GONG

ServiceTrade Demo with MECHANICAL 24

Daniel Geary with MECHANICAL 24
Recorded on 9/14/23 via Zoom, 1 hour 28 min.

Participants

SERVICETRADE

Daniel Geary
Territory Manager

Jace Stephenson
SDR

OTHER

Louws

Shaun Louw

Topics

Transcript

LOUWS

0:00 Hey, Danny. Can you hear me?

DANIEL

0:01 Hey, good morning, Shaun. How are you?

LOUWS

0:03 Good. How are you doing?

DANIEL

0:05 I'm doing well. I'm doing well. Thanks for taking the time to meet with me.

LOUWS

0:09 Yeah, absolutely.

DANIEL

0:10 How did the, thanks for letting us know about the job that you had to head off to this morning? How did that work out for you?

--- Type of work ---

LOUWS

0:17 Yeah, good. You know, nothing ventured, nothing gained, right? So, you know, we'll see, you know, in our industry, nothing is really ever... you know, on the spot, you know, it's a long sales cycle. So we'll see what comes of it.

DANIEL

0:38 Nice. Were you out bidding like a new proposal for, some maintenance work or looking at like installs?

LOUWS

0:44 Yeah, looking at, well, just meeting with a client to see if, you know, our model will work for them, you know? So we have a pretty unique service model that, you know, is... you know, basically geared towards chain locations or?

DANIEL

1:09 For...

LOUWS

1:10 Maintenance and then response service. So, you know, it's a little different to your... day to day mechanical service company, you know? So we really take a point of ownership of our accounts, you know, and sell a full package service where we're managing, you know, their schedule of maintenance, and doing asset tracking, so that it really, you know, takes it out of their hands and, you know, gives them the ability to go.

--- Type of work ends ---

LOUWS

1:46 And do, you know, whatever they do, you know, sell burgers or coffee, you know, whatever their business is, you know?

DANIEL

1:55 Yeah. I saw that on the website when I was just looking into the company about the services to offer, but it also looks like you put some special care around the customer needs and also making that recommendation of if you're gonna work with us, you should be on a PM agreement.

--- Type of work ---

DANIEL

2:10 That way your equipment is always up and running, and you're not worrying about calling us was the gist I got, from your messaging on the website.

LOUWS

2:18 Yeah, exactly. And then, you know, what we have done as well as we have gone exclusive. So... only customers that have maintenance agreements with us. We will provide emergency service too. Okay? You know, if somebody, if you know jacks coffee house, you know, calls in and says, hey, I've got my walk in freezer is down, whatever it might be, and he has no maintenance agreement like, well, sorry, Jack, you know, we can't be there unless you have a maintenance agreement with us. You know, we can be there on Monday or Tuesday during regular hours, but, you know, we only do response service for people that have maintenance agreements with us. So... and generally, you know, if you know, they either tell us well, you're nuts, you know, sorry for you or? Okay. Yeah, we'll get service on Monday and then we'll sign up with the maintenance so we can get that emergency service, you know?

DANIEL

3:25 Sure. So, it sounds like, you know, your customer base, you know, the exact client that you're targeting is that, yeah. Okay. Yeah, which is not usually the case with a lot of people.

DANIEL

3:36 When I asked that because that is important. It's part of our messaging is really understanding who your I CP is customer, right? Who your I CP customer is, because we feel like software can really tailor the need if both ends have the same vision. Which, a lot of what you're describing is how we try to sell and pitch service trade to our customers, right?

--- Type of work ---

DANIEL

3:57 It's all about having quality revenue. And what you described is quality revenue, having customers under maintenance contracts where it's now guaranteed quality revenue. And you're not chasing and relying on service calls from random mom and pop shops to keep you guys busy day to day.

LOUWS

4:15 Right. Yeah. So, you know, if you wanna make any kind of comparison, it's sort of like, the costco model, you know, where we have, you know, if you want to consider our maintenance plan, the membership, you know, and then demand services is the product that, you know, they go, the member is going into the store to buy, right? Sure. So, so yes, we are in our locations at least two times a year for maintenance, you know, and then four times a year for, you know, that exclusive member, you know, to make sure that their equipment is up and running and kept in a, good state so that when they do have a breakdown, you know, and most likely it's a catastrophic breakdown, you know, which leads to either, yeah, it's gonna be a major repair or it's gonna be equipment replacement, which, you know, we have, you know, which we're currently keeping track of, you know, just on a spreadsheet of all equipment, that is, you know, above 10 years old, and then the critical equipment that is, you know, beyond now be coming into it's, end of service life, you know, 15 years and above that we can provide a list to our customers saying, hey, you know, we, this is on our watch list.

--- Type of work ends ---

LOUWS

5:54 You know, we suggest replacing this before you have catastrophic failure. So, you know, so we've you know, and I was telling Jas that a lot of softwares that we've looked at... have great features. You know, you know, we've kind of settled for the software that we're on right now... and, you know, if we kinda joke like in our office that all of you service software companies all are like in.

DANIEL

6:30 Cahoots.

LOUWS

6:30 And like have you all have great features? You know, that you, you're all keeping separate, you know, so that you can all, you can be in business, you know, but to your great features?

DANIEL

6:46 And put them.

LOUWS

6:46 Together, you would have this awesome software that, you know, we could all use and be phenomenal you know?

DANIEL

6:55 Is, have you heard of service trade prior to today's? Meeting? Have you?

LOUWS

7:00 Well, no, just, you know, Jas got my attention. She just happened to catch me, you know, and, you know, really, you know, easy to talk to and she kinda, you know, got me on the hook there.

DANIEL

7:19 Yeah. I was amazed. I'll say Jason is newer with the team but she's really taken on a lot to learn the industry and service trade, and who service trades I CP customers are. So I thank you, for your time of willingness to speak with her, and I was really excited actually after speaking with her to meet with you because a lot of what you discussed is where service trade core values are. So, you know, with ServiceFusion, my thought process there is, you know, your… average commercial contractor that's growing and scaling at a reputable rate. They typically outgrow ServiceFusion within like a year or two of actually using them. Right? Then all the work around start coming into place. Is what I found for me. I'm a former technician myself. So I have the experience of, I've been in the field as a tech for about eight and a half years as a licensed electrician. Only reason I'm not doing that anymore in my family business is two major shoulder operations. So I couldn't even pull 14 four out, in the field for more than like two hours out being in pain.

--- Type of work ---

DANIEL

8:20 So, you know, I do have a unique understanding of being a field tech, being the person in the office running the books and all the projects, but also seeing where software can come into play. And so with ServiceTrade, I wanna preface, you know, we're specific. We're one of the very few software platforms that are specifically built for commercial service contractors.

--- Type of work ends ---

DANIEL

8:40 And I say that because we don't take in like a long care company or a pool company, or a pest side company. They just don't match our workflows. What they need is not what we offer. We offer a specific set of tools and skills to our contractors so that they can grow and scale year over year.

--- Purchase decision ---

DANIEL

8:58 So, you know, with that said, you did mention a couple of different things. You mentioned, you looked at software quite a few times kinda came to the decision that we haven't found the right fit. Let's just stick with ServiceFusion and continue with workarounds.

LOUWS

9:12 Yeah. It's you know, it's kind of a multiple software where it's... you know, the platform is basic enough that we can go in and, you know, and we're savvy enough with excel to know how to manipulate, you know, excel spreadsheets that we can input into ServiceFusion for to do what.

--- Accounting integrations ---

LOUWS

9:39 You know, we're looking for it to do as well as exporting out... CSV files to and manipulate those. You know, I have to do what we need to do. But, right? A lot of it's a lot of manipulation. There is only myself and my GM that knows how to do that. So then having to relay that to our, you know, our front office people, and then our accounting and billing and it, it's kind of you, it's organized disaster, you know?

--- Accounting integrations ends ---

DANIEL

10:24 Be transparent. It kinda sounds exhausting, right? Just to be, and just the way you're describing it, I'm here, you take the deep breaths in between having to manipulate the data and having to pass it to this person.

LOUWS

10:34 Yeah, it is. But, but the thing, is that it works Danny, you know, it works, you know, we're you know, very successful company.

--- Accounting integrations ---

LOUWS

10:44 You know, the operations are, you know, somewhat seamless... and, you know, the, you know, but, you know, I'm at the point now where, you know, okay. Do I hire somebody else, you know, to come in and just sort of manage, the software, and, you know, know, manage these spreadsheets or do I make the jump to, a software?

LOUWS

11:15 But, you know, the software has to be seamless enough that it can do all these things, you know, from a basic click point view, to do it versus, you know, having hiring another warm body to come in, and do this, you know?

DANIEL

11:36 Sure. Yeah. And, and I hear that a lot, right?

--- Assets ---

DANIEL

11:40 And so... I guess my question to you is you mentioned looking at a bunch of software, if we could tie functionality from a B and C into one platform that would be great. So, what is, what are those critical components that you guys look at? Whether it's technician visibility or just ease of use to fill out work orders, tracking PM agreements to be able to see all the equipment that we see at a location and making the best recommendation, to the customer as far as next steps, speeding up our invoicing?

--- Assets ends ---

DANIEL

12:13 Like what are some of those workflows and procedures that you would, you know, I need to see that to even recommend this to other people on my team.

LOUWS

12:22 So, just off the top of my head to name a few would be like... data tag... capture. So, you know, the, I, in my mind, it's it kinda is easy but I don't know how it all gets programmed.

--- Access to information ---

LOUWS

12:47 But our phones have the ability, to capture, the text on a picture, right? So why can't the phone or the app just automatically use that technology in the phone to capture all that data on there? And then say, okay, I've got this data in the, this data is already in the software because remember a lot of our clients that repeat clients.

--- Assets ---

LOUWS

13:20 We don't we're not just the one and done contractor. We're going back there repetitively working on the equipment multiple times throughout the life cycle. So, you know, we wanna be able to say, okay here's, rooftop unit number one, picture...

data is captured and then tag to that service call or that maintenance to say, okay, well, this piece of equipment, this RT, number one has had maintenance, you know, on, you know, for visits throughout the year.

LOUWS

13:59 And then, you know, throughout that year, yes, we had a service call on it as well. So that it would be a matter of, you know, me, I'm you know, owner, account manager, whatever hat I'm wearing, right? I can go in and say, all right, well, you know, sir, your, or to number one has had its regular maintenance.

LOUWS

14:20 We've also noticed you've had some service calls... and be able to click, and produce a report relatively easy off of that equipment. And then, you know, the software is tying all of these... things together from the service tech, you know, who's out there taking the picture of that data tag put in his work order, what he's done to that piece of equipment. And then, you know, same on the office side for billing to say, okay, we've build out all of this that ties to that piece of equipment, right? And then same with estimates. So, you know, estimating. All right, you know, the estimating girl is generating estimates tied to that piece of equipment.

LOUWS

15:16 And then it'll you know, it's all kinda coming together, right? Sure. So, so that, so I guess, yeah, I mentioned a whole lot of things right there, but.

DANIEL

15:26 Talk about that.

LOUWS

15:27 Yeah. It all starts with capturing that, you know, that data tag right? Right now. We have a person in the office who is looking at the technicians picture, going into the software, having to look at a drop down menu of all the equipment on that site, tagging it and then continuously tagging it to each estimate invoice, you know, so on and so forth, right?

LOUWS

15:53 Yeah. So that's just one feature right there. Why can't, I know there one service software. I think it was BuildOps. They said they could do that. And yeah, then another feature would be... on the service side of on the Van side of it, you know, to have inventory management of, you know, when a tech is a tech is assigned to a job,

right? He's driving his truck. Now... you've been an electrician, you know? So, you know, that moving a technician from a truck to truck is a huge task, right? So.

DANIEL

16:48 I always have the same fan. So I was fortunate. I had the same truck every day. I brought it home. That was my baby, but.

LOUWS

16:53 Yeah. Right. Well, that's how we operate too. So, you know, and the majority of companies, I don't know that, that's how they operate as well. You know, it's a huge task to move a tech out of a Van, right? Unless there's something wrong with that truck or anything, he's gonna be in that truck. So that's his warehouse, right? So that truck is stocked, you know, we have a stock list that truck has. Now, if that tech is assigned to that job... how come softwares cannot, you know, and maybe they can, maybe service trade does realize that when it comes to billing it's, getting taken out of that truck. You know, we've used that stock part that is on that truck. It should be taken out of there. Now reduced from inventory, put into a purchase list for re, inventory. And at the end of the day, we should be able to spit out a report saying, hey, we've used XY and Z, we need to reorder or we need to restock out of trucks, you know, out of our warehouse inventory to restock that truck, you know?

DANIEL

18:11 That anywhere today, like in an accounting software, are you tracking inventory at a whole at an individual warehouse level?

LOUWS

18:20 Yeah, we are, so ServiceFusion has the ability to do inventory but it's it doesn't work, right? You know, it's, very user... driven. So if one person makes a mistake on either capturing the inventory into the warehouse, then like, so we do, let me just back up here. We we buy bulk inventory, okay? To get the best discount on that. So we buy that and we put it into our shop stock. We have the guys come to the shop once a week to do truck inventory, and then they replenish out of that shop stock. So, so we have, you know, one, we have one inventory intake and then we do, then there's a balance from that initial intake into our shop stock into each one of those trucks, right?

--- Parts management (inventory) ends ---

LOUWS

19:34 Sure. Then the truck goes out, does this thing. And now is, you know, put out into the field or, you know, build out. And then right now ServiceFusion has the ability to do that. But, yeah, like I said, if somebody doesn't input that correctly, it gets all jacked up.

--- Parts management (inventory) ---

LOUWS

20:00 And then we don't know what we have. So right now, we are literally doing it on a shared file through Google excel spreadsheet, that is a physical inventory. Once a week of what we have in the shop, then the guys come in, they do inventory, and then it's cross reference to the spreadsheet. So a lot of labor, right?

DANIEL

20:35 Yeah. So, you know, with that, you guys have just like a just a main warehouse guy parts guy that's responsible for all that or is it tied between a couple of different people as far as filling, you know, where at this amount of capacities, we need to go ahead and get to our minimum of 100. Is there one person that manages that?

LOUWS

20:57 Yeah.

DANIEL

20:58 Okay.

LOUWS

20:59 Yeah. Well, so, yes, there is. But... but billing is ultimately depleting everything, right? So... but if it, so, Katie is, our shop, you know... inventory manager. Okay? So if she is not inputting everything in real time, okay? And then Rick is billing everything out and she has not yet taken it in.

DANIEL

21:37 Put it into the.

LOUWS

21:38 Shop and then allocated according to the vans for, you know, what the technician has filled out that he's taken from shop stock and he's ahead of her... it's a disaster. Yeah, we...

DANIEL

21:56 Negative.

LOUWS

21:56 Inventories that, you know, we have no idea where we at, we, you know, I get alerts from the technicians saying, hey, we're out of this, you know, so, so, yeah. And then what we've ended up having to do is carry additional stock, you know, but the system because Katie has been backlogged, right? Yep. She's not keeping up with the inventory input... our system showing negative, then we end up with a whole lot of extra shop sock, you know, right? We have extras of, you know, one thing and then we're out of another, you know? So, so, yeah, if there was a way for a software to keep track of, just, okay, we've started. So we started here with, you know, all this stock, right? And then we've input it into the truck. So now everything is full, right? And then as that is getting depleted, it is realizing, hey, you know, I need to create POS or I need to create, a reorder because, you know, Anthony and Sean used contactors off

their trucks, right? I need to create a reorder for those parts or it should, you know, hey, in a perfect world would be smart enough to say, you know, what? I've got... 20 of them in the shop, you know, should I, you know, send out an alert to Katie to say, hey, you've got 20 of these in the shop. You probably don't need to order any because you're not down at your reorder point, you know, we should probably pull from shop stock to put back on the trucks, you know?

--- Parts management (inventory) ends ---

LOUWS

24:02 So I don't know, I don't know if there is something that is smart enough out there, you know, how does Amazon do it or?

DANIEL

24:13 It is, well, let me just say this. What I've heard is you guys are looking for a way...

DANIEL

24:23 To benefit from your technicians, not just performance out in the field but their data input, right?

--- Assets ---

DANIEL

24:30 It should be easy for them to say here's, what I did here's, the equipment I worked on as I'm working on that equipment, it'd be nice for my guy, to snap a picture of hvac roof top one that he swapped out like a passer on and it'd be there for the office to see on that job itself without them having to manipulate the data.

--- Assets ends ---

DANIEL

24:48 Essentially, that way you guys can look at a job and say here's everything that was done. Let me just make sure the information is right, and then create an invoice without having to do a whole bunch of steps in between. Is that fair?

LOUWS

25:00 Yeah, it's you know, I think that, it should be able, it should be that easy. Yeah.

--- Parts management (inventory) ---

DANIEL

25:06 Sure. And then, you know, to add another layer to that. If you're able to see what parts are being consumed from each technician Van slash warehouse, it's critical to have that information in real time, right? Because to your point, if there's a delay in handing in a work ticket, that job gets invoiced, but in the park department

doesn't get that till three weeks later. Now, your inventory counts are off because there's no real time data that's another component that you're looking to have. So if I gave that to you today, would you sign?

LOUWS

25:38 Well, there's price as well. We have to consider.

DANIEL

25:42 Say that. I say that in joking but a serious manner.

--- Parts management (inventory) ends ---

DANIEL

25:45 Everything that you've explained to me today is nothing that's outside of our wheelhouse and nothing that I have to say crap. I'm gonna have to go try to find a workaround for this. This is all decent rudimentary functions in service rate and this is stuff we promote. So again, I wanna be clear, we're not the software that's gonna paint a picture. And then you go into things and it's not what it looks like. I'll give you a hard know if it's not something we can do, but everything you described is really what I talked to people about on why our customers are successful, and you really hit the nail on the head there.

--- Access to information ---

DANIEL

26:17 So I do want to reiterate all that functionality is gonna be available for your field technicians. And then what we see is a benefit of that. Is now your office is less strained because they have all that workflow that's kind of put in place where it needs to be based on the technician record fill out.

--- Access to information ends ---

DANIEL

26:34 And now they can focus on what they need to do, send out more quotes or look up whatever does they need to do instead of doing a lot of that double data entry. Is there anything you know, I want ahead? I really appreciate all the info. It's super helpful. Is there any other pressing, you know, feature or matter for you before, you know, I jump into my end here.

LOUWS

26:55 The, the biggest thing about... if we were to proceed would be the implementation part of it, you know, it would, we would definitely have to do like, you know, just to be completely upfront with, you know, there's no way that I could convince my team to switch a software unless we have done field testing. Okay? So we would have to do real life, you know... field testing on the software, you know, run it through a period, of time to see, you know, how is this, how is the software gonna fit...

DANIEL

27:43 Into our workflow?

LOUWS

27:45 Do we need to amend our workflow or to, you know, do we have to manipulate the software to fit into our workflow? So, you know, so just, yeah, just to be completely upfront with you that, you know, is something that, is a real thing. You know, you know, we're not the biggest company, you know, we have, we currently have 12 technicians, you know, and five office people. But, you know, we have a very close knit group of people and, you know, who are all making a lot of money and are very comfortable with what they're doing. And if I disrupt that at all, I'm going to have a mute on my hands, so.

DANIEL

28:32 Have a legitimate reason why you're disrupting that?

LOUWS

28:35 Yeah, right. If it means that, hey, it's gonna make my day to day life easier and it's actually gonna work... then. Yeah, like, when I switched to ServiceFusion... I had like three people ready to quit.

DANIEL

28:55 It's never gonna work by Blake.

LOUWS

28:58 You know, and like, yeah, you talked to them today and like, yeah, wow, yeah, it's I can't believe it worked out, you know, kind of thing.

DANIEL

29:11 A lot every day.

LOUWS

29:12 Yeah, right. So, so, yeah, but yeah, very interested to see what you have to show me today. You know, another thing that, you know, I am interested in is your, you guys have like Geo fencing, right? For service areas? Is that, am I right on that?

--- *Tech time tracking* ---

DANIEL

29:39 Yeah. So that's kind of a loose term, when you say Geo fencing, what is your expectation of what Geo fencing is?

LOUWS

29:48 Yeah. So, I just realized when I said that, that's more, you know, I've been dealing with a fleet tracking company as well. So that's more of a tracking terminology, I guess, but it would be service areas that the technicians are assigned.

--- Tech time tracking ends ---

DANIEL

30:10 Yeah. So we can map out different regions in service trade, you call those regions. And so you can like have technicians broken out into different regions. Like if a service call comes in, the dispatcher would see, hey, that's John's territory. If he's not available, then you can go ahead and send Phil. And then, yeah. So that's how we track that, set that up. That way. Is that, was that aligning with what you were... projecting or thinking that the Geo fencing was?

LOUWS

30:39 Yes, exactly. Yeah. So, yeah, just in my research of your product, that's what, you know, one thing I was like, okay. Well, that's one of the tasks, you know, that.

--- Tech On-site ---

DANIEL

30:52 To that is if a technician clocks into a job, they don't see this, but the office would see this. Let's just say I'm over here at costco, and I say, hey, Sean, I'm here going to start my work. They clock in. Well, if they're not actually at costco, there may be a mile down the road at mcdonalds.

--- Tech On-site ends ---

DANIEL

31:08 The office work order gets flagged to say, hey, he's actually not there. He's he's a mile down the road when he clocked in. So, you know, you'll have some kind of checks and balances to make sure that when a technician says they're somewhere, the office can actually see that legitimacy as well as knowing if I need to dispatch a call, who's the closest technician, you have that different line of site.

--- Tech time tracking ---

LOUWS

31:28 And how does it know that? Is that, is that by like a?

DANIEL

31:32 Yeah. Just through the phone. So it's just a service. It's gonna be any time a technician, it's only when they clock, into the job itself. So we're not tracking their phone when they're not using service rate or not clocked into a job, there's no privacy thing there. They have to initiate the clock event for the, to register their location.

--- Tech time tracking ends ---

LOUWS

31:49 Okay. All right. And then do you plan on showing me like a service call simulation of, yeah, from like tech point of view and office?

DANIEL

32:04 Yeah, that's exactly what we'll do. I'm gonna give you a quick background on service trade kinda highlight in five minutes, a little bit less what we talked about.

--- Tech On-site ---

DANIEL

32:11 And then what we'll do is we'll start out in the field. We'll complete a job from the service technician point of view. And then we'll go back to the office and see exactly what information was mapped over, how you guys review that, and then take next steps, whether it's maybe I got to order parts.

--- Deficiencies ---

DANIEL

32:25 Maybe I have to create a repair quote because a bad compressor was found during this inspection and then invoice. So there may be multiple steps that happen. So we'll show you how service trade automates all those triggers to let your sales team or office know that these things need to happen. This job was just completed.

--- Deficiencies ends ---

LOUWS

32:41 Okay, cool. Yeah, I'll stop talking and let you do a thing then.

DANIEL

32:44 So feel free to interject at any time. A place that I like to start is just telling you who we are. So service trade, we've been in business for over 10 years. We specifically work in the commercial industry. And the only two contractors, I work with our mechanical fire and life contract, fire and life safety that's it, we manage over 30,000,000 assets. We've got over 1,300 active accounts as of today. And we've invoiced seven point 5,000,000,000 dollars in revenue last year. So again, companies are coming to us looking for a solution to continue to grow and scale their company. But a lot of things that we hear is a labor shortage, right? And so, a lot of things come with the labor shortage. But what we found is, you know, over the next three to four years with the people retiring and the folks that have just lost interest, in the trades itself, we're seeing about a, an eight percent net loss which is a good and a bad thing. Because what that means is that over time there's going to be more demand for work, less skilled labor. So companies are always saying we've got more work than we can handle? Would that align with what you guys have come across maybe over the last couple of years?

LOUWS

100 percent. Yup. What is the average size of company that you guys have in your client to?

--- Pricing ---

DANIEL

34:02 I would say the average size would be somewhere in the... 10 to 20 tech range, right? That would be probably, our middle share. We've got text companies that have 500 technicians, and we've got companies that have five technicians. But I'd say a medium threshold would be probably 10 to 30 would be fair.

--- Customer engagement ---

DANIEL

34:24 Let me bump it. And so, you know, you hit the nail on the head here, right on who your customers are. I was gonna ask you specifically, do you know who mechanical 24 customers are? And you paint the picture, you guys know exactly who you go after and you set the expectation, of what that customer can gain from working with you guys.

--- Customer engagement ends ---

DANIEL

34:45 So we start with controlling costs, right? So technicians, the most strained resource you guys have, our goal is to simplify the process as far as their job is to go out and get the work done, but they should easily be able to access a location, see service history.

--- Assets ---

DANIEL

35:01 Maybe I got a service call on rooftop one, I wanna see if somebody was here two months ago or yesterday, what did they do? So they'll have host service history to be able to make that next... troubleshooting idea without calling into the office. The other piece of that is they can easily fill out time material, snap before and after picture, attach those pictures to the specific piece of equipment they're working on, gather customer signatures and then even fill out like a checklist.

--- Tech On-site ---

DANIEL

35:28 So maybe you've got your work order, but I've got a checklist or a task sheet that needs to get filled out alongside of that. All that is uploaded out of the technician work order. So that way they just go in, they have what they need. And once they clock out of the job, the office is notified that says, hey, we've got a work order that's been completed and needs to be reviewed.

--- Deficiencies ---

DANIEL

35:46 So again, that would be notified of the office instantaneously. And that goes back to you guys. Once that job is done, it's our goal to give you guys key visibility on next steps. Do we have to order parts? Do we need to go ahead and recommend an uplift on this equipment?

--- *Customer engagement* ---

DANIEL

36:00 Do we just have to invoice that, right? You guys will have a centralized location for all of your contracts, service calls and even retro fits that you guys are performing throughout the year. And it's always our goal to get customers to grow more contracted work? Because what we find is during those PMS deficiencies are found, repair opportunities are found that equate to higher quality revenue.

--- *Deficiencies* ---

DANIEL

36:24 So with that being said, if you guys on site finds a bad compressor on rooftop one. How is he notifying the office with the information that he gathered? So that way your sales rep can go ahead and generate a proposal to your customer.

LOUWS

36:38 How's that done right now?

--- *Dispatch* ---

DANIEL

36:40 Yeah. How do you guys do that now?

LOUWS

36:41 Well, there's a alert feature in ServiceFusion when work order is completed. Okay? It's called a flag, but the, it is user driven. So the, so the dispatcher, right? We have the dispatcher right now, UN flagging it and then creating a estimate, which then, you know, or a follow up work order.

--- *Dispatch ends* ---

LOUWS

37:13 So, yeah. So like we find that, yeah, if the technician doesn't flag it, you know, it's not caught until it gets to billing and then, you know, so it's like two or three days later, you know, that it's seen, you know.

DANIEL

37:31 Is that quote being generated in ServiceFusion? Do you guys have to go outside of ServiceFusion to generate the proposal or?

LOUWS

37:38 No, it's done in ServiceFusion, yeah.

DANIEL

37:41 Okay, great. So you guys are using that as your CRM once the quotes been initiated, the customer? Yeah. Okay. So, you know, that's a very important workflow for customers. Again, we more or less automate that, create its own identity. So that way you guys can always search for repairs to make sure, hey, it's Monday morning.

--- *Customer engagement* ---

DANIEL

38:01 We wanna see what came in Friday. You'll be able to search on that. So you never miss an opportunity to deliver more work to your customers. So again improving service operations, just giving you guys a full overview whether it's a contract, a specific job. You guys wanna know your cost, your whip, reporting things of that nature.

--- *Deficiencies* ---

DANIEL

38:17 All that lives inside of service, trade your technicians, you guys need a way to fill out an application in easy, you know, way to do so. So again, whether it's accessing service history, filling out time material, snapping a picture tied to a piece of equipment that's all done for your text out in the field.

--- *Customer engagement* ---

DANIEL

38:36 And at the end of the day, that will streamline the workflow for your offices. The other piece to that is growing customer profitability and loyalty. So, you know, we have a very strong focus of how are you guys engaging with customers, right? We have in route notifications, work acknowledgment, a post service summary that's attached to an invoice, so the customers can actually see everything you're doing, not just getting a number on an invoice that they need to pay.

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

DANIEL

39:05 Do you guys communicate and have outreach or customers now? Whether it's in route or just appointment reminders for upcoming services?

LOUWS

_{39:12} Yeah. So they do get a, they get a text message currently when the tech selects his status to be on route. Okay? So it is only one user though.

LOUWS

_{39:27} So whoever is the primary contact for that site gets that text message, gotcha. Okay. You know, where sometimes that causes a little bit of a problem because there are, you know, multiple managers for a location. So that, yeah, it's not really perfect. But that is one thing. Yeah, they get that.

LOUWS

_{39:57} And then, the only reason why we don't do any type of post report, you know, generated from the software right now is because our technicians capture receipts. So, like if they were to have to go by a part... they're taking a picture of the receipt, that part, okay?

LOUWS

_{40:27} That is within that work order. Okay? So the way ServiceFusion works is if you have it, send a work report of the post report, it sends all the pictures that are tied to that job... and then also send whatever the technician is inputted. So, you know, without being reviewed, sometimes the technician will put this manager is a dumb fat as, you know, we don't want that to get over there, you know? So.

DANIEL

_{41:01} Guilty as charged. Yeah.

LOUWS

_{41:02} Yeah. So, so that's like one thing like, you know, where we, we're not utilizing that feature.

DANIEL

_{41:11} Okay.

LOUWS

_{41:12} So, you know, we kind of use that work report for sort of internal notes and then invoicing, we'll take all that and then put it into, you know, the internal notes for the order, and then regenerate, you know, a description for the job, you know, that gets sent out on the invoice.

DANIEL

41:37 Gotcha. Okay. Yeah. I mean, so you'll have some different opportunities to leverage that information, whether it's, the service tech sending a post summary port or the office doing that. Once all the information has been reviewed and maybe tweaked a little bit, you guys set the threshold of hey, you know, my tech gathered 25 pieces of information on today's job, but when he leaves, we just want them, the customer to see portions AB and C. So you preset, you know, what information is gathered and then what's retained internally, and what's always turned on for the customers. And then you can override that, as needed. But we just always have a strong press preface of, you know, show the customer what you're doing, just don't tell them right? It's it's a big thing and what, we kinda. So again, there's multiple ways to be able to communicate with customers. And at the end of the day, you know, our customers are seeing about a 30 per seven growth in revenue year over year, and that's our top 30 percent customers. Our bottom tier customers see about a 10 to 12 percent growth in year over year. And those are companies that aren't really utilizing the platform the way it should be, and they're still seeing an immediate impact. So, you know, that's a little bit about service trade. I think what I'd like to do is I mentioned we're going to go out in the field and show you the workflow for your field text. So let me go ahead and just minimize one of these screens here. Pull this up.

--- Access to information ---

DANIEL

43:09 So with service trade... when you log in for the day, as the field tech, you can service trade by the way is an application you're gonna download on your iOS or android device. So as a field tech, I'm gonna see all of my upcoming jobs for the day.

--- Dispatch ---

DANIEL

43:24 Now, depending on how you guys schedule, you can release jobs, job by job, day by day, you may have lead texts that you let them assign certain jobs themselves. So there's different avenues where again, if you've got a, you know, lead text that got done early, they can assign themselves to jobs.

--- Tech time tracking ---

DANIEL

43:43 You can also set up your technicians day, hour by hour, right? It's all up to you and the options that you guys have. But for this particular job where a Weber ham, once an academy, it's a service call. But down below, there's a couple of different clock events that we have, right?

--- Tech On-site ---

DANIEL

43:58 So I sent you an in route notification just to let you know that, you know, Sean I'm on my way and my GPS says this is the time I'll be there. But if I've got to let a few different people know, I can go ahead and do that, right? So I'll send that and I'll head out on my way. Now, once I'm on site, I'm just going to let you guys know that I'm done traveling. I'm here for today. So under the job different description here, this is where we can see, we've got a service call, the administrator's office not going down.

--- Recurring maintenance ---

DANIEL

44:27 So this is where the text vantage points come into play. Okay. Under services, this is the window on. Why am I'm here to work? So a couple of different things. I set up a service call for today. I should have set up a PM after I spoken with you, which I'll show you here in a minute.

--- Assets ---

DANIEL

44:43 But the important key is if I've got five or six different units I'm working on, we're going to have six services on here. So that way again, your technicians can come in and say, hey, I'm working on this rooftop. Cool. Danny. You just got there, show me a picture of what it looks like before you even started working on it.

--- Deficiencies ---

DANIEL

45:02 There you go. And I can add notes that before. So here's again where technicians, they can put in any attachments, any comments a deficiency? This is letting a technician know that somebody was here on September fifth and found a bad compressor well as that technician. Maybe it was somebody else that was there. I can go see what pictures they took, any comments that were made, but the point is for every piece of equipment that you guys maintain, you have a Rich record of data sets for that unit. And then...

LOUWS

45:37 I sorry. So deficiencies are issues, right?

DANIEL

45:42 Correct a deficiency is a repair opportunity that was found or made by the field tech that's...

LOUWS

45:49 So recommendations.

DANIEL

45:50 I guess, yes, recommendations as well, definitely. And you'll see there's a couple of different severity levels that you'll give the sales team when you're creating this report. But so again, under services, this is just gonna tell me why I'm here. What I need to do under attachments. This is where I can just start taking pictures of if I don't want to attach it to the equipment. Maybe I just want to give a quick recap of what happened on the job so I can either take a picture, take a video or my favorite record, an audio mama. I hate typing things out. Hey, Sean just wrapped up this inspection. I found a bad compressor on rooftop number one. I've already reported that back to the office. Other than that, everything went well, moving onto the next job... I can save that, right? If I don't like that, and I want my text to actually put notes in here, then I can haven't, come to the comment section, put a note on the job and use the talk to text feature. So instead of typing it all out... I can just use the talk to text feature to describe what I did today. And now that comes over on a note on the job itself. The beneficial thing there or when you have that option, guys are more likely to fill out information in real time instead of waiting to get back to the Van or typing it all later.

--- Deficiencies ends ---

DANIEL

47:10 That talk to text feature is really valuable in a lot of the key attributes here on the mobile app. So we've got services. We've got attachments. Job items are key, right? You guys wanna know time material for this particular job. So here's where I would go ahead and enter in that time and material.

--- Accounting ---

DANIEL

47:27 So does your inventory live anywhere? Like you said an excel sheet, is it in your accounting software or is it all?

LOUWS

47:34 Excel?

DANIEL

47:35 Okay. So what we would do in service trade is during the onboarding stage, you would send one of you know, your excel doc over to us and we would upload all of your... items into service trade.

--- Parts management (inventory) ---

DANIEL

47:48 So that way you guys can start pulling from the list of inventory they're using. So I can either scroll through that list or I can go ahead and say I had to use a capacity to make this a unit up and running.

LOUWS

47:59 Does it show pricing? Okay there?

DANIEL

48:02 It does. So tell me a little bit more about that. The pricing is that something you want them to see or not wanna see?

LOUWS

48:11 So, item cost is that cost to customer or cost to us?

DANIEL

48:16 That's the cost to you guys. Okay. That's the cost to the customer.

--- Access to information ---

DANIEL

48:21 So with the item cost, you can have this turn on or off. So it's either visible to just administrators or it's visible to administrators and field text or it's visible to administrators, field text and customers. Okay. So you kinda, who can see what level of visibility for you guys?

--- Parts management (inventory) ---

DANIEL

48:39 Got it. Okay. So again, I can easily let you know charters going here, I can easily let, you know, the part that was used, how many were used, the data was used on. And then we're also going to let you know where that comes from. So by default, typically it's gonna come from a specific warehouse. But if you need to manipulate that data, you can say great that came from Danny's Van or again, a specific warehouse. So ServiceTrade is going to let you know all of the items that were consumed on the job. So that way when it goes into invoicing, you'll see all the parts that were consumed on every job from every technician, a warehouse throughout the day. So go ahead and add any parts that I've used. And I'll also add my labor.

--- Tech time tracking ---

DANIEL

49:29 And this was for our hvac department, maybe have different labor rates for different divisions or texts. We can handle all that as well. So now I've just entered time material. I was there for two hours and I swapped out a capacitor. So those are really the key attributes that a technician really would utilize, day to day, right?

--- Assets ---

DANIEL

49:50 I come on here to see what I need to work on. I go ahead and take some pictures, videos, add some notes about what happened. I put my time material down

here. The assets window is pretty important because this is where we'll track every piece of equipment that you guys maintain for your customers. So as a field technician, even though I'm scheduled just to work on this piece of equipment, maybe the office had it wrong and it was actually rooftop number two. Well now I can look into this and I can see all the information tied to that piece of equipment. Maybe as the tech, I realized that the serial number is off. So let me go ahead and update that for the office. Now that the technician update the serial number. Now, service trade core gets updated on the customer account. There's nothing to do back for the admins. But the point is you have a Rich record of detail for every piece of equipment that you guys maintain.

--- Deficiencies ---

DANIEL

50:42 And then last, but not least our deficiency loop. So this is where I'm on site and I need additional services quoted out. I'll go ahead and add the description... found bad compressor on rooftop number one. Save it's gonna ask me to go ahead and take a picture of those.

DANIEL

51:08 And then I'll go ahead and let Sean know what I'm looking at. So, Sean, this piece of equipment is completely down, not getting any AC in the admins office. We need to replace parts AB and C. It's gonna take me four hours. Definitely gonna need a helper for the first two... save. So again, any piece of information, that the technician is gonna gather, we're going to go ahead and add that under attachments. The severity is kind of what you said, is it suggested? Is it recommended? Is it completely down, right? So the technician is going to have that authority to give you the best recommendation.

--- Assets ---

DANIEL

51:42 And then lastly, I'm going to let you know what equipment this is for. This is roof top number one. And I'm gonna save it if there's specific information you want filled out before I can log out of this, go ahead and set that up. So now it's not response.

--- Deficiencies ---

DANIEL

51:58 Now, your technicians, not nervous about what needs to be filled out. It's kinda set up for them. So now, as soon as I have done this, right, the office, the sales manager, whoever you have set up for this notification is going to be alerted that the customer there's an issue at a customer location with this piece of equipment. Let's review that report and get a quote generated right away. So there's really nothing more for anybody to do other than continue with their workflow?

LOUWS

52:25 How does it, so based off of those levels of deficiency? Does it, if you hit it as, you know, not working or critical? Does it alert any?

DANIEL

52:38 It's gonna alert no matter what your team is gonna be alerted of this issue. What they're gonna see is the severity rating. So we're never gonna not, you know, if this is a recommended repair. We're still going to let you know, hey, Sean, this repair was recommended but it's gonna be classified as recommended rather than severe and in operate inoperaable. So you'll always have visibility of this as I'm sure you would want fair.

--- *Assets* ---

LOUWS

53:05 Yeah, absolutely.

DANIEL

53:08 So, other than that, I mean, that is really how easy it is for these guys to fill out a work order. The other piece to this is that if you've got multiple technicians on a job, right? Maybe you've got 10 units here and you've got Danny and Phil, well, both technicians will work on this, your work order concurrently as they're working on the equipment. You'll see who did what, right? Because each technician is gonna go into that equipment, enter the information and then we're moving on to the next. So again, a lot of software force you to create like multiple work orders for a single job with multiple units. We're in service trade one work order.

--- *Assets ends* ---

DANIEL

53:44 It can be multiple days. It can be multiple units, multiple technicians working on it. You guys get one report at the end of the day to be able to review and take next steps ultimately. So, what are your thoughts on the mobile app? Any, any key takeaways you feel like it's pretty?

LOUWS

54:04 Yeah, I guess. Yeah. I, you know, I don't know. It always, it always amazes me what the technicians come up with for, you know, pros and cons and things. The initial thought was like, man, there's a lot. There's a lot of clicks, you know... places to click on to go... but yeah, I'm getting it, you know, so... the... we could just back up.

--- *Recurring maintenance* ---

LOUWS

54:42 So at the beginning of the day or at the beginning of the work order... you're going to services, right? So it's a service call, you're gonna click on services that's gonna tell the tech what he needs to do.

DANIEL

54:56 Correct. The services window is always the description of why I'm here. So whether it's a retro fit, a service call, a PM, the services window tells the technician or technicians what they're there to do and what equipment they need to work on.

LOUWS

55:10 Okay. And then if you go back, so, yeah.

--- Recurring maintenance ends ---

LOUWS

55:15 So I guess it's yeah, it's kind of in like... order of flow. So like, you start up at one or the top left corner, that's always your starting point, right?

DANIEL

55:31 Correct.

LOUWS

55:33 And then you kind of flow through, you know, if, you know, you have comments or deficiencies, or you kinda go down and then to attachments.

--- Assets ---

DANIEL

55:44 Exactly. My workflow here. If I was a technician using service trade, I'm on emergency service call to work on rooftop. Number one, first thing I wanna do is I'm gonna look at all the equipment we maintain here and pull up rooftop number one to see just the service history, right? So three clicks of a button. Yes. What are these guys doing now for that? Are they calling into the office or they calling other technicians, how they access service history now?

LOUWS

56:08 So it's done for them by the dispatcher. So, the dispatcher would go in and basically copy and paste all the service history, recent service history now within like a month or two of whatever has been done to that unit and then just put it into the description of the work order.

--- Access to information ---

LOUWS

56:31 Sure. But yeah, if a guy was doing it in the field, it is, it's pretty kinda difficult they have to go into like the account and then scroll down and go through all the work orders, you know, in order to find that there's no way in the app on the app side of it to break it down.

DANIEL

56:55 Piece of equipment. Okay. And is that something you guys want? Is that the visibility you feel technician should have?

LOUWS

57:04 Yeah, absolutely. Yeah. In order to, yeah, select, the asset, yeah. And then, you know, be able to see what all the work orders that have been done, right? And that's what I'm getting, that you can do that here?

DANIEL

57:20 Absolutely. Yeah, I can go ahead and choose that piece of equipment and I can see all the work orders. There's only been a new location. So there's only been one service call here. I can see any deficiencies that were reported, whether they're still open or they've been fixed, a deficiency being that repair.

DANIEL

57:38 And then again, I can click into that just to see what that technician reported, pictures, recommendation, so on and so forth. And then lastly any attachments. So if you got like a wiring diagram schematic that you feel helpful for the building or the piece of equipment, throw that on there. Because now I know if I'm you know, wiring up a motor, it's one, two three, not one, two four, right? So just different levels of visibility on that unit. And again, these guys can update that as they're working on it and it updates service rate.

LOUWS

58:07 Right?

DANIEL

58:09 But yeah, those are the key.

DANIEL

58:11 Like you said, you know, it's the services I wanna look to see if, you know, if it is a service call who was here last. And then I'm just gonna tell a story of what I've done, put my time material on. If there's nothing further, I'm gonna clock out and move on the next job. If I find a repair opportunity, I'll go ahead and, you know, alert the office that we've got some additional services, that need to get quoted out.

LOUWS

58:32 So, it's clocking out, completing it.

DANIEL

58:35 Clocking out, is clocking out, is it is technically not technically completing it, but it's letting you know that I'm done with the job today. So that being said, it's gonna ask you, are you done or do we need a return visit, right? So that way we can close out the job or keep it open for the dispatcher to know here's a return trip. So, what I'm gonna do is I'm gonna continue clocking out. I'm gonna say I've completed all my services for today. And as you can see here, we've recently implemented tasking. So if there's certain articles of information that you want the technician to capture every time before they clock out, you can set that up for like an individual to be able to see that, hey, I forgot to leave a note. Let me do that. Now, before I clock out of the job, it won't let them clock out. So you can either set that up or leave it blank where there is no automation, you trust them. They're gonna fill it out as needed. So just know you've got control to make sure that those guys are giving you the data sets they need before closing out that work order.

--- *Deficiencies* ---

LOUWS

59:38 So, like if they forgot to attach a photo, is that, do they not have to go back or can you just click that attached photo to take you to the attached to?

DANIEL

59:49 Yeah. So if it said, it's gonna say, hey, you can't finish clocking out. So it's just gonna come back into you're. Not gonna go back four times, but it's gonna take you back into this attachment area where you can go ahead and take that picture because you haven't taken it already.

LOUWS

1:00:04 Okay. But on that task list, that attached photo... that is not essentially like a link to go back to that screen, right? Or?

DANIEL

1:00:18 That's gonna bring you back to the attachment section. So instead of me hitting back three times when it's gonna say you can't clock out. So this is going to have a red X. And so it's gonna force me to add that attachment without going back, it's gonna take me right to the attachment window.

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

LOUWS

1:00:33 Okay. Can you show me that?

DANIEL

1:00:37 I may have to open up another job because I've already done that, but yeah, I can show that to you. Let me open up another job. Let me finish clocking out here.

LOUWS

1:00:45 Okay. Carry on with your.

DANIEL

1:00:48 I have a feeling that we'll be demoing this another time. So I will put that in my note to show that to you what that workflow looks like.

LOUWS

1:00:54 Okay. Yep.

DANIEL

1:00:55 But again, we're done here. There's nothing more for me to do as the field tech. And so now it's all up to the office to take those next steps. So back in the office... there's my service call job. I just need to move my microphone. We're now looking at that job that I just completed as that field tech. Okay? So it's still in Progress because we need the office to give it the final okay before an invoice goes out. So down below, I can see Danny completed his services for today. I can also see the parts and material that were used and actually let me go up one step here.

--- *Assets* ---

DANIEL

1:01:37 Under this specific service is a piece of equipment that's tied to it. So here's that picture of that, of the capacity that replaced it's, automatically attached to that equipment? Not just as an attachment. So that way there's nothing further for the office to do... down below. You've got your time material.

--- *Tech time tracking* ---

DANIEL

1:01:57 We've got our clock events. How long it took me to get to the job? How long I was on site for?

LOUWS

1:02:03 Did you enter the labor in there or did that automatically figure it out from the clock in?

DANIEL

1:02:11 And clock out. So that was me if you remembered under line items, I went in and added my labor two hours?

LOUWS

1:02:18 Okay.

DANIEL

1:02:20 Yep. How do you guys track? Let me ask you that. What was, the purpose of that question? How do you guys, I guess track labor? Now? Do you use like clock events or guys putting in manually their time?

LOUWS

1:02:32 So we have something called a W PR?

DANIEL

1:02:35 Which is a work performed.

--- Paper process ---

LOUWS

1:02:36 Report basically, it's just, it's a sheet of paper this big with a bunch of check marks on it that, and then it has a time block in the bottom that the customer signs that. And the guy just takes a picture of it. And that provides the office with the, you know, we're billing with the amount of hours that we're on that work.

--- Tech time tracking ---

LOUWS

1:03:03 So, okay ServiceFusion does have the, it does have the capability of keeping track of hours and then an auto billing for that. But it's again, you very user input, or user driven where if the tech does not hit on site or, you know, start the job when he's on the site, then it doesn't track. And if he doesn't check out at the time he leaves, it automatically adds eight hours to that invoice. So we don't use that feature, yeah.

DANIEL

1:03:41 Yeah. So there's a couple of different ways to do that. You figure out, what works best for you guys can use clock events. But to your point that it's kind of… error user way to happen, right? If you forget the clock in, you're kinda screwed there guys are always putting in time material. So I just entered that in it's easy to be there. Again. We've got that also notified is that deficiency.

--- Deficiencies ---

DANIEL

1:04:04 So this deficiency, couple of things are going to happen here. One, it's gonna show up on the job page itself. Two, there's gonna be an e-mail alert. So cert service trade has notifications that you set up for individual users. So let's just say I'm responsible for Weber him onto academy as soon as that technician, save that deficiency. I got an e-mail alert. Now you can have it go to one person in your company or 50 people in your company. But I've already been alerted via e-mail that says, hey, we need to act on this right away. I'll show that to you further. But there's so many different ways to make sure that you're never missing out on the deficiency.

DANIEL

1:04:43 And then last but not least comments, right? Comments can be a couple of use for a couple of different things. One, you can have job notes here's. What I did today, but two, maybe there's like an actress entry code to get into a building or something specific for that site.

DANIEL

1:04:55 You can have comments with different levels of this visibility on it as well. But at the end of the day, you know, we've got all of our attachments. We see the before and after picture. We can see our time material. We're able to see the services, that were carried out in the pictures for that service.

DANIEL

1:05:13 And now, what happened is we're going to complete that job. So in service trade, we have different price books, right? Your customers, maybe you have different pricing structures with different markup rules. So service trade allows you to have multiple contract prices in service trade or in the platform. So that way you have specific market rules tailored to that customer.

DANIEL

1:05:37 And then here's, what we'll be looking at inside the platform right here's. Your, your kind of final invoice before we send that off to the customer, you can make any edits as needed. But at the end of the day, you'll see your costs and your total margins for this particular job.

DANIEL

1:05:53 Now, one of two things can happen here. We can say, great, we're going to go ahead and send this over to our invoice department and invoice how we've been doing it for forever or we can invoice through service trade. If that's the case, you'll be able to display your pricing.

DANIEL

1:06:07 So as you can see, how do I want to display my pricing? I'm just gonna do grand total only for today. And then maybe you have specific notes you want notes to carry over from a job, you can go ahead and add those there. And then we can send this invoice to the customer. Maybe it's gotta go to a couple of people. We'll go ahead and send that.

DANIEL

1:06:34 And so now you'll get an invoice in a few moments here, Sean, which I, you know, copy and paste some of your logo information to try to make it feel that, you know, this is what your customer would see if you guys are using service trade.

LOUWS

1:06:49 Okay.

LOUWS

1:07:08 Okay. Got it. Yeah.

DANIEL

1:07:13 And, and what you're seeing there is that's you know, a service link that gets attached to the, and let me just pull it up. So make sure that we're all on the same page. So if you're looking at the invoice... you'll be able to, whereas my invoice.

DANIEL

1:07:36 What let me ask you is what are your thoughts on the invoice as you looked at that itself?

LOUWS

1:07:41 It's definitely clean. Yeah, you know, looks good.

DANIEL

1:07:45 And did you open up the actual e-mail and hit view invoice detail?

LOUWS

1:07:52 Just did that? Now it's just looking at the body of the invoice. Okay. You got a pay now tab. I see that.

DANIEL

1:07:59 Yup. And so again, what you're looking at everything from the highlighted line up that's not configurable, that's how it's always gonna look coming from service, trade everything from that highlighted line down or sorry, I should say from the service completed down that's all you can customize out how you want, the pricing to display any terms of condition, that's always going to be your verbiage, and your layout. But what the customer can see is they click on service details. This is where they can see all that information around the appointment. And if you're looking at my screen as you can see you dictate what you want shared and not shared. So I had everything turned off the moment, but then I turned on the attachment.

--- Invoicing ---

DANIEL

1:08:40 So that way you can just see the pictures but they're not gonna see the audio file. If I have that turned off, right? They're only gonna see the attachment of the picture. And then the metric of, you know, why they should join, our force for PMS. So again, this would be completely customized, what you want your customer to see when they're reviewing an invoice, and then you have the final option to allow them to pay online whether it's ach, credit card, po, you guys set up the threshold of what their limitations are for using those different avenues for payment. But that was something that our customers requested us building the platform last year. And here it is.

--- Deficiencies ---

DANIEL

1:09:24 The last piece I want to cover here would just be the deficiency loop here. So again your office staff, I'm your salesman. I just got alerted that over at over him as an academy. We've got a rooftop that's down. So here's the report that I'm looking at location, the equipment.

--- Assets ---

DANIEL

1:09:41 I've got a brief synopsis of everything that's happened because at some point, you know, we may be here and this deficiency history is now nine articles long. Maybe this is the time that I recommend an entire unit replacement for my customer. So here's where you can easily track those, that equipment that you were mentioning earlier on our conversation and the attachments.

--- Quote templates ---

DANIEL

1:10:01 So here's the before and after, the pictures. And then here's an audio file on the repairs that need to get quoted out. And then right from service trade, we can generate a proposal. So in our platform, there's a lot of areas so you can templatize things to be able to go ahead and continue to use and just build upon those templates. So I've got a compressor replacement that I'm gonna add in… gonna have your verbiage, all the information around this. Maybe you just want to change this because whatever this custom requires a special amendment, right? So we can go ahead and put that in there. It will only change for this one article, not for the entire scope. And then the line items, right? So here are the typical line items. We quote out. We got a call around for a compressor that we don't keep in stock. So we can put one off in there as well. But the goal is to be consistent with your pricing as far as when you're quoting out, you know, here's all of the, you know, the standard template that we need to build off.

--- Pricing ---

DANIEL

1:11:08 But now I can change this because Danny said it was going to be four hours. He also needed a helper on here, right? Which is a line item. So we can get our helper pricing in. He said two. But we're just gonna quote for four just to be safe.

DANIEL

1:11:23 And this is for our hvac department. And so again, you can modify the different items that you need to build out this proposal. And then based on the contract that has specific mark up rules, you guys will get your pricing. So you can see what your margins are long before I get this sent over to the customer.

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

DANIEL

1:11:43 And just like in the invoice, how do you want to display pricing? Everybody's different, certain customers wanna see different input. So you'll have many options to leverage there. And then the last piece is just to get this over to Sean for approval. So I'm gonna send this his way if I need to send it to multiple people, I can do that. And then lastly, I don't need the audio file going over there, just the pictures. So I'm gonna send it over to Sean. And so now you'll get an e-mail a few minutes where you go ahead and open up that e-mail hit view and respond. And, and now this is the way that your customers would be able to interact with you guys through your quote through the ServiceTrade quote to be able to get those services approved, and turn into a job.

LOUWS

1:12:28 And then, so you just emailed that to me? Yes. Okay. So, yeah, the one big feature I'm looking for is for, to like click to approve. I think you guys had that.

DANIEL

1:12:45 Yup.

LOUWS

1:12:47 Yeah. Right on. All right, cool.

DANIEL

1:12:51 Yeah. So what you're looking at is, you know, that your company logo is always going to be in that top left hand corner. And then the action items are for your customer in the top right hand corner. So approval request changes. What you don't see is that big red button to halt that communication, right? So they can approve it. And by doing so, they hit approve, they enter in their information and they hit approve for a second time. That's a legally binding contract. If they request changes, maybe they want, you know, to come out in a couple of weeks or get a price reduction. Cool. The goal here is to keep up open line of communication with your customers and not let them reject it.

LOUWS

1:13:25 Okay. And there's no rejection button.

DANIEL

1:13:27 No, only for you all and the office, maybe the quote didn't go through. You guys can reject it so you can track it but the customer has no option to hit, reject... the last piece, right? We have a big CRM feature where, you know, you guys may want to get an alert.

--- *Quoting* ---

DANIEL

1:13:44 Maybe this customer is not the best at interacting. So as a sales manager, I just got an alert that Sean looked at the quote. I'm gonna call Sean right now and give him a few minutes on a call because I know he's looking at it. So you've got a full, you know, CRM functionality behind you to be able to see from the time your technician found the repair. Did your salesmen quote it out? Did the customer open it up? We track that, start to finish. Once that quote gets approved, you guys would get a notification that says Sean just approved the quote. And here's how easy it is to turn that into a job. I'm gonna approve it for you, Sean.

--- *Quote templates* ---

DANIEL

1:14:18 And I'm gonna go ahead and create a job that has all the detailed information from the time we captured that information up to the time the customer accepted that proposal. And now in service trade, you've just created a job with all the expectations, the services that are needed and the time and material that's forecasted.

--- *Quote templates ends* ---

DANIEL

1:14:40 And now I can go ahead and get this setup. We'll get Aaron and Danny out there... and we told them we get this done by the 20 second. So go ahead and schedule them out for the 20 second at eight a M. And it's we'll call it four hour long job, right? It's important because this will update the dispatch board. Now for Aaron and Danny, you'll see that Danny, and Aaron are blocked for the 20 second from eight to 12. But now you've just take in literally a deficiency and turn it into an actual job all within service trade without too many updates and double data entry points.

--- *Tech time tracking* ---

LOUWS

1:15:20 So with the hours that you've allocated to it, when that's generated into a serve work order, is that going to be displayed there to the technician to say this is a four hour repair?

DANIEL

1:15:36 If you want it to and that's all up to you, it's all on what you want to display that pricing. Would you want them to see that or no?

1:15:44 You know, got it. Yeah, it's like, you know, it's like a double edged sword kind of thing because, you know, a guy sees all four hours on there, you know, and he can get it done in two and he's gonna take four hours, you know? So.

DANIEL

1:16:00 Yeah. Now, that's service rate is, you know, in every user, you're gonna limit who has the capacity to have, you know, visuals and who can take certain action items and who can't so it's all permission based.

--- Tech time tracking ends ---

LOUWS

1:16:12 Okay. So, is there a, like a demo version that you have of this software? Like a demo log in just for like if I wanted to go in and just kinda click around and see, you know, features and, you know, how it works.

DANIEL

1:16:34 Yeah, to be transparent, there's no demo account per SE. Okay, we used to have them when I first started with service trade and they were not successful why that is because it's like buying a house with no furniture. There's no data in there. And most people don't have time to do that. So we actually took that away. It was the current for most people and it just caused more confusion with that being said. I know this is a critical component for you... if I feel that somebody's genuine in their evaluation and they're looking at service trade and this is something that they want to be able to accomplish. Typically, what I will do at some point during our evaluation is, I will set up a controlled environment where I'll give you a access to my account for maybe 48, 72 hours. But the contingency there is you have to be open to, let me say, great, Sean. What are you trying to achieve? I wanna just have a technician do a couple of jobs and invoice it from the office. Cool. Well, you dedicate 20 minutes to me to let you to show you guys how to properly and effectively do that. So that way you're not scrambling with maybe words or phrases that you're not used to, which I think would be the case.

--- Implementation and ongoing support ---

DANIEL

1:17:42 But anyways, that's all I would ask you guys, give me 20 minutes to set something up. I have a more controlled environment so that we're not going to haywire because the important part of onboarding is it's like a 10 to 12 week roll out where you get a project manager and you meet with that project manager once a week for about 30 minutes.

--- Implementation and ongoing support ends ---

DANIEL

1:18:00 And during that time, all of your data that you're sharing with our team is being input into your account. You're also going to get trained and certified on the

software, whether you're an admin or a field tech on how to properly use service trade. So there's a lot that goes into it to get people set up and successful before rolling out the other piece to that is if you guys are open to it, I'm more than happy to provide references for you guys of companies that are kind of, you know, fit your mold, have the same experience and let you guys speak on their trials and tribulations, right? The good, bad and ugly. I'm also okay with that. I feel like that's imperative, right?

LOUWS

1:18:41 So...

DANIEL

1:18:41 We've got options there. And if you're open to that, I'll certainly again, if it's a course of like we're ready to do this, I will dedicate that to you because again, I'm not just trying to give you a smoke and mirrors everything I'm doing is exactly how it works. There's no hidden buttons that a lot of software folks do that give us a bad name.

--- Assets ---

LOUWS

1:18:58 Sure. So when you're adding an asset, do you have the ability to scan, the text on the data tag or no?

DANIEL

1:19:08 Not inside the core app. No. Okay. What I come, you guys are doing that, there's an app called scan key. It's just a widget that you can put in your phone.

--- Assets ends ---

DANIEL

1:19:18 I use it and it's just a copy and paste. So that way you can go ahead and take a picture of that and do that as far as just cataloging that data that's on a road map. But that's nothing that will be in play in the next two, three months.

--- Purchase decision ---

LOUWS

1:19:32 Okay. Well, yeah, I feel like we've probably only touched the surface of what the software is capable of here. Yeah.

DANIEL

1:19:40 Yeah, absolutely. What are your thoughts so far?

LOUWS

1:19:45 It looks, it looks good, you know, but yeah, it's... yeah, a lot to cover and, you know, we only really talked about the software itself for maybe 30 30 to 40 minutes here. So.

DANIEL

1:20:04 When you said, you know, the sales cycles, you know, along with your customers, right? This isn't something I'm gonna try to sell you today. We've got a 96 percent retention rate. And so it's my job to ensure that this is a good fit as far as well as you. You gotta make sure this fits your company. So, you know, my ask is that if this is a good fit so far, I'd set up another meeting where maybe we can have some more folks on if you're open to that, and then we can create an agenda to go over, you know, a lot of the workflows that we haven't covered, like the asset management and tracking for all your customers, all the recurring services that you guys are offering, right?

--- ST app contracts and pricing ---

DANIEL

1:20:39 This is like our wheelhouse of making sure that you guys are doing well. And then at the end of the day... that you guys are profitable in your contracts with this, you know, with your customers. So that's another side that we do is the contract profit profitability on the equipment and agreements you have with these customers to make sure that, you know, next year we come time to renew, do we need to up our charges or we want to drop?

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

DANIEL

1:21:03 This is our bottom tee a 10 percent customer. We want to get rid of them. These people are a headache that's our goal with customers is just drop that 10 percent and add those higher volume customers in.

LOUWS

1:21:14 Okay. Yeah. So, I know we're out of time here, but perhaps, you know, we could... talk next time about just about how that maintenance feature works.

--- Tech time tracking ---

LOUWS

1:21:30 And, you know, a big question of mine would be, you know, can, does the software have the ability to track the allocated amount of hours versus the hours that are being spent? You know, to see, you know, where we are on, that maintenance margin, you know, because that's very slim versus service, right? Sure.

--- Tech time tracking ends ---

DANIEL

1:21:56 I mean, the reporting, is in depth as you want it to be. We've got, you know, we've got that availability for you for sure.

LOUWS

1:22:03 Okay. All right. Good. So, yeah, I, is Jason gonna reach back out to me to schedule a follow up where?

DANIEL

1:22:16 It'll be you and I from here on out as, you know, she's, my work horse out there just identifying good fitting customers. And again, I appreciate you setting up a call and she was excited to have this meeting. So from here on out, it'll be you and I meeting as far, as a follow up meeting. Do you have some availability that you're aware of now for next week or do you need to talk to some folks?

LOUWS

1:22:40 I would say that... I'm not actually, I'm not in my office actually.

LOUWS

1:22:52 Would have to just meet. I've got an office meeting on Monday. So let me just see how that goes and then what, you know, I have lined up for the week, but yeah, I would definitely like to see... the software further... you know.

--- Purchase decision ---

LOUWS

1:23:15 So at least, yeah, what you showed me so far, is got my... interest to see what other features it has. So.

DANIEL

1:23:26 Awesome. We appreciate that. Like I said, I was legitimately excited to meet with you. And after you discussed a lot of what we said in the early part of the conversation, it's in my mind, you know, home run everything and we haven't even touched a lot of those critical components.

--- Purchase decision ends ---

DANIEL

1:23:41 So I appreciate your time there. What I'll do is you've got a meeting Monday is, you know, if I call you Monday afternoon to try to figure out a time for that week? Is that, is that good with you?

LOUWS

1:23:50 Yeah, perfect.

DANIEL

1:23:52 That or?

LOUWS

1:23:54 E-mail, me emailing me is the best thing to do.

--- *Paper process* ---

LOUWS

1:23:58 My phone's continuously blowing up and I am the type of person that if I am on the phone with somebody, I don't hang up on them. I, you know, I finish the conversation. So... just, I would prefer if you just emailed me, you know, and then I'll respond, in a timely manner.

--- *Paper process ends* ---

DANIEL

1:24:19 Okay. Yeah. I will do that. I'm out of the office on the 20 second. But like I said, I'll follow up with you on the eighteenth and the goal of that call will just to, you know, maybe set up an agenda for, you know, having a more in depth evaluation for what we didn't cover today.

LOUWS

1:24:35 Okay. Yeah. Wednesdays and Thursdays are typically my more open days. So, so, yeah, that's I'll target for one of those days there. And yeah, I'm in kind of a waiting period on a job right now. So, but if that hits, I got to dedicate my time to that. So that's gonna take already, you know, just being as transparent as possible.

DANIEL

1:25:06 I appreciate it and I'm not going to be the guy I called you every 15 minutes to hound you. You know, it's my, one of my calendar doesn't allow for that, but too, it's just not my tactic, right? If there's value there, there's value there. If it's not, you know, if you've been transparent, just keep that up. I appreciate that. And I'll do the same.

--- *Purchase decision* ---

LOUWS

1:25:21 You...

DANIEL

1:25:22 Know what last thing for you is just like a roll out like this, you know, is this a big task for mechanical 24? I mean, you know, you mentioned looking at other components, but if you've found the right fit, you know, what is that? I guess hierarchy look like of making a decision?

LOUWS

1:25:38 I am the ultimate decision maker, but I need to convince my management team, you know, that this is the best route to go. Okay. So I guess.

DANIEL

1:25:54 One stroke in the check, right? So.

LOUWS

1:25:56 Yeah. So, right. If I, if I go ahead and just say this is what you're doing that's fine.

--- Purchase decision ends ---

LOUWS

1:26:02 But then, you know, I'm essentially taking ownership of it, right? But I empower my employees to take ownership of, you know, what they're doing and then the decisions they're making so that then they can, you know, succeed, right? Instead of saying, well, hey, you know what? I've got all these hurdles that you've created for me. So, you know, what? I'm gonna just throw it right back at, you know, so I try to prevent those types of things. You know, I've got, I'm you know, more about advancing our company and creating, and creating money making opportunities versus, you know, hurdles for my employees to jump over.

--- Purchase decision ---

LOUWS

1:26:46 So, yeah, so I guess just to give you an idea of how, you know, in order to get us on board would be, you know, to show me completely. So then I understand it completely to then show my team. If they are like, yes, this looks interesting, then we would meet with you to give them a demonstration, answer their questions, then it would come back to me to make a decision.

DANIEL

1:27:17 Okay, cool.

LOUWS

1:27:19 So a little bit long?

DANIEL

1:27:22 I like understanding of that. This is a big decision you make, and kind of a benefit for you guys is my outside sales rep. I think it's like an hour away from where you live. So, like if I wanna make this tangible and feel like the mobile app, cool. He's pretty close to you guys and just another resource. So.

--- Purchase decision ends ---

LOUWS

1:27:40 Yeah, that would be great. I would, yeah, having somebody come in would be huge. Yeah.

DANIEL

1:27:46 Yeah, Michael, he's a down to earth guy. He's grew up in the Chicago land area. Yeah, you would enjoy him. He's an awesome guy. But like I said, what I'll do is I'll follow up with you on Monday. Is there like afternoon? Is that the best you say?

LOUWS

1:28:01 Yeah, like I would say, Monday between, you know, two and three o'clock...

DANIEL

1:28:07 Okay, cool. I'll shoot you over an e-mail and then if we can shoot for Wednesday, that'll be great. If not, we'll figure out the time works best.

LOUWS

1:28:15 Sounds good.

DANIEL

1:28:16 Awesome. Great. Meeting you. And thanks again. I'm gonna let Chase know that, you know, we have a great call. So, thank you.

LOUWS

1:28:22 Yeah. Appreciate it. Have a great one bye.

The End