper process ---

MATT

25:17 They can take, their sweet time with that. Sometimes... what about technicians? I know some of them are on paper, is that because they just couldn't pull off, the job form?

TROY

25:28 No, it's the job form is, you know, for lack of a better word, it's when we went to that, the former service manager, he went out because, you know, code would happen and everybody was like no more paper. You know, we don't want paper tickets. People didn't want to sign your ticket. They, you know, they don't want any of that. And he found this, you know, it's online and you build your own work order, you go in and it's got a template you create, you know, the, you know, we, the materials you enter the time the customer, the problem that we ran into and they've never confess to it is, I think they update it and every time they do, there's some type of glitch between it and the phone.

--- Access to information ---

TROY

26:16 And so, right now, you know, we've got a couple of guys that have, I think they've got an iPhone, I don't know, 12. And then we've got some newer iphones. Well, the guys with the 12, they can't get some of the stuff on the stupid apple and no matter what I've...

--- Paper process ---

TROY

26:32 Done.

TROY

26:32 It will not fix it. You know, we've deleted it. We've updated it. You know, the course, their standard answer is, well, you do all this when we do all the, still the work and it got to the point where it's like, well, you know, what? It's easier for you just to take a paper ticket now because I've wasted two hours trying to fix something that's obviously, I'll fix till we buy you a new phone.

TROY

26:57 That's...

TROY

26:57 Even it, I don't know, you know, because they're I don't know, you think they're over seas. I'm not sure where they're located at.

MATT

27:05 Well, I phoned 12 isn't that old so that they can blame the device at all. And it's pretty sad when reverting back to paper, feels like an upgrade.

--- Paper process ends ---

TROY

27:15 Yeah.

MATT

27:17 Yeah. Well, that kinda goes back to what I was telling, you know, I think you guys know this. I see all time in your business. You get what you pay for, right? Good is not cheap and cheap is not good. You know? So it wouldn't matter if jot form is free if it's that unreliable.

--- *Access to information* ---

TROY

27:31 How?

MATT

27:32 Is helping moving the needle for you guys? Okay. Well, that's really good. That's helpful to know because what I'm gonna be showing you here today is I've got a few different views. I'm gonna be showing you the office view that's where we're going to start out. We're gonna go out to the field. I'm gonna show, you know, what the technician sees from the mobile app. And then I am gonna be sprinkling in some examples of the customer view, you know, what your customers would see if you guys were corresponding through service rate with them. So this is a pretty good list like I said, is like a conversation.

--- *Access to information ends* ---

MATT

28:07 We'll continue to build this out as we go. I'm gonna go ahead and share my screen here. Let me know. And when you all see it, okay, see the technician playing with the hoses? Yeah?

TROY

28:18 Yeah.

MATT

28:24 So I'm gonna make this quick. I don't wanna do death by powerpoint, but I think it's helpful to have some background on service trade. So as I've mentioned, we were designed specifically for commercial service contractors. We work with over it's. Actually now over 1,300 commercial service contractors across the United States and Canada, some that you might recognize as luck and Bill streets, mechanical. There's be line heating and air, fire, troll in life, safety contractors out there. And basically we were designed to help you guys be more valuable to your customers and in turn grow your revenue. So here's some of, our stats here. So as I mentioned also there's currently a 40 percent shortage of skilled labor in your workforce which I know you guys are feeling all of our customers are feeling. And the bad news is that gap is actually widening by about eight percent every year as the older tech retire and fewer young bucks are entering the trades. So that's not going anywhere. And that's why your focus should be to optimize your constrained resource, which is your technicians. That means getting more out of the resources. You already currently have. One of the best ways to do that is by investing in good service management technology. So service trade helps our customers do make the most of those

constrained resources by helping you control costs, which boils down to streamlining your service and project operations and setting your technicians up for success.

--- Customer engagement ---

MATT

30:09 And then we help you grow quality revenue by helping you sell more service agreements and win more projects, and then create a service experience that grows profitable customer loyalty. Because as you guys probably know, not all customers are created equal. Some of them are Pia who don't pay their bills on time. They shop around on your price quotes and stuff. So service trade is about getting to a point where you can fire off the bottom 10 percent of your customers and you can trade up your customer portfolio by selling, and winning the premium customers in your market. So starting with improving your service and project operations, a lot of this is the stuff that we just talked about. And we're gonna focus a lot on today. Simply put by organizing all your customer data into one centralized location instead of having it scattered across excel data swear jot form e-mail where wherever else you may have it. We're again, we're simply going to allow you to do more with the resources you have increased visibility, increase communication, keep everybody on the same page. The big thing here and we're going to spend a lot of time on this is setting your technicians up for success. Your goal ought to be to reduce as much administrative burden on the technician as possible by providing them the clearest job information that's possible. Making it easy for them to see equipment history and specifications and even making it easy for them to take pictures, add videos, audio memos, all going into the cloud so that they're not having to text or e-mail this stuff to you but driving your technician productivity, is one of the fastest way to grow your revenue.

--- Customer engagement ends ---

MATT

31:59 And then we're going to help you sell more service agreements and win more projects. So this is actually referring to something that we won't cover today. But service trade has a mechanical specific CRM called Northboundary, and that is very good for tracking, you know, sales pipeline, forecasting, tracking sales activity.

--- Customer engagement ---

MATT

32:19 But probably it's strongest proposition is making it easy for you guys to quickly configure new PM contracts, making it really easy for your customers to sign. So you can win more business, but also get them under contract so that you have a recurring source of revenue and a recurring source of additional pull-through repair opportunities. And that piece right there will probably resonate more with Troy than with Richard just because you don't see as many PM agreement opportunities on the plumbing side as you do on the side.

MATT

33:01 And then lastly growing profitable customer loyalty. I like to refer to this as becoming the Amazon prime of your industry, right? Being the easiest company in

town to do business with, making it very easy for customers to see the value that your technicians are delivering out there on their equipment. So again, that's providing them with pictures videos, whether it's an online customer portal where they can log right in through your website and look up service history, request service, pay their invoices online. This is really about, you know, making your customer base stick here, building their trust. But this is also the stuff that customers talk about, right? It helps you stand out from, your competition. So it's a great way to attract new customers in the process. Any questions about any of that stuff that I just showed you?

--- Customer engagement ends ---

TROY

33:56 No.

MATT

33:58 Okay, perfect. So again, we're gonna start in the office and when the office signs in, they're gonna land at what we call the service dashboard. So now I want you to think of the service dashboard as home base. It's basically a 30,000 foot overview of the different stages of your workflow. So for example, here at the top here, we've got the daily schedule. This is not to be confused with the dispatch board. We got one of those and I'll show you that, but this is just plain and simply a list of the jobs going on today, who's doing, what, who's doing? Where... down below that we have over to jobs without appointments. So this is the stuff that slipped through the cracks on us that we need to make a priority and get that scheduled, a sap right underneath that we have jobs without appointments due in the next two weeks. So this is the stuff that's about to slip through the cracks on us if we're not on top of it. And then we have pass jobs to be marked complete. So these are all jobs where the technician has completed the work order. It just now goes into this review bucket in real time for a service manager to look it over before passing on to billing. And then lastly, we have completed jobs to be invoiced. So you guys can run a bunch of different reports on this information using a plethra of different filters so you can quickly drill down into, your database and find what you're looking for. But the whole point of this assembly line formatted dashboard is to provide you with that immediate and convenient visibility as soon as you log in. So first thing when you get to the office, you can hit the ground running, you know, exactly what your priorities are without having to go digging for. You guys. Still with me... you guys have any questions about the information that's on the dashboard? How that is laid out?

TROY

35:57 No, I don't looks good.

TROY

35:59 Yeah, it.

TROY

36:02 Everything is Blake. I can get that.

MATT

36:08 What was that? Sorry, I missed that one?

TROY

36:10 I kinda like the way it is set up on how you got it set up a, that's what we need every we like to say.

MATT

36:18 Once you come.

TROY

36:18 In, in the morning, you can see where everybody's at that. You already dispatched the night before. Like right now our guys get off at four 30, the call or timing or the caller time in, we look for the next day. We got 30 minutes to dispatch 26. So, you know, the so working that's where our distract gets hung up a lot of time. He's getting ready to switch the board. Well, the guy calling in, he's you're taking phone calls. He shouldn't be taking phone should be screen. You can take the next to tomorrow. Here you go. It's already there. That's where our dispatch get over. Just they're calling you on the phone and say, yeah, I'm done or, you know, I might have to go back tomorrow. Why are you going back tomorrow? You just, you know, go back to jobs. It should be done. I... think we're a lot of that like the dispatcher.

MATT

37:31 Well, I think you guys are really gonna like, the dispatch board itself. This is kinda just getting warmed up in terms of increasing visibility of what's outstanding, what needs review, what's overdue. So I'm glad to hear that this is resonating with you guys. I kinda thought of you when you were when you were describing how... jobs are being managed in an excel spreadsheet and if something is pushed out a few weeks or a month, you just completely lose visibility.

--- *Paper process* ---

MATT

37:58 Hopefully, you get back to it eventually. But how it's really hard for you to stay on top of what slip through the cracks. So I'm glad this resonates with you.

--- *Recurring maintenance* ---

MATT

38:08 Okay? So to give you a better idea of where all this information is coming from. Really helps to understand our data model. So as I mentioned, because we are designed specifically for commercial service contractors, we know how important it is for you guys to distinguish between that Bill to and ship to address, right? So a lot of your customers might be a parent company, corporate headquarter that's your Bill to address. But underneath them, you're responsible for servicing several different physical locations or service site. Okay, perfect. So here, I can see that each physical location has its own designated page and this is where all the information for that one location is going to live. So for starters, this is where we're going to be able to see things like services now for you guys, Troy, I don't think I ever got a clear number as

to a rough percentage of your customer base that's under maintenance contract, but I know it was relatively low.

<center>*--- Pricing ---*</center>

<center>TROY</center>

39:14 Yeah, it's...

<center>TROY</center>

39:15 I don't...

<center>TROY</center>

39:16 PMS, would you say we have... roughly?

<center>TROY</center>

39:21 Percentage why?

<center>TROY</center>

39:23 List? Not too.

<center>TROY</center>

39:26 I don't know. I would say it's 25 percent.

<center>TROY</center>

39:34 Yeah. I would say so if I was guessing, that our overall customers are 25 percent of them have a maintenance agreement.

<center>MATT</center>

39:42 Okay.

<center>*--- Pricing ends ---*</center>

<center>MATT</center>

39:43 Well... I beat this horse pretty good on our last call, Troy. So I won't do it too hard this time. But, if there's one thing you guys take away from any of this, it is prioritize the maintenance agreements. There are so many profitable and beneficial reasons to do that. One, it helps reduce the chaos because when you're proactively going out and working on their equipment, you're preventing these emergency calls and therefore Harrison or is no longer associated with nightmares and headaches and get out here. We need you yesterday. Maintenance contracts are recurring revenue which actually increases the valuation of your business as a whole.

<center>*--- Customer engagement ---*</center>

MATT

40:28 Maybe not something you guys care about but something your owners absolutely should care about. And then probably the third biggest one is it opens the door for that pull-through work. So when you guys are routinely going one out there working on their equipment, it is easy pickings for your technicians to identify, pull through opportunities that you can quote out when that work and schedule it on your own time because it's not an emergency yet, right?

--- Recurring maintenance ---

MATT

40:51 It's not a headache. So highly recommend prioritizing those. And so service trade is designed to help you track and manage those recurring services. So here under the services section, I see a few one off services. The difference between these one offs and these recurring services is once these one offs are completed by the technician, they're actually gonna disappear from this service section. They're gonna go into your work order history. Whereas these recurring services, I want you to think of these as a set and forget. So when you win that maintenance contract, you can come in here. You can type up a detailed scope of work. You can designate how often it recurs estimated price, estimated duration. You can assign preferred technicians. You can assign it to a piece of equipment or a group of equipment. And you can even determine what, your scheduling window is, whether that's a particular day or just a general month that you have to be out there. Now. The idea here is it's a set and forget. So once I set this up, it's gonna be on a rolling clock. And that means service trade is gonna make it easy for me to stay on top of when these are due. But then each time that technician completes this service, it's gonna automatically update the next time that it's due. So you guys aren't having to track this in an excel spreadsheet. You're not having to create sticky notes or future dummy jobs in order to stay on top of this stuff. It's got you on a rolling clock so that you're never missing an opportunity to deliver this service. You're not playing defense and it's not sneaking up on you. Does that make sense how maintenance agreements are tracked through your?

TROY

42:33 Yeah, it can help us. I mean, here on the side, you know, come a big set. So every year they got us. So this is gonna be like be setting every October, you know, roll up, come up in out and then it's just reload it again.

--- Type of work ---

TROY

42:53 So that's, I mean, we missed a bunch uses on just because they don't go back to it. We don't have rolling over every year. So.

MATT

43:11 You, I'm glad you mentioned that Richard, because a lot of times when I think plumbing, I think more break fix small projects, we don't usually, you know, associate a lot of recurring services with that, but that's an excellent example. Excellent example.

TROY

43:25 Yeah, I, you know, there's still, it's probably like maybe 10 percent of what's out there, but it's still, it's more, you're gonna have a go out there. You go go on. You're already out there year. So it, and... more you're out there, you're gonna break down.

MATT

44:03 Absolutely, right. And, and here's the thing, not only is that good news for you guys that's good news for your customers?

TROY

44:10 Right.

MATT

44:11 One of the best things that can happen for your customers is nothing, right? Nothing never breaks. Nothing ever happens. They never have to pick up the phone that's the best customer service right there. So when you got eyes on it and you got multiple touch points with their pieces of equipment, you're averting costly business interruptions for them.

--- Recurring maintenance ---

MATT

44:32 And that is something that they'll pay a premium for. So the other thing that these recurring services function as is they act as a sort of stamp or blueprint for all future work orders. What I mean by that is we have all this detailed Rich information living on these services. So that means once a month, you guys can run a report and forecast all of your upcoming services. And with a click of a button, you can create hundreds of detailed work orders that are locked and loaded with all this Rich information. So instead of you guys having to pull up a blank template and type a bunch of stuff in there and prepare this doc for your technician.

--- Recurring maintenance ends ---

MATT

45:19 Every time you sign a job click of a button, you've created hundreds of jobs that have everything they need. And now you're just dispatching it out to the technician.

TROY

45:28 Yeah, that would be great for our dispatcher... you know, because he is starting from scratch every time he sends out one of those calls.

--- Paper process ---

TROY

45:40 Yeah.

MATT

45:41 Absolutely. How much time? And this is just rough. I'm not asking for actual numbers here, but best estimate about how much time a day is your dispatcher spending just preparing work orders with all the details for your text?

TROY

45:57 Well... I can tell you. So right now, we did bring in.

--- Paper process ends ---

TROY

46:06 We, we actually have like, I guess you'd say two dispatchers. So we have our name's Molly, she actually talks to the customer first and takes the call information and creates the call, Joe. And it's funny. You said that in order for him to send a call to a technician, takes him about a minute and 45 seconds, it's six steps for him to send a call right now because he's doing two systems and, you know, I thought we joked around it that said you get sober in 12 steps and it, that's terrible.

--- Paper process ---

TROY

46:47 Yeah, it takes him. So if you figured let's just round up and say it takes you two minutes, if he gets interrupted, you've got 20 guys were 40 minutes just to send the end of the day calls.

TROY

47:01 That's just at the end of the... day.

TROY

47:05 He's not. Yeah. So, it's a time consuming process. Yeah.

--- Paper process ends ---

MATT

47:12 So that's at the end of the day, preparing calls for the following day.

TROY

47:17 Yeah. If, if he were to do that because he normally, he said he, you know, it depends on what the work schedule is. It could be anywhere from 12 to 20 guys that are getting scheduled the next day based on somebody's going back to another job. So, yeah, it could be, you know, anywhere from, you know, 20 to 40 minutes. If he's not interrupt and to do.

MATT

47:40 That, wow. Okay. Well, on that note, then let me show you something real quick. I just described what I was talking about. I'd love for you guys to see it in actual action here.

--- *Recurring maintenance* ---

MATT

47:52 This is that service opportunities report that I was referring to. So here, this is where I can easily select my date range. So maybe I wanna see everything that's due in the next two months. Maybe I wanna see it across all of my divisions and I want all of my services if I want, I can get super detailed here and I can say, I just wanna look at H vac and maybe I just wanna look at... computer's going slow here... commercial plumbing, right? I can be specific about the services looking for. And when I run this report, service trade is combing through all of my customer location pages and it's extracting me a list of all the services that are due within the next two months that meet my search criteria.

--- *Assets* ---

MATT

48:43 So here, again, instead of typing up all the details, the customer information, the asset information, I can grab all of these jobs, select my job type. And with a click of a button, it'll bulk, create in this case, 52 jobs. But it could be hundreds of jobs that now don't need any preparation.

--- *Assets ends* ---

MATT

49:03 Now, all I have to do is look where the technician in who's available and I can drag and drop these jobs down onto, their calendars and it automatically syncs over their device. And I have everything they need to go out and perform the work.

TROY

49:19 He would love it.

--- *Paper process* ---

MATT

49:23 So again, my goal is not to show you a Ferrari just so you can flash the key, just bells and whistles, but how much time savings are we talking about for poor Joey?

TROY

49:36 A lot a lot.

TROY

49:38 An hour, two hours.

TROY

49:42 At least, yeah.

TROY

49:45 Like you said, you know, even if you had to like, so on the, he was downloading that he could just write back up, find that technician that's yeah, it's gonna help with, but.

--- Paper process ends ---

MATT

49:59 So, I'm glad to hear that... because you said something else, that got my attention. This is something we're familiar with is what we are the phone do because you mentioned that Joey's job doesn't just stop at preparing these jobs or maybe it's also the dispatcher, but they're having to make calls out to the technician interrupt their work to figure out if they were finished with a call or not, or get details on where they're at, right?

--- Assets ---

MATT

50:29 So, these calls are happening all day long. Are all of you guys fielding calls like that? Where, hey, what was done on this piece of equipment last time? Who was here? Last time? What piece of equipment am I working on? Are you, are you all doing calls like that?

--- Paper process ---

TROY

50:43 Every day?

TROY

50:45 Yeah. In addition to how many hours was I on this call?

TROY

50:51 No problem.

MATT

50:53 The have no way of looking at.

TROY

50:54 It, right?

MATT

50:57 So that's something that we're going to be talking about throughout today's. Little presentation. Is the phone rodeo because it is one of the biggest killers to efficiency. So, and again, I'm all about the numbers for each of you. We'll say on average about how many of these kinds of calls are you guys fielding in an average day?

TROY

51:16 For me, not very many. Because I told the guys I'm not doing... I told them that, they got to figure out themselves, they know their hours, they've got to figure it out. So now instead of calling me, they call Joey because Joey didn't tell them.

--- Paper process ends ---

TROY

51:34 No, he did. Yeah, we're in this for lack of a better word. When I started the job, we've slowly. Their grace period is over.

MATT

51:48 It's...

TROY

51:48 You know, we're not gonna hold their hand anymore on some of this stuff, but I probably anywhere, you know, depending on what the problem is, if it's outside of just, you know, normal what I would call needed help, it can be anywhere from an hour to two hours a day of senseless nonsense. They're calling about, you know, and, you know, that's say it's two hours out of the day, at least only six hours to deal with the things that really need to be dealt with. So probably he gets way more calls, can't look at one of their screens as far as screening see what the jobs are, and I see Joe and say, hey on the board... scheduled and it's really rough for me. I can't, I can look at their job on and they turn to me so it comes off my computer, but I know they got done well. They sign on that job. One, in my opinion, they should be assigned the job, right? TAM, you know, and that's where Joey, I mean, sometimes it's not his fault but, you know, he might be on the phone. He might be dispatching, doing something else where it might be 10 to 20 30 minutes before I get this next call. So, you know, he can be talking on the phone and running the computer, you know, and then drop it so that's in case there's some days. I mean, I have to give guys, you know, an hour shop time because they've been waiting on waiting for a job. And then, you know, that's going out, not coming in, Joe.

MATT

53:51 And so, so that's the thing to keep in mind is when you're looking at new software, it's very easy to quantify the cost of that new software.

--- Pricing ---

MATT

54:00 It's wrapped up in a neat little bow. You see that number. It's a far more difficult thing to quantify what you're paying for your current software in all this overhead and all the double data entry and all the phone calls it takes, to make it work, right? So if we assume something super conservative, let's say your techs are paid 15 dollars an hour. Let's say you Troy and you, Joe, you're paid 15 dollars an hour. We'll call that 30 dollars an hour. We'll make that 60 because it's both you making calls, right? We multiply that by we'll say two hours a day. Actually, it would be yep, two hours a day. And then we multiply that by.

TROY

54:42 Hi.

TROY

54:46 I...

MATT

54:47 For working days, and then by 52, it's hard to believe that stuff adds up, right? Due to a lack of visibility. You're talking about over 30,000 dollars and overhead just, in nonsense phone calls because there's missing information that's something that your owners aren't gonna think about.

--- Paper process ---

MATT

55:05 They're not realizing as far as they know, this is how we've always done it and what's wrong with this process. But how else could you guys be spending that time, right?

TROY

55:14 Yes.

MATT

55:16 How many more jobs could your technicians get to if they weren't having to constantly call in for missing information?

--- Assets ---

TROY

55:21 Right. Yeah.

MATT

55:24 Awesome. Again, I appreciate you guys humoring me through that activity. Like I said, my goal is to crunch the numbers on this and show you how this is really about revenue. So, in addition to tracking your services on the location page, this is also where we track individual pieces of equipment, right? So this can be, I mean, that, so this can be, you know, H back units, you know, ice machine, walk in coolers,

walk in freezers, and we can track the individual make model, serial number, belt size, refrigerant type belt quantity, so on and so forth. But I can drill down even deeper and this one piece of equipment at this customer location has its own designated page where I can see all of the services associated with that one piece of equipment once my page loads.

--- Access to information ---

TROY

56:23 So, I think you're sharing your phone screen and it's covering the screen hard.

MATT

56:30 My...

TROY

56:31 Your calculator pop up on your side.

MATT

56:37 What are you seeing now? Are you seeing me switch back and forth?

TROY

56:40 Yeah, yeah. Yeah. Now we see the kroger urban.

TROY

56:44 Yeah.

MATT

56:46 But that's on my.

TROY

56:48 Well, it's showy. So.

--- Access to information ends ---

TROY

56:54 It'll pop up and then go away and then pop up and.

MATT

56:57 Wear, yeah. Okay. I've never had that happen before.

TROY

57:01 Thought you were just deleting it every time?

MATT

57:06 No. Are you seeing? Are you seeing the office view?

TROY

57:10 Well, we see that, and then your phone will pop on and go back away like just that one away. Now, you part?

--- *Access to information* ---

TROY

57:18 Now, like now, there's a quarter of a po.

MATT

57:24 That is so weird. I've literally never had that happen before. That is a screen mirroring thing. And unfortunately, it's stealing my thunder. Are you guys, and that's still shown on the phone? Okay? I'll stop mirroring the phone for now and I'll just pull that up when we're ready because it's acting up on me. You guys are not seeing a phone now, right?

--- *Assets* ---

TROY

57:47 No, that's good.

MATT

57:48 Okay. Thank you for letting me know. That is bizarre. I've never run into that before. Okay?

TROY

57:54 Yeah.

MATT

57:56 We thought you saw...

TROY

57:57 It too, and that's why I kept going on.

MATT

58:01 No, that was not intentional. So again, thank you. So, so we've got this, we've drilled down in and now we're looking at an individual piece of equipment so we can see services associated with this one unit at this one location. I can see any work order ever performed on this one unit at this one location. So I see all the detailed service history and details. I can see any deficiencies or repair opportunities we've ever discovered on this one piece of equipment. I can see any repair quotes we've

ever sent out for it. I can also see things like attachment. So if I wanted to add a spec sheet or a blueprint or some sort of wiring diagram, I can add that on there. The technician is gonna be able to access this from the field as well from their mobile app. And then of course, if there's any comments that I want to put on there about the unit, like maybe where it's located, or if there's like a, you know, an access code or something like that.

--- Customer engagement ---

MATT

59:03 Now, we're gonna talk a little bit more about this. We'll go out to the mobile app because this tends to be huge for all of our customers who are working on some form of complex systems, you might have 100 units at a given customer site. And so having your technicians equipped with this detailed information can improve the quality and the speed of the service out there. It could also go a long way to reduce that phone ROI.

--- Assets ---

MATT

59:30 So the rest of the location pages kind of the macro view to the micro view I just showed you. So instead of just the work orders for one piece of equipment, I'm looking at all of the work orders for the entire location. I'm looking at all of the deficiencies across the entire location. Same thing with the quotes. And then I can even have location specific comments. So like if the gate code is four six three five seven or the roof access requires a 15 foot ladder, I don't have to remember to put that on every ticket that goes out to a technician because these helpful little breadcrumbs are actually gonna populate on every work order.

--- Assets ends ---

MATT

1:00:07 They get dispatched thoughts on this. Is this the kind of stuff that you guys feel some of your phone calls for? Yeah?

TROY

1:00:15 Yeah, a lot. Did I need the latter doing?

TROY

1:00:21 Yeah. And, and I like that in the account as it is right now, Joe has to put it in the description of the work and that description of the work gets sent to the customer.

--- Assets ---

TROY

1:00:38 So I don't wanna send a gate code in when I'm mailing something in case it goes somewhere else that it's suppose to. So I have to go in and delete all that information just, you know, for safety sake of the customer... and where they're just being in one location where the text can access, it would be great.

--- Assets ends ---

MATT

1:01:07 Love that because I think you brought up a good point about the ladder. This is not only potentially saving a phone call, this is potentially saving a trip back to, the office to pick up a ladder, right? More of that time that's more jobs that they're not gonna get to because of these little hiccups. Savings make a pile. And that 30,000 we just talked about just went up with the lack of visibility and have to do callbacks. Well, excellent. Any questions you guys have about the location page or how that information is organized?

TROY

1:01:42 No. Well, no.

MATT

1:01:46 Awesome. Okay. Let's get into some fun stuff. I have set us up a job and in case you guys haven't caught on and service trade, we call work orders jobs. A lot of times job is associated with a Construction project. We understand if we could change it, we would, but this is what the founders started with.

--- Recurring maintenance ---

MATT

1:02:04 So you'll hear me use job and work order interchangeably. A job in service trade can be a preventative maintenance. It can be a service call. It can be a retro fit, you know, it can be a bunch of different things. And I've set us up a preventative maintenance here at the kroger and Irving and I've got three different services on this call.

--- Assets ---

MATT

1:02:24 I've got a quarterly PM on a walk in cooler, a walk in freezer, and a group of five rooftop units. We got our best technician on the job. And here, I can see the appointment details, right? So I know when this technician is expected to go out, the other thing that you can do that I skip over is on that location page where you set up those services, like your recurring services.

--- Quote templates ---

MATT

1:02:47 If I want, I can associate certain job items with those services. So, for example, if I know every time I'm going out to do this PM on these five units, it's gonna take this many filters of this size, this many belts of this size, I can pre associate those items so that when I bulk create hundreds of tickets, it comes complete with all the different items the technician is expected to use out there. Now, if the technician wants, they can edit those items from the field, they can add more items. But, I, this is just basically a spring board giving you a head start. So it's fewer things for them to remember, fewer clicks, fewer steps, just less noise for them to have to worry about.

--- Access to information ---

MATT

1:03:28 So we're actually going to be coming back to this work order once we go do some stuff in the field. But before I move on, are there any questions about the office view of a job AKA work order?

TROY

1:03:41 No, I.

MATT

1:03:43 Pretty straightforward. Okay. All right. So now we'll pop out to the field. And now I wanna share my device. Hopefully it doesn't act up on me.

MATT

1:04:11 No.

MATT

1:04:19 Okay. Now you guys are seeing just the phone... no funny business going on. So here, what we're looking at is the service, very mobile app and this is compatible with android, iOS, can be a smart phone tablet. And when the technician logs in, they're gonna see they're working a few different ways.

--- Dispatch ---

MATT

1:04:42 So here, we have their scheduled jobs and we can look at just the work for today. I kept it simple. I just got this one job here. If we want the technician to be able to look out end of the week or month, they can go ahead and toggle that off and see all of their upcoming work so they can prepare for it. They can have any jobs that have been assigned to them but haven't necessarily been scheduled yet. Maybe you consider this like filler work. If they're in the area, they can knock these out as they see fit. And then of course, they're going to be able to see any of their completed jobs, right?

--- Tech On-site ---

MATT

1:05:17 So no more calling back into the office to figure out how many hours they had on a job. They're always going to be able to look back, and retrace their steps. So here's this job, we were just looking at the office. I'm gonna open it up. And now when I do, I'm presented with eight different tiles of information about the location, the equipment I'm out there to work on the services that need to be done. But before we get into these down here at the bottom, you'll notice, we have some clock events. There's a few different ones to choose from. One of the more popular ones is the in route. And this is where when the technician is leaving their house or leaving the office, maybe the previous job, they can clock in route and service trade will keep track of all of their drive time.

--- Customer engagement ---

MATT

1:06:00 Now, going back to that online customer engagement, this is also where the technician has the ability to notify their customer. I had to make up your last name because I didn't know what they were, so.

TROY

1:06:16 It's cost a month.

MATT

1:06:18 Okay. I'll take it. So now I just sent you guys a little friendly in route notification. So if you guys have access to your e-mail if it's on your phones, feel free to pull that up. We'll get some audience participation going on. But basically here, this is an opportunity for you guys to provide some value to your customers. You might feel some phone calls where they're like, hey, when is our technicians supposed to be here? I thought we had this service going on today, right? But it's also what we call a marketing impression. It's the same kind of stuff that Uber Amazon door dash dominos is doing to make their branding stickier to their customer, right? Never letting them forget who's delivering that great service. So this is an excellent way to stand out from your competition, but doing it in a way that's not spammy, or obnoxious, right? Because you're providing value. This is something your customers care about. This is a new trick for a lot of old school contractors would love to hear your thoughts, and what your customers would think of this and how it would help differentiate you guys from the competition.

--- Customer engagement ends ---

TROY

1:07:24 I personally like it. So I like technology. So for me personally, anytime I can get something like this, I'm all about it... I think our younger customer base would appreciate it. Some of our older ones that have been with us for many years. They would probably be like, I don't know what this is... but, I think it would be beneficial to customers.

MATT

1:08:02 Yeah.

TROY

1:08:02 Especially our commercial customers. You know, the property managers can start expecting us. I think it would be a good tool.

TROY

1:08:15 Yeah, definitely, we have a handful that definitely wouldn't give a hoot about it for sure. But I think overall, I think most people have moved towards that whole, I wanna know when my package is, you know, just like Amazon now, you know, I got the one where it shows you a little truck how far it is from your house now... four stops.

--- *Customer engagement* ---

MATT

1:08:41 That's that's a great point. There's gonna be those old dogs. You can't teach new tricks. I think everybody's got a handful of those customers, and you guys hit the nail on the head. You don't have to win them all if you get super sticky for even a third of your customer base by doing this kind of online engagement, those are customers. You don't have to worry about losing, you know, and it's very easy for the tech to do as part of, their normal every day job. Is that small little difference? That makes a difference, right? And, it pairs well with some of the other customer engagement that I'm gonna be showing you guys. Richard, did you receive that on your phone? Were you able to pull that?

--- *Customer engagement ends* ---

TROY

1:09:17 I did.

TROY

1:09:24 He's got somebody bothering him about a question?

MATT

1:09:28 More radio.

TROY

1:09:34 I can.

TROY

1:09:36 The time for, yeah.

TROY

1:09:40 Yeah, that's pretty cool. Yeah.

TROY

1:09:45 That's the biggest thing like you say, you know?

MATT

1:09:48 One.

TROY

1:09:50 Sends it to them. They're gonna see it there when you start in, it's. Gonna give you the time to get there.

MATT

1:10:01 That's like a...

TROY

1:10:02 Lot of steps, you know, say we have to wait or 20 minutes to get the call. Okay? Now, we're gonna take the 30 minutes to get there.

MATT

1:10:12 I mean, you're almost saying...

TROY

1:10:13 In an hour to get to your next call, so that... so some of the customers you, have, they actually... like, for example, has this weeded out guys who've been probably not gonna say riding the clock but, you know, if you got a tech who's you know, that guy is not where he's supposed to be.

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

TROY

1:10:41 Has this weeded some of that out? Or it's like, hey, we're gonna notify the customer you're in route and the customers calling back in, hey, this still is, is been an hour you met?

MATT

1:10:56 Nope. So it doubles as a few different things wanted. Again, it's great online customer engagement. But two, anytime a technician clocks in or out, it takes a GPS snapshot of where they clocked in or out. So, if they clock in 50 Miles from the service location, and then they clock in on the job, 50 Miles from the service location.

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

MATT

1:11:17 Now, it's probably time for a conversation and I'll show you back in the office, what that looks like. It actually pops up a little flag like, hey, this guy was nowhere near where he was supposed to be, launch to dig into this a little bit.

TROY

1:11:29 So that notification came via e-mail to Richard. Is there a way for the customer to get a text message or e-mail...

MATT

1:11:40 So that's probably the number one question I get when I show this to the extent that I would be surprised if, it didn't one day come available via text. I think back in the day they took a vote, hey, mister customer, you know, text or e-mail and I think the thought was kinda capture the best of both worlds with everybody kinda having their e-mail on their phone. So now you can catch them in front of their computer or if they're on their phone. So, I think that was a thought behind it, but we're constantly changing and improving. So I wouldn't be surprised if it didn't come down the road on the text. Okay. Yeah. Well, excellent feedback, guys.

--- Tech On-site ---

MATT

1:12:15 I really appreciate that. Like I said, it's a new trick but I'm glad you see how this would help set you apart and it help make you stick here to your customer base. So, let's say that I've arrived here on site. I'm gonna clock out in route service trade is gonna say, hey, you ready to get to work? We sure are right? So now, I'm clocked in on this job. It's keeping track of all of my time at this location, right? So let's get back to these tiles. A lot of these are self explanatory. So I'm not gonna go through all of them. But first and foremost, here under services, I can see the different tasks I'm out here to complete.

--- Assets ---

MATT

1:12:49 I got that quarterly PM on the group of rooftop units, one on the walking cooler, and the walk in freezer under equipment. This is where I can see the three pieces of equipment that I'm concerned with for this visit, right? We don't want to bombard technicians with more information than they need. However I might be out on site and a customer pulled me aside and said, hey, while I got you here, can you also look at this ice machine? I still have access to the other pieces of equipment on site.

TROY

1:13:20 Okay. Let me.

MATT

1:13:23 So now the key here is I can select rooftop unit one. And now I can see the mig, model, serial number, refrigerant, tie, belt, quantity, belt size, any information I want on that one unit, I can see any attachments like diagrams or, you know, different spec docs on that piece of equipment. But more importantly, I can also see the service history. So what you're looking at here is a chronological list of all past work orders performed on that one unit at that one location, which means as the technician, I can open any of these up, I can see who was there, what they did, parts

they use, pictures they took. I can even see whether they captured a signature from the customer before they let all of this information is at their fingertips both online and offline. So again, this tends to be big for our customers because a lot of that phone radio is coming down to this stuff right here. Technicians don't have this detailed visibility. So they have to call somebody back in the office who then has to dig through a stack of invoices to find the one that pertains to the certain piece of equipment that they're talking about, which as you guys probably know is not just a two minute call.

--- Assets ends ---

TROY

1:14:41 Right.

MATT

1:14:43 Now, to mention, you've got important stuff going on in the office and this technician is going down for the account in the field. So do we agree this will cut back on more of that phone radio?

TROY

1:14:53 Yeah.

TROY

1:14:53 Share. Yeah, I'm...

TROY

1:14:54 Sure.

MATT

1:14:55 100 percent... excellent. So we've got services.

--- Deficiencies ---

MATT

1:15:02 We've got assets. And then another fan favorite from the office is how easy it is for that technician to document what they're seeing out there in the field. So, you know, this is for general job attachments. Let's say that I find a dent Ed, panel door when I get there. And I just wanna see why a I'm just, hey customer, it was like this when I got here, right? Maybe it's a before and after picture of a clean coil or repaired coupling, whatever it may be. You'll notice. I'm not texting or emailing this stuff. It's going right into the cloud. It's associated with a work order. You guys can already see it back in the office and I haven't even clocked out of the job yet.

MATT

1:15:45 But on that same note, as we've talked a lot about, one of the most important responsibilities of your technician is to capture document repair opportunities.

--- Deficiencies ends ---

MATT

1:15:57 When they go out there, right? We wanna make that process as fast and easy as possible for the technician. One. So it doesn't slow them down. They get bogged down with admin work, but two, so that it's easier for them to report more lower hanging trout. They're not just reporting the stuff that's already on fire and is a known headache.

--- Deficiencies ---

MATT

1:16:17 But hey, this is drawn high an, hey, this is making a funny noise. It's probably time for replacement. Well, in order to make that as fast for the technician as possible. They're going to go into deficiencies, they're gonna add a deficiency, and then service trade is gonna walk them through a few simple steps, right? So here, let's say I'm on rooftop unit one and I find a bad compressor. I don't have to be terribly detailed here because we know technicians don't like to do a lot of writing or typing. Maybe yours. Love it.

TROY

1:16:46 Yeah, I got to.

MATT

1:16:52 Well, because the next step and this is a big one is gonna make it so much easier for them to document and that is pictures and media. Are you guys currently taking pictures of the deficiencies you find out in the field?

--- Deficiencies ends ---

TROY

1:17:05 Yes, they're supposed.

MATT

1:17:08 How to.

MATT

1:17:13 Yeah, they got a lot going on out in the field. Maybe they're up on 110 degree roof top, you know. So these extra little tasks are not top of mind for them. And usually it means they need to text or e-mail and type a little memo and explain what's happening just too many steps right here.

--- Deficiencies ---

MATT

1:17:29 They can easily snap that picture. And again, it's all being consolidated under this record, right? So I can easily snap my pictures. But instead of doing all that typing of writing, maybe I want to do an audio memo, right? So I can just say, hey, I just found a bad compressor. This is the model number. It's gonna take XYZ for parts. It's gonna take about this long. And I'm gonna run this by the customer before I leave for the day. I already got pricing from the vendor, check it out in my notes or I can describe it right here, whatever that narrative might look like. I can quickly capture all that information and keep moving... next. What's the severity level? I'm not going to have the technician wordsmith, their own description of how severe it is. They're just gonna select from a list right here, right? So I'm gonna say that this is inoperable. What is the piece of equipment? Again? I'm not relying on them to fat finger in, the serial number that they'll likely transpose. Anyway. I'm selecting from the list I've already known about pieces of equipment. So I'm gonna select rooftop unit one. And then lastly, what's the status here, right? Is it new fixed or verified? In this case, it's new. We got a quote it out. And with those few simple steps in a couple of minutes or less, that technician has now successfully reported that deficiency and they've passed the baton off to the office for a quote, right? So they're onto the next piece equipment.

--- *Access to information* ---

MATT

1:18:52 They keep their nose to the grindstone. And before we button this job up, I'm gonna show you just how fast that information travels. So we're gonna pop back into the office and tell me, do you guys see that you're seeing the phone screen, do that? Yeah. Still doing.

--- *Deficiencies* ---

MATT

1:19:06 All right. I'm gonna mirror that again. I'm gonna have to restart my computer after this. All right. So we're back in the office looking at that same job. And when I scroll down, I can already see... I gotta refresh the screen. I can already see the deficiency that technician just reported. But I can do you one better. You can configure it so that whoever is responsible for quoting out this deficiency, they can automatically receive an e-mail anytime a deficiency is reported by a technician. And that e-mail is gonna contain a link that brings them directly to the deficiency details. So now, within a couple of minutes or less... with the information that technician took, I know that we have an inoperable bad compressor founded the program and Irving on rooftop unit one from this preventative maintenance job. And I can already see the pictures in the audio memo that the technician recorded in the field, right?

--- *Quote templates* ---

MATT

1:20:09 So they might still be on that job, but I can go ahead and get started on a repair quote. And doing so is as simple as clicking this button right here. I can add it to an existing quote if I'm already working one up for the customer or I can create a brand new one, which is what I'm doing right now. I'll go ahead and give it an expiration date. And then this is where the magic happens. So this was really unique repair or situation. I could go ahead and create my own custom description of what needs to

be done. I can manually assemble my parts list here, right? But a lot of times you guys might be quoting out for relatively common place repairs like bad compressors, in which case, you can create your own configurable quote templates and select those from a drop down list. Now, these don't come with service trade. Trust me, you wouldn't want them anyway. Our sales team just copied and pasted a bunch of stuff from Google in here. So these would all be custom to whatever you want. But I'm gonna grab my Goodman compressor replacement. It's gonna repopulate my scope of work here and it's gonna pre populate the items commonly associated with a repair of this type. So if this isn't a 100 percent match, we're 80 to 90 percent of the way there, right? So let's say I listen to that audio memo and the technician said, hey, this is gonna take four hours, not the usual three. And it's also going to involve a couple of widgets because no repair is complete without one... and you'll notice that service trade can house both, your standard parts costs if you guys track that sort of information.

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

MATT

1:21:51 But it can also house your customer specific pricing contracts, right? So I don't have to look up in an excel spreadsheet, what rates these people get? It's? Gonna default to that location, which means it's automatically marking them up for the pricing contract.

--- *Quote templates* ---

MATT

1:22:08 And because I have both those pieces of information in here, I'm never. Losing sight of the gross margin as I build this out for the customer.

TROY

1:22:16 So, what does the final quote look like when you send it?

MATT

1:22:20 Thought you'd never asked Troy. I can't wait to.

TROY

1:22:26 You know, who would save time on this for Richard? Is Sandy she.

--- *Quote templates ends* ---

TROY

1:22:31 Do...

TROY

1:22:31 Your quote for you?

MATT

1:22:35 Is Sandy does the quoting over there?

TROY

1:22:38 Does it for Richard?

TROY

1:22:40 Up for him? He, he writes it on paper. Gives it to Sandy to type it.

MATT

1:22:47 Sounds like saying you could take a vacation?

TROY

1:22:49 Yeah, yeah.

TROY

1:22:52 I do my own.

MATT

1:22:53 Humble brag, yeah. Well, before I show up the customer pleasing, I... what's that?

--- Quote templates ---

TROY

1:23:05 It was this easy. I mean, I can do it.

MATT

1:23:09 That's right?

TROY

1:23:10 Yeah.

TROY

1:23:12 Would take him forever to type that.

MATT

1:23:18 Yeah. Well, that's the idea here is why reinvent the wheel? If you're doing a lot of this stuff already? You know, again, 80 to 90 percent of the work is done for next time. And the other thing that I'll show you is that you can also easily toggle the detail level of these quotes. So, somebody, if you present them with a grand total and

they say, hey, can you break this out for us? You don't have to go back and retype up the quote, right?

--- Customer engagement (quoting and invoicing) ---

MATT

1:23:40 You just select a different detail level. I like grand total only because where there's mystery there's margin, but you might have some customers that require you to break it down into whatever format. But I'm gonna go with grand total only. And then I'm gonna go ahead and send this to the customer. When I do, I can select my contacts actually, I'm gonna send it to everybody with people that missed us, right? I can type in my own custom e-mail here if I want. I like leaving it blank. And then you see there's media here. We know how powerful these pictures are, right?

--- Deficiencies ---

MATT

1:24:17 You've heard of a picture is worth a 1,000 words. Well, one of our customers has gone as far as to say the picture is worth a 1,000 dollars, because when you start including pictures on repair quotes, that approval rating just goes through the roof because we're no longer telling the customer what needs to be done. We're actually showing them they don't know what a condenser or a bad compressor looks like. But the fact that you took a picture of it shows that it's serious and that you are thorough. Well, let's say the audio memo, the technicians cursing like a sailor, and we don't need our customer to hear that fit.

--- Deficiencies ends ---

MATT

1:24:47 We can go ahead and filter that off. And now, this is why I wish all you had access to your e-mail but it looks like Richard will be the one pulling it up on his phone. I'll pull it up on my screen. You'll be able to see what it looks like from a computer... but Richard, you're gonna get an e-mail that's and it'll have a button that says view and respond to quote.

--- Customer engagement (quoting and invoicing) ---

MATT

1:25:11 And when you hit that button, that will bring it into the actual quote, which is what we're looking at here?

TROY

1:25:16 No.

MATT

1:25:18 So, it's got another Amazon prime marketing impression. It's got your logo on there. We scroll down here's. The scope of work as was defined by the template we

used, we see what piece of equipment we found as bad compressor on. And we work with a grand total only for the price. And down at the bottom, your customers are free to expand print, save whatever they want to do with these pictures to build their trust. And then of course, at the bottom of every quote is your very own terms and conditions, all the legal jargon.

TROY

1:25:54 That's nice. I don't quote, but it looks easy. Well, yeah, it's very streamlined.

TROY

1:26:02 Yeah. So, I guess you can also because with one of our customers, when you put a quote, they use Kareo.

--- *Forms* ---

MATT

1:26:11 Okay.

TROY

1:26:12 You have to drop a PDF of your pot onto the Kareo, I guess you can save it as PDF and then drag and drop it on there. Yeah.

MATT

1:26:22 Good question.

TROY

1:26:23 Never understood why they require that because you have to go in and enter the quote.

TROY

1:26:28 Like you're gonna lie in when you're putting?

--- *Forms ends* ---

TROY

1:26:33 Look at your PDF to make sure that matches were physically entered it.

TROY

1:26:36 Yeah, it's...

TROY

1:26:38 It's a waste time.

MATT

1:26:41 Third party work. It's that's for the birds. I remember you saying you don't do too much of it?

TROY

1:26:47 We only have one customer but a big one.

TROY

1:26:50 Yeah.

MATT

1:26:51 Necessary evil. In some cases.

--- Customer engagement (quoting and invoicing) ---

TROY

1:26:53 Yeah.

MATT

1:26:55 Now, do you guys happen to know is notice this big green money button up here?

TROY

1:27:01 That's tough. Yeah, kind of it's covered up.

MATT

1:27:05 No. Is it what's it covered up by?

TROY

1:27:07 It is the screen.

TROY

1:27:08 Yeah, or us and you?

MATT

1:27:12 Cool. You're you've got the, you got a?

TROY

1:27:16 You know, there?

TROY

TROY

1:27:20 There you...

TROY

1:27:21 I...

TROY

1:27:24 Need to look at the...

MATT

1:27:26 Now, Richard, go ahead and approve that quote. I promise, I won't send you the Bill, but that way you can see what your customers would see if they were interacting with it. And hopefully you guys can see this. I'm gonna click that big green money button and this gives you an idea of what Richard is looking at, but this is where I can enter my po, number information that is required here is, I have to acknowledge that I've read your terms and conditions, which makes it a legally binding digital signature. Now, how are, your customers currently approving quotes? Are they printing signing scanning, sending back to you?

TROY

1:28:03 It's...

TROY

1:28:05 Like, of course, the ones on cargo, they approve on Kareo, regular customers, we have a standard template. We send it to them. If it's a small quote, then just saying, hey, do the work is good enough? If it's a large one, we require them to sign it, send it back with digital signature.

MATT

1:28:29 Okay. Now, what would your customers think if they get hit with a quote? Maybe it's on their phone, right? And they see the pictures, they see that clear signature, the clean layout and they can just click this button and ask for more of your business right there on the spot. Can you see them approving more quotes or maybe approving them faster?

--- *Deficiencies* ---

TROY

1:28:51 They probably approve fast. Like you said, you got the picture and all that. It's like, you know, they can see, you know, I think that's a lot like you were saying earlier. You know, you said I got a compressor out mean most people are like compressor.

TROY

1:29:12 What?

TROY

1:29:12 Is, how big is a big part?

--- Deficiencies ends ---

TROY

1:29:16 You said you were? Or I'm just gonna say two grand and like three grand. You know, what I look at the picture is resort bad, you know, then they can kinda relate a picture site. Okay? It's not a three inch by three inch box, you know, it's something big.

MATT

1:29:45 Yep, absolutely. Or even, if you include a video of you showing it brunting or humming or spark in or any of that stuff. It's like, okay, never mind. Shut up and take my, right? It clearly needs fixing.

TROY

1:29:59 Right.

TROY

1:30:00 And like you say, and then they can see if they can approve it or, you know, if they wanna make a change or something, you know, it can be done it right back to nine times out of 10. They probably get approve it.

--- Quoting ---

MATT

1:30:16 Right. So now, because this is an online quote that never leaves your system. You're gonna be able to track all of the behavior and activity of that quote, right? So I can see all the steps taken to create it. I can see who it was sent to. And when I can see when they looked at it, if you had approved it, Richard, I'd be able to see when you approved it or if you requested changes in much the same way that you guys can get notified, any time a efficiency is reported, you can also get notified any time a customer is looking at a quote anytime they've approved it. So you're not sitting around scratching your head, waiting to go execute on the work. You get notified right away. We turn this into a job and we're off to the races.

TROY

1:31:02 That's another thing like when we get a job approved and the charter their join host too. So, you know, you can print it on board and ready to go, you... is approved.

MATT

1:31:16 That's right, Richard. So I actually just manually approved it here from the office. And once I do that, these two new buttons pop up where I can either add this approved service to an existing job if I already got a tech going out there or I can create a brand new work order from this ticket, give it a due date and it's gonna transfer all of the information from that quote.

MATT

1:31:40 So, the scope of work goes in all the parts and pieces going in the customer information, the piece of equipment, and even the pictures in the audio memo from that technician. And now all I gotta do is schedule this job which I can do on the dispatch board or heck, I can do it right here from the job itself.

--- Access to information ---

MATT

1:32:01 And now as soon as I do, that technician just received his job on their mobile device and they have everything they need.

TROY

1:32:07 Yes, that's gonna be so much better for doing... his looking back on the job. And somebody say Glen went out on Brian after I did. So he can just go back to, I think looking back is gonna help everybody as far as technicians.

--- Access to information ends ---

TROY

1:32:36 You know, some way well in a month ago. Now, I... so do they work on the TAM? Did they ring? You know, they can know what they did before and you say, well... well, we replace the, so I call back or is it something else that, you know, the technician catch the first one? So I did at one time I change the, there was water on the floor, changed it walked off or did it all up? Got it all up and running a day later, call back water on the floor. So back again, look the catch it the first time. Probably not.

--- Customer engagement ---

TROY

1:33:27 So, you know, that's where I think, you know, I need to look back and see what was done prior to, the job on. So.

MATT

1:33:38 Because nobody wants to repeat a bandage, right? That's a bad customer experience. So really what you're talking about here, Richard is if you guys have access to service history that's very convenient for, the technician to look up, you're talking about not only improving the speed of the repair, but you're improving the quality because you're not doing the same thing the last tech did and it allows you to kinda troubleshoot further.

--- Deficiencies ---

MATT

1:33:59 But, okay, we knock this off the list. Clearly, it's not that maybe it's this and you can move onto the next thing. Yeah. Now, what I just showed you guys with this, what we call the deficiency loop, the technician reporting a problem. You guys get notified in the office, slap in a template on it, getting that quote out to the customer and get it turned around real quick.

--- Customer engagement ---

MATT

1:34:19 We call that the deficiency loop. And this is hands down one of the favorite features of service trade just because of how much revenue this alone generates. So let me ask you guys this with how easy it is for the technicians to report deficiencies on the mobile app.

--- Deficiencies ---

MATT

1:34:36 Can you see them reporting that lower hanging fruit? You know, more of the stuff? It's not quite on fire. It's not broken yet, but they can see it. The meter reading, is a questionable it's making a funny noise. Can you see them funneling more of that pipeline back to the office? Yeah.

--- Deficiencies ends ---

TROY

1:34:54 I mean to point to say, you know, making a noise and all laughing out there like that or, okay, Robert?

TROY

1:35:13 Not doing?

MATT

1:35:14 The saying, well, they start inventing problems and making stuff up. But a lot of times if it's hard for a technician to document this stuff, you know, and the tie goes to the runner.

--- Deficiencies ---

MATT

1:35:25 There's gonna be like, it's probably fine. Really. I'm just gonna spend my time on the stuff that absolutely needs it right now. But if it's quick and easy, can you see them all of a sudden starting to capture all these suggested deficiencies as they go?

TROY

1:35:36 Yeah. I think our technicians at least like it to be as easy as possible. We do have some technicians that will write out, you know, this issue could happen in the

future. I noticed this but that's few and far between. So I think if we made it as easy as this, they would be more likely to just click a couple of buttons and be done with.

--- Customer engagement ---

MATT

1:36:07 Absolutely. And we hear that a lot from our customers too. If it's hard, they're simply not gonna do it. So when you make it easy and maybe you track it as a KPI and you're like, hey, you know who's my best reporter of deficiencies. Maybe you start an incentive plan, whoever finds the most issues, gets a gift card or something at the end of the month, right?

--- Quoting ---

MATT

1:36:27 But now you get a more pipeline of repair opportunities coming back to the office. But now you're getting notified as soon as they're reported, you can slap a template on there, make some fine TUNE changes. Can you see getting more repair quotes out faster to your customers?

TROY

1:36:44 I can, I think most definitely, you get out faster.

--- Customer engagement (quoting and invoicing) ---

MATT

1:36:50 Awesome. And none of these are truck questions by the way. So you guys are tracking now, if you're getting more quotes out faster, but now they're coming complete with pictures that tell a story to the customer. And instead of printing signing scanning and sending back to you, they can just click a big green money button, acknowledge your terms and conditions, and you just got a legally binding digital signature. Can you see getting let's say one more quote approved per week with a system like this?

TROY

1:37:21 Yeah, we.

TROY

1:37:22 Yeah. I mean, I think the ease of it. I think if it were me and I was receiving a quote, I would probably be more apt especially when I can see the evidence with the pictures, maybe a voice memo and I can just click, yes, I don't like to talk on the phone. So if I can just click a button and say, do it, that would win me.

--- Deficiencies ---

TROY

1:37:51 Yeah. I, that and the fact that like you said, let's say they're working on a large job and they find something a bad compressor. Well, you go ahead maybe before they're even done, you've sent it off to the customer. Hey, they found a bad compressor.

TROY

1:38:08 Yeah. Do you want us to do it now on?

--- *Customer engagement (quoting and invoicing)* ---

TROY

1:38:10 Started on it. Yeah.

MATT

1:38:15 Clip charge that's good customer service.

TROY

1:38:17 See, and...

MATT

1:38:18 You're right? Alicia, that approval button is reminiscent of Amazon prime, dangerous by now button that probably gives us all trouble pictures. You get caught up in a moment and you're just spamming that bad boy... that's the name of the game.

--- *Quoting* ---

MATT

1:38:34 So, if I was to ask you guys, you know, what? We, we'll be super conservative here. What is the average quote? Let's say it's not even a big quote. What's like the average dollar value of a quote that you guys send out?

TROY

1:38:49 Well, right now... I would say.

--- *Pricing* ---

TROY

1:38:55 Probably.

TROY

1:38:56 With the at and T stuff around 2,500 dollars, roughly, okay from there, you know, it varies.

TROY

1:39:06 Would be on the lowest. I would say average maybe if you're taking all of it and averaging maybe 5,000 dollars.

TROY

1:39:15 Yeah, I don't know. Yeah, because sometimes, I mean, what's really happened, is with the like at and T, well, they want everything quoted on the same platform. So, yeah, like we had a compressor the other day it was 40,000 dollars, you know? So, which is, you know, I mean that sounds for like a service call that's a lot of money. The next one, you know, 800 bucks. So it varies, but.

MATT

1:39:50 I'm gonna do you one better. And I appreciate you guys putting so much thought into this. Let's just say it's one of your small ones. Let's call it 2000, right? Just say, so you get only one more quote approved and it's only one of your little guys, right? So we'll say 2000 dollars. What you're talking about there is an extra 104,000 dollars in revenue a year, right? That's not even talking about that 30 40 50,000 that you save on all the access, phone calls and noise from the lack of visibility of information, right? So we're already to around 150,000 dollar difference here by using technology like this using something like service rate.

--- Pricing ends ---

TROY

1:40:30 Yeah.

MATT

1:40:32 And that's hyper conservative. The reality is it's going to be way more than one more quote a week because that's what our customers experience and it's gonna be a mix of your average and larger quotes. So that number jumps dramatically. So, I appreciate you guys humoring me through all those questions because like I said, from the beginning, this is not about bells and whistles, and having a shiny new toy. When you guys talk to your owners and your leadership about this. I want it to be easy for you, to explain and justify why modern technology is about generating more revenue. It's not about cutting costs and lowering your overhead. We help with some of that, but that's not where the opportunity is in a market where the demand for what you guys are doing is extraordinary.

--- Purchase decision ---

TROY

1:41:15 Yeah. So.

MATT

1:41:18 It's it's pretty surprising that even an hour and 42 minutes is not enough to show you all of service trade. There's. A bunch of stuff we didn't show you here, but I wanted to be mindful and respectful of you guys as time so far out of everything that

I've showed you today, is this about what you had in mind for a service management platform?

--- *Dispatch* ---

TROY

1:41:37 Yeah. I mean... the only thing you never did show us the dispatch or can we see that before we like.

TROY

1:41:47 You?

MATT

1:41:48 Do that really?

TROY

1:41:49 No, there, there's so many things in these things to look at it's...

MATT

1:41:53 Yeah.

TROY

1:41:54 Probably it possible to see it all.

MATT

1:41:57 Yup. But dispatch board. So this is something that we actually just recently redid and we've got some more, excuse me, more features coming to this. This is kinda the initial roll out of it. But here's the dispatch board, and we've got our technicians organized by division. So brace your eyes. This is a demo account.

--- *Type of work* ---

MATT

1:42:17 So we've got like 50 sales people that have developed their own division. But I can see, you probably have like an H back division and a plumbing division. And under each division, you'd have your different technicians in there. You can color code your technician for a nice visual there.

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

MATT

1:42:35 But also, you can hover over them and see specific notes about that technician, right? So I can see his certification, so I can see what kind of work he can handle. So on and so forth.

TROY

1:42:47 I, you know, like you got some guys can work on boilers, some guys can scroll down or... no, you get this guy here. We have a few, the well.

--- *Dispatch* ---

MATT

1:43:10 In service is about speed and collaboration, right? You guys need to be able to dispense this work quickly. So, you know, the more information you have living on your dispatch board, the easier it is for you to make those calls like in the action. So first and foremost, the dispatch board is good for visibility.

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

MATT

1:43:29 So I can see the, you know, the different jobs that I'm working on. Let me see here. Let me go back a day that was a different job. So I can see, the different jobs that I'm working on. And here's the one that we're working on today. So if I click on that job, I can get some more details about the job or if I want to open the job up itself and just look at the full blown work order. I can do that directly from the dispatch board. And you see here, when I click on this job, I can see the clock events. So I can see that the technician was in route for about two minutes. It's hard to see because I was only in route for about two minutes, but I can see that he's been on site for 30 minutes, right?

--- *Dispatch* ---

MATT

1:44:15 So I get that information immediately on the dispatch board and I see these little icons where I can tell what kind of work they're out there doing and I can tell who I'm sorry, go ahead.

TROY

1:44:27 No, I was just talking about your time. So I like it detail how long you've been out there and, you know, I like that.

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

MATT

1:44:38 Well, I'm gonna actually clock out of this job real quick which ordinarily I would show you that process on a demo. But in the interest of time just to kinda show you clock out. And then in a little bit, we should see that job marked complete. And so when that is marked complete, I'm gonna see a green check mark on it showing that the technician has finished this job and that's going to be my visual indicator that they are ready to receive another job... and my internet has been slow today. Let me try refreshing that just to move it along.

MATT

1:45:23 So jumping all over on me now, I can see that check mark. I know this technician is done. So they are available to receive another job. And then I can see Steven and Tim. They don't have any jobs. It looks like they're sitting on their assets. So I might as well just drag and drop some jobs down to them and get them to work. In order to do that. I can either add a brand new job that might be coming in on the phones or I can select from available jobs, right? And right here, you can search and filter your results. So right now, I'm looking at just the jobs for the commercial for my division, my office. But when I edit filters, I can search by job tags, I can search by job types. So maybe I just wanna see service calls, right? I can also move this out of the way. I can filter by job owner. I can filter by... due dates. So there's a lot of different ways to look at my available word, certain type of work if I wanna filter by technician. And then just like that, I can either drag these available jobs to my queue. So if I want to separate some important jobs that I, you know, I definitely want to get done today.

MATT

1:46:44 I can drag those into my queue to kinda pull them out of the pile or I can drag them directly to the dispatch board. And as soon as I release that job, it's now gonna show up on the technician schedule and it can automatically notify the technician letting them know that something has been added or removed from their schedule.

TROY

1:47:07 Now, can you assign, so that crop job you just stuck under there? Can you add, give it to multiple technicians?

MATT

1:47:15 Can... the new board? So it'll take me a little bit to find it. My eyes aren't trained to this one.

MATT

1:47:37 There is an easy way to do that. But again, this is the new board, so.

MATT

1:47:49 Yeah, I'll have to double check on that for the new board. This is like only my second time showing it. They probably put the button in an easier location, okay?

TROY

1:47:59 But it's something that's obvious. If you're you can have guys on a compressor, change out. You're gonna drop, give it to both of them. So they both have it.

MATT

1:48:08 Absolutely. Yep. And on the old one, you just click on this and there would be a button to add another technician. You throw them on there. So the new dispatch board has only gotten better. It's not taking a step backwards. So it's going to have all the functionality that the old one had. But it's gonna have some extra bells and whistles that make it easier. Okay?

--- Accounting ---

MATT

1:48:32 So this is it, the only other thing is adding a job. So here I can look up, say it's a current customer. I type in just a few characters of their name and it's gonna pull up a list of the closest matches. So let's say it's the Rogan Austin.

--- Assets ---

MATT

1:48:47 I, it's gonna automatically put in my primary contact information, all the address information. And then from here, you know, I can determine what type of call it is. In this case, it's a service call. And I can say front of the building is getting warm. If the customer knows what piece of equipment it is, they can select from this, drop down of the equipment at this one location that I just selected. So maybe they know that it's rooftop unit one. I can designate that service line will be back in this case. And then I can have a note for the text. So maybe I say diagnose... prepare, add asset while on site if we didn't know what asset it was, and maybe I wanna put in a note like NT equals three K.

--- Dispatch ---

MATT

1:49:47 We'll say it's due today. I can add another service to this, but I'll go ahead and just save this. And now when I look at my available jobs?

MATT

1:50:01 Under job type service, I check service call. Yep. Service call. I can see that job right here and drag and drop onto the dispatch board, or I can pull it up into my queue up top there. And same flow as before, that technician has notified that something has been added or removed from their schedule.

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

TROY

1:50:23 So, is the service call assigned a job number?

MATT

1:50:27 Yep. Automatically.

TROY

1:50:30 Okay. So I may have asked you this the other day. And since Alicia, it weren't here. Now, can you let's say that this is what, we have, what we call contract job numbers where they go for the Construction department. Can we... create that in the same space and put the job number as the contract number?

--- Accounting ---

MATT

1:50:55 So... you in service trade, you can't change the job number. Those are eight digit randomized unique identifiers, but you can do things like add tags. So if I wanted to put the Construction job number in here as a reference to tie back to it, I can absolutely do that and I'll be able to search by that number.

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

TROY

1:51:16 Okay. So the job number then is, does it start like say, you get the system and say we're on job 85,400? Is that where it starts? We, we would start with that number so that our work orders are still in sequence?

MATT

1:51:36 So they won't be in sequence either not by the job number. And let me get clarification on your question because a lot of people who will come from older creative ways of doing things rely on creative job numbers in order to do, excuse me reporting, right? So you can tell, you know, what, your H, back revenue accounts are, or, you know, what year it was done. They'll bake like dates in like alpha numeric things in so that it's easy for them to find it in their antiquated software. Is that where you guys are coming from with a special job numbering process?

TROY

1:52:13 So, so when we open a work order in S2 thousand, it is, I mean it literally started if you went back to OOOO1, that first work order and now we're on 76,000 something.

--- ST app contracts and pricing ---

TROY

1:52:32 Something. Well, so every time we open a work order, our problem is that because we have a big Construction department, well, we have what we call contract job which is only four digits. And so when the guy goes out and he does work on the contract job. Well, I guess what I'm trying to say is it gets hung up in the ether where there's materials on it that never gets charged out because we don't have a way to put it in as 2000 to show that we've charged for that stuff.

--- Pricing ---

TROY

1:53:07 You know, we have to do it all by hand. That makes sense. So, so what would be nice, is where your job number, which we call a work order number, you can go in there and say, no, this is gonna be 5,500. And then that case, that would never change once they assign a job, say we're doing a job at a hospital and it's 5,500. It never changes. It will always stay 5,500.

TROY

1:53:38 I think, yeah, well to me because I know...

TROY

1:53:43 You know?

TROY

1:53:45 I think where he put that tag?

TROY

1:53:47 Yeah.

TROY

1:53:47 If it's 5,500, we would put that. And then when we wanna see what parts were used on 5,500, we could just go to the search bar wherever that's at 5,500 and it'll pull up everything. We've tagged for that and we can see.

--- Recurring maintenance ---

TROY

1:54:09 Okay.

TROY

1:54:10 That, and that way, we can track the tag.

MATT

1:54:15 Yep.

TROY

1:54:16 So...

MATT

1:54:16 This is an example, this is an example of a report in service, right? And this is a jobs report. You can run reports on quotes, invoices, deficiencies, assets. But here's a jobs report, and you can see the plethora of different filters I can use to quickly search for any special aspect of a job.

--- Recurring maintenance ends ---

MATT

1:54:36 So, for example, my first thought is I would go to job type. And if I wanted my project work orders to be under Installation, right? I can do that or I believe we even have... I think we have the project. We have so many different ones in here, start up, it might be a start up.

--- Recurring maintenance ---

TROY

1:54:58 Yeah.

MATT

1:54:59 But there's a bunch of different job types you could designate in here specifically for project work. But for now, for lack of a better one, I'll say Installation. Now, I can run a report on all of my Installation work works. So if I wanted to use the tag, I can also search by that tag right here. I could even search by the customer, the location, the technician that was on it, the status, the scheduled to the due two. So there's a.

TROY

1:55:27 Sorry, if we did the salesperson as a project manager, we could type them in and run a report on their job.

TROY

1:55:36 Yeah. Well, I was just saying, you know, in terms of, you know, on a contract job, we'll have multiple guys on the same job at some point and that's where if it's all in one spot, well, you know, I'd be like, so if he goes well, you need to go to the tag to find the job that would work as then it's gonna be the same work.

--- ST app contracts and pricing ---

TROY

1:55:59 Right.

TROY

1:56:00 And if he uses materials on, you know, Tuesday and then three days later, another guy goes to the same contract job and uses materials he needs to get them added on.

TROY

1:56:10 Yep.

MATT

1:56:11 Yep. So, so here's something I may not have explained well, but any given one work order can have multiple services as well as multiple appointments. So we

actually have the ability to manage what we call service projects on here. And so if you think of these services as different phases of the project, you might have a demo phase. Well, you can schedule that one phase for five days for two weeks, however long you wanna do it, you can schedule multiple guys to that one appointment or that one service, right?

--- Tech On-site ---

MATT

1:56:50 So as they're clocking in and out. So you've got five different guys on there. They're clocking in and out. They're adding job items, they're adding labor hours, they're taking pictures. All of that information is flowing back to the same work order. So when you scroll down here and you look at things like clock events, you're gonna see all of their clock in and out activity.

--- Tech On-site ends ---

MATT

1:57:09 You're going to be able to see all of the documentation. And then you're also going to be able to see all of their parts and pieces that they've added on here and it's all coming back to the same ticket, right? Okay. Is that more of what you were looking for?

--- Parts management (inventory) ---

TROY

1:57:25 Yeah. I mean, I think that would, yeah.

TROY

1:57:27 Because if it's like that.

TROY

1:57:30 Yeah.

TROY

1:57:30 We can run and see, we can see, okay, 5,500 tag. They use the truck stock. We, I assume we can print that out to accounting to get it out of.

TROY

1:57:44 Yeah. What about, what was the question you today about the number you asked me about?

--- Accounting ---

TROY

1:57:49 Customer number?

TROY

1:57:51 Is there a place to put a customer number in the customer? Is our accounting identifies each customer with a, with their own number?

TROY

1:58:02 Yeah, yeah.

TROY

1:58:04 We...

TROY

1:58:05 Have to manually input whatever number they tell us for the customer account number?

MATT

1:58:14 Yes.

TROY

1:58:15 Yes.

MATT

1:58:16 So you can have a store number?

--- Accounting ends ---

TROY

1:58:20 On...

MATT

1:58:20 Here, which I think would suffice, you can also use tags on the location as well. So you could use that same searchable tag as the customer number on there and that will show up on jobs. So there's absolutely a few ways to do that. Usually when we, this is not really relevant to you guys because I'm not too confident that we can integrate with the dos system.

--- Accounting ---

MATT

1:58:43 But usually when we're doing an accounting integration, we have mapping built in the background where we'll actually map customers and service trade to a specific customer number. So that way invoices are just magically flowing over to the proper account. So we're no, straight.

TROY

1:59:01 Okay.

MATT

1:59:04 Good questions. Guys. Are there any other questions on, the dispatch board? Does this look a little bit easier than using an excel spreadsheet?

--- Purchase decision ---

TROY

1:59:12 For sure.

TROY

1:59:15 I think in baloney, sandwich, is he works easier, right?

TROY

1:59:20 Yeah.

MATT

1:59:20 What?

TROY

1:59:23 Yeah.

MATT

1:59:26 Troy, I'm curious. You already looked at BuildOps. You told me a little bit about your feedback on them. What are, what are some of the major differences you'll be seeing between BuildOps and what I showed you here today?

--- Purchase decision ends ---

TROY

1:59:38 There are.

TROY

1:59:38 Really? We're heavy.

TROY

1:59:40 In...

TROY

TROY

1:59:40 The project management stuff. Of course... their dispatch board is very similar, trying to think.

TROY

1:59:51 Quoting thing. He didn't go a whole lot into.

TROY

1:59:54 Other than I, I'm sure, very similar. You can quote straight from.

MATT

1:59:58 There.

TROY

1:59:59 I don't think they have the approval, but the, I don't think.

--- Purchase decision ---

TROY

2:00:03 That...

TROY

2:00:04 I...

TROY

2:00:06 Yeah, I can. Yeah.

TROY

2:00:08 User friendly.

TROY

2:00:09 Yeah. So, and I did talk to my friend luck and Bill about guys. He said that, yeah, they like it so far. You know, he said there was a few little learning curves obvious, but, you know, I saw, of course, you know, I will, you know, I asked him, you know, do you think it's improved your efficiency? And of course, I think, I don't know what luck and Bill had, but he was like, well, our bar was so low.

MATT

2:00:41 Anything makes sense?

TROY

2:00:42 Better. I said, well, I feel at this point, I mean, anything makes sense is gonna make us look better. I mean, it's obvious we're not moving from something that works.

TROY

2:00:55 We're moving from something that doesn't work. We're just trying to get functional again. So, but yeah, he didn't have anything bad to say about it. He, he was all, you know, it was good. So far. I think his only complaint was that they started late and so they hit the busy season while they were trying to implement and he said it was, that was not fun.

MATT

2:01:20 Yeah, that is tough and that's kinda what I told you. I did some research afterwards and found out, I think, they've only been on it for a few months and what held them up is something to do with the accounting integration. They had a bunch of specific asks and there were some partners we were dealing with. So it wasn't so much the service trade piece and getting that rolled out. It was, they wanted all the accounting stuff buttoned up before they were going to run operations through it. So that's why they had a longer than usual implementation. But, but yeah, implementing in the middle of busy season, that's rough for a mechanical contractor, so.

TROY

2:01:58 But...

MATT

2:01:58 I'm probably we're circling back with them a few months from now to see, you know, because a lot of times there's that learning curve. But once you get it down and you're off to the races, you have a action of it.

TROY

2:02:12 Yeah, but no, I mean, you know, without using it, I mean, they look very similar. I mean, I'm sure you guys have some things. They don't probably vice versa, but we have some guys that work here that worked at Jackson that use BuildOps and, you know, they had some good things to say about it. And so, you know, this wasn't great or that was great, but, you know, that's going to be with anything though.

MATT

2:02:39 Yep, per.

TROY

2:02:41 It is somebody's gonna find fault with it just because I mean, this looks good. It's just, you know, like you said at the beginning, it's just a matter of, I think timing and, you know, I've really been kind of pressing long here recently about let's you know, let us delve into what you bought. Let's see what it looks like right now. So we can make, you know, even if we don't do a decision right now, we need to know what we're gonna do because we're fixing to get into the point where we're every year, we get bigger and we can't keep putting it off. Sure that's the problem. I mean, Alicia in

the summertime. I mean, I don't how much she gets buried with building in the summertime because that's our busy season and if it set it up.

TROY

2:03:35 Yes.

TROY

2:03:35 You know, 30.

TROY

2:03:37 Yeah, I think have.

TROY

2:03:41 So.

TROY

2:03:42 30.

MATT

2:03:42 Percent mean, would that mean?

--- Paper process ---

TROY

2:03:46 Yeah, I mean, you'd be up to date.

TROY

2:03:49 Yeah. I mean, from, as it is now, sometimes it can take the technicians months to turn in a work order. And because our systems don't talk, I don't know that's something is overdue. So, something like this where it's streamlined, I can see a work order has been turned in or not. I mean, it would just streamline the process so much and I think from a profit standpoint, it would get the revenue in a lot quicker.

MATT

2:04:28 Yeah. You guys have a hard time collecting payment when a work order is handed in months later.

TROY

2:04:34 So, customer sure are happy sure.

--- Paper process ends ---

TROY

2:04:37 That is literally our number one. If any customer complains. It's not price. I mean, that's up there, but it's why am I getting a Bill three months after you were out here for six months, yeah.

TROY

2:04:54 Like the last?

TROY

2:04:55 Question, I don't know.

TROY

2:04:56 You know, the only thing we can say is I'm sorry, the technician just turned in his paperwork, which to a customer that you're a very unorganized office at that point.

TROY

2:05:11 Yeah.

MATT

2:05:12 That's that's something a lot of people don't think about. We're not just talking about cash flow here. We're talking about your reputation as a service vendor. You know, it can be easy to lose confidence in them if they can't do something as simple as send you the Bill for the services rendered.

--- Pricing ---

TROY

2:05:26 Right.

MATT

2:05:27 Yeah.

TROY

2:05:34 I'm hoping to get your pay or I'm gonna pay it at the end of the month, you know... I get a deal for two months or three?

MATT

2:05:46 You know, you forget.

TROY

2:05:47 About it really? People, do they like now, when they get to be, they're like what do I can see it?

--- Pricing ends ---

TROY

2:05:59 I mean, and that's like, you know, as far as, you know, the approval deal, I think you're gonna see a lot more that, you know, they can see if you, you're gonna improve it, you know, there's no, I think. And then like you said, the billing out is a big deal for that's. Probably get all the time like you did that or much.

--- Pricing ---

MATT

2:06:29 Yeah. And honestly, that's just the ones that you guys catch a few months later, right? What about the ones you never catch, you know, dollars go unbilled?

TROY

2:06:40 You know, we do have those and I've caught some and I just, you know, zero out because I can't Bill it a year and a half later. How many?

MATT

2:06:52 How many times you come across those a year?

TROY

2:06:56 Usually I catch in October at our fiscal year. Sometimes, I mean, I'll catch it'll. Probably be just a handful, maybe five max a year... but I mean, it's definitely there.

MATT

2:07:20 Big ticket items. Usually, is it just a few 1,000 per?

--- Paper process ---

TROY

2:07:24 I wouldn't say they're big ticket, probably less than 2000 for the most part.

MATT

2:07:32 Okay. But yeah, I mean, so.

TROY

2:07:35 Yeah.

MATT

2:07:36 So do.

TROY

2:07:37 I mean, there are just little service calls that, you know, that got pushed back or taking just didn't turn it paperwork in and that, and that's the biggest thing for us,

you know, even with a form, you know, we saw a little bit better but it's not, it's still hung out.

TROY

2:07:56 Yeah. When, when there's too many places for information to be, it's pretty much impossible for us to track.

MATT

2:08:06 Right. Because it's fragmented. I mean, hell, it inconsistently works for your technicians in the first place. So, now you got some text on paper, some text you're using jot form and in their work orders weeks or months later, that's a lot to stay on top of like you guys, are kinda damned from the start because that's, your process of getting information from the field. So.

TROY

2:08:29 Right. Yeah. And I had a technician the other day that says, who tracks, when we turn in work orders? I said, nobody tracks that nobody has time to go over here to look and over here and merge everything together. We have too many work orders and too many technicians.

--- Paper process ends ---

TROY

2:08:53 I used to try a couple of years ago and it would take me a full day and a half to just try to track everything down.

MATT

2:09:03 Well, the good news is again, there's such an extraordinary demand for what you guys do. You really can do a bad job.

--- Paper process ---

MATT

2:09:13 You can actually afford to miss out on invoices. You can afford to have delayed billing, you can afford to have missed quotes, you can actually afford that phone radio. You're still making money. But what scary is thinking about all that money you're leaving on the table? How much extra money you could be putting in, your pockets or the owners pockets as it were? So, when you guys talk to the owners, that's the messaging that you need to give them is like, hey look, we can keep going on the system. It's not going to be fun. We'll still make you some money, but we need you to understand all the money you're missing out on by keeping us on this broken system.

--- Paper process ends ---

MATT

2:09:50 There's so much we could be doing so much better here are all the reasons why, you know, we looked at something like service trade. They appear to address a lot of that stuff and we'll put us in a much better position.

TROY

2:10:02 Yeah, no, for sure. Yeah, it's been a mess and that's why I'm pushing for it before we can't keep, we can't keep waiting. That's the problem. Yeah.

MATT

2:10:15 As you get back, sorry, I mean.

TROY

2:10:19 I said lawns been doing me like the guy from office space when he's I'm walking down the hall, he sags around me because he does is, hey, what are we gonna do this on? Yeah. Read that. Yeah, yeah.

MATT

2:10:42 Well, as, you know, savings make a pile and as you add technicians and people to your organization, all of those problems simply magnify they don't just up linear.

--- *Purchase decision* ---

MATT

2:10:53 It starts to exponentially go up. So I'm here to support you guys. I wanna be a resource for you. But like I said from the beginning, first step is just showing you what we have. It sounds like this is a good fit. It sounds like this would provide you guys a lot of the stuff that you're lacking will make you more money.

--- *Purchase decision ends* ---

MATT

2:11:13 But I'm gonna leave the ball in your, I'm gonna send you a recording of this demonstration so that you can share it with lawn or you can share it with the owner. And then I'll probably follow up with you in a week Troy just to see how those conversations have gone. And then you let me know if we want to table this till later in the year or, you know, let me know what they say, what they wanna do in terms of setting up that new accounting system, exploring that existing service module and we can take it from there.

--- *Purchase decision* ---

TROY

2:11:43 Yeah, yeah, no, absolutely. Well, like I said, I don't you know, I hope, I mean, I know you guys, you know, you're trying to, sell the software and you gotta give the pitch. But like I said earlier, I mean, we gotta know what's out there so we can tell, hey, look, we've sat through several of these now, we think this one, you know, here's the bells and whistles on each of them.

--- Purchase decision ends ---

TROY

2:12:06 But overall, this looks like it's better than the other, you know, without knowing any of that, we're in the dark. We truly are, we just it's like, all we know is what we've got right now and, you know, it's...

TROY

2:12:20 Yeah.

MATT

2:12:22 It's my favorite. My favorite saying is fish in the water doesn't see the water. So, when you've been living in it long enough, it's just your normal life. It's just is what it is nothing else out there. So, this is the first step. And, and like I said, I've already predicted what your challenges are gonna be. So don't worry. I don't have high expectations of this right now.

--- Purchase decision ---

MATT

2:12:44 So don't feel like you're hurt my feelings if now it's not the right time or you wanna look at some other stuff. Don't worry about that. Like I said, I wanna be here as a resource for you guys when the time is right? If that's not now, that's fine. If it's in the future, as long as you guys saw the value in this today, you let me know when you want to continue the conversation. I'll be there for you, okay? Right?

TROY

2:13:05 Yeah, we definitely, yeah, it's been if anything is educational too to see things like, you know, where there's something out there. Yeah, you can see, you can see it. I can.

--- Paper process ---

TROY

2:13:28 We're just here.

TROY

2:13:30 I see the water.

TROY

2:13:32 I...

MATT

2:13:33 Don't...

TROY

2:13:35 You you...

MATT

2:13:37 Okay.

TROY

2:13:39 So here. Yeah. Well, and my goal is, you know, I gotta make everybody wanna come to work. It's like if it comes to work, it says my job, it got easy. All of us easier is still a job. Yeah.

MATT

2:14:03 That's...

TROY

2:14:04 If she gets to the point where it becomes a headache.

TROY

2:14:07 What's going to happen?

TROY

2:14:08 She's going to be like, I don't want to be here because it's a headache, you know, and it's a job. Everybody knows it's work, but you gotta be able to sit down and have the tools to do it without, you know, going, hey, this guy didn't do this. This guy didn't do that.

--- Paper process ends ---

MATT

2:14:23 Somewhere out there, there's probably a competitor that's working a little smarter, a little less harder. And if there's not yet, it's gonna happen. So that's a great way to lose your best talent, your best customers. So it's really, it's also, you know, like I said, you can do a bad job and still make money, but with the competitive landscape that's only going to last so long before somebody comes up in an Amazon, your market or netflixes you guys or, you know, ubers you guys and disrupt the industry.

--- Purchase decision ---

MATT

2:14:54 So it's about future proofing. Your business is about getting out in front of it. You may not feel like you need it today, although you guys do feel like you need it today, but the owners may not feel like it. So now's the time to act before it becomes an even bigger problem.

TROY

2:15:09 Yeah, yeah. We appreciate your time for sure. Definitely learned a lot. I would, if you want an honest opinion, I think this is, a definite for runner over BuildOps for sure.

TROY

2:15:20 Yes, I would agree.

TROY

2:15:23 Yeah, I.

TROY

2:15:23 Think all inter.

TROY

2:15:25 I think it's laid out.

MATT

2:15:28 It means a lot that's a win in my book. I don't usually know what's going on with BuildOps and you guys don't have to say that just because you think I wanna hear it, but...

TROY

2:15:36 No... certain IP.

TROY

2:15:41 Think there's functions here that will be a lot more benefit.

TROY

2:15:46 Yeah, yeah. I think when you and I talk if it's more service company oriented?

--- Type of work ---

MATT

2:15:53 Yup. And that's what we talked about last week, Troy, is they're kinda their claim to fame? And what is appealing to some contractors is they're trying to do a whole bunch in one platform, you know, the jackobal trades master of none, and they're a lot more Construction focused.

--- Customer engagement ---

MATT

2:16:09 So for customers that are taking their service department seriously and want to hit the gas on efficiency and driving more revenue that's our playbook, we're just after commercial service operations. And so all of our R and D all of our focus is right into this. You know, this best of breed application and we're just constantly striving to make it better.

--- Customer engagement ends ---

MATT

2:16:29 So, I'm glad that comes out in the software and you guys are able to see that difference. So thank you for that. Okay?

TROY

2:16:36 I think, right. Well, we'll definitely be talking long, Richard and I, I'll try to get a lease to Bush I, to do the walk through it and then say, see this is gonna help us, you know, is gonna help us, you know... we don't have the stone, my wife. She said you guys.

TROY

2:17:15 Kids make none of us.

MATT

2:17:17 No.

TROY

2:17:18 For sure. I guess.

TROY

2:17:20 Yeah, we're real good at fixing the air, conditioners, not so much with the technology to get us out there now.

MATT

2:17:31 Yep. Well, you don't have to do it alone. That's what we're here for. So again, you guys let me know how I can serve as a resource we'd love to get you into, the modern day and, you know, have my contact information. So like I said, I'll send you that recording, reach out if you have any other questions or if an wants to set up a meeting. Okay? I'm here. So thank you again for your time for the great questions of being engaged and don't be a stranger.

TROY

2:17:57 All right. Talk to you later then. Bye.

The End