Followup ServiceTrade Demo with HVH Mechanical Partners llc

Maribeth Steffen with HVH Mechanical Partners
Recorded on 3/23/21 via Zoom, 1 hour 11 min.

Participants

SERVICETRADE

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Topics

Transcript

MIKE

0:00 Good afternoon.

MARIBETH

0:01 Hey, Mike. How are you?

MIKE

0:02 Good. How are you?

MARIBETH

0:03 I'm good. Let's see. Let me just get some of these windows close. Alright, cool. So the last time we left off, we had talked about how we talked about the customer portal, how your customers can request service. We kind of started the work order. From the technician point of view. We got through the quote process, talked about how easy it is to document that repair, turn it into a quote, notify the office, track those quotes in terms of whether it's approved, you know, request changes the status as a quote. You can drill down by customer and things like that. So my plan today was to maybe show you some alternative ways to schedule your work because obviously your customers and always going to be requesting that on the portal and then kind of finish out the technician workflow and talk a little bit more about the... the office capabilities. But I'll kind of open the floor to you first to... to see if you have any questions about what we talked about or if there's anything that's kind of really important to you that you need to see to.

MIKE

1:15 So probably the most important things I would like to see today is really the mobile side, the INS and outs of that and the ease and simplicity of it for, you know, typically the guys are going to be using out in the field if it's... if it's two and a quarter, you know, if it's too... too many walk-thrus or click throughs, are guys seem to lose interest pretty quick and that's where mistakes happen, right? So, yeah, I'm a lean six sigma guys. So, yeah, my idea is to remove human error. And the only way to really do that is to remove steps from the process. So for me, it's really looking at the function. Now they have the mobile app and what can do with that. And then we can kind of move into the progressive billing and preventive maintenance stuff... along with some of like I think you kinda really give me a good... good high level view our last meeting. So I would probably say more along the lines... how... how to avoid things falling through the cracks, right? With automated billing and invoicing and things of that nature. And then maybe touch on a little bit of inventory if that's something that you guys do because we are an HVH service company. We don't carry a lot of inventory, but we do from time to time, obviously, we have refrigerant on the

trucks for the guys. So we have some consumable as we have some tools, and we are in the process of building a new pipe fabrication shop as we speak. Hopefully it's up and running by the end of this year or early Q, one of 20 20 to where I would like to keep us all on the same system. It's not comparative that we do, but it'll be nice if we could wear, probably have some inventory that we might stocking carrier. And, but again, nothing to anything extreme. I'm not looking to be a warehouse or anything of that nature. It really be like some of those high volume things that are typically used from job to job so that I don't have to wait for it to come to me from a supply house. And then we just charge it out as applicable? So that's kind of where my head's at right now and again, if that part or something we really can't get into today or is that something that you really do that's fine. My biggest pieces just can the guy, is it easy for the guys to use in the field? And how can we make sure that we're not losing money on jobs or PM, just service agreements, but letting things slip through the cracks. So how is? The system making almost error proof and alerting us of potential issues moving forward.

MARIBETH

4:04 Okay. Now, let me ask you this in terms of the inventory piece... a lot of our customers, a lot of prospects I'm talking to, they are trying to reduce that, the inventory that they have on hand oftentimes because there isn't a good way to track that information. Inventory is a beast for sure. So if you're not looking to track what's in a warehouse, it sounds like the most important component to you is ensuring that all items are accounted for on the work order, or if you need certain items for a job, that you have a way to communicate that to the technician prior to them going out to perform that work to ensure that they have everything that they need before they're going out... is that... is that?

MIKE

4:57 Yes.

MARIBETH

4:58 Okay. Okay. Cool. So let's can you see my screen with hargrove elementary?

MIKE

5:04 Yes, ma'am. Okay.

MARIBETH

5:05 So what I'm gonna do is we're going to schedule a job and then I'll... I'll go out into the field and we can talk about the mobile app. But we talked about scheduling from like I said, the... the customer portal and there's a couple of different ways that you can schedule work inside of service trade from the office. The technician can also add a job from the field. If you give them that permission is a permission based setting. But on this location page, so remember the way that we structure our data is we have your company in this case, at Samson county schools. And then underneath that company umbrella, we have all of the locations are sites that you guys service to today. We're at hargrove elementary. And on the location page is going to be where you find all of the relevant information about that, say including me equipment. The services that you have now services are different from a job, the services, the commitment of work that you've made. So the customer that's not actually the work order itself, which is what we call a job inside of service trade, but you'll see you'll

also see all of your work orders, quotes, any repairs that were documented, any location documentation, and things like that. So you'll see all of essentially the history and any upcoming work that you have for this location.

MARIBETH

6:17 So you can see that we have a service to in March. We don't have any active jobs for it. So I wanted to talk to you... you said the preventative maintenance services. So what... what are you guys doing to track when your customers are due for their PM right now?

MIKE

6:33 So it's great question. By the way right now it's set up in the system. Once we have the, I guess the first go live date is when we're visiting. If it's a quarterly, if it's a semi annual, it's an annual inspection. We all kind of future set it up from there, but it is manual. So once that first start date is, we can go ahead and we can enter information we need in there. We typically auto renew unless somebody tells us differently. So the system should, and I'll be quite honest. I haven't had time to test it because I haven't been with the company that long to see if it auto generates or do we have to keep doing it the I can tell you right now when I was talking to obviously their work around was to put it in there for 10 years, right? So you put it in for a cycle of 10 years and if you need to cancel it, you cancel at any time. So there's... there's really no automation to that. And then the other thing that seems to get a little convoluted is we have a couple of ways that this works on the service side. So you have, maybe we are only doing quarterly inspections but they want to be build out monthly, right? So you really have no cost on some months if that were because we didn't visit it, but we're billing them on a monthly basis. So I'm trying to figure out how you would do that and your system, right? Because you're... you're you have a set amount to say it's 10,000 dollars or less, just make round numbers, right? So say it's 12,000 dollars, right? For the year. They want you to Bill you, they want you to Bill them quarterly. I know they want you to Bill monthly, but you're only going quarterly red. So you're going to go ahead and you're gonna Bill 1,000 dollars a month, but you're going to have no cost really on that invoice. So it's looking like you're... you're a rock star, right? Until you quarter for when you might have some costs and has to be applied to. And then really, you don't know if you're making money until probably the, you know, the six months into the contract where you have a couple pieces of data to actually place labor material to. And at that point, you've already build six months, right? So, so it's understanding, where are we? What can we have a really hard time of getting the set up properly and billing it properly. But be, how do we know for winning or losing on these agreements, because if we're only billing when we arrive. So for say, we're doing it quarterly and we're only doing quarterly inspection. I think it's less of an issue because we'll have costs, right? But for billing monthly, but arriving, you know, semi annually or quarterly, it just throws the numbers off. It looks very skew. And then we don't and then we really don't have a good way of assigning technicians for future inspection. It's so there's no way that right now that dispatch without going into a separate system, I'm looking at the current agreements when these are do are expiring or when they're do to... to get somebody on site, we don't really have a good way of doing it. So it'll be nice if that was automated for us to tell us when and what services needs to be divided, when they need to, provided, when they need to be updated, if something's about to expire, do we need to redo it? You know, things of that nature.

9:53 Okay. Okay. Gotcha. Yeah, I mean certainly there's a lot of moving pieces when it comes to... to preventative maintenance and ensuring that you guys are delivering on that agreement. So what we do inside of service trade is you can see this service, I've actually use that template. So just like with quote templates, we have service template. So for those quarterly preventative maintenance or monthly or annual, and it's the exact same scope of work, you can get templates inside of service trade. And just like on the quotes, you can type items to those templates. So these are the items that are generally used for a quarterly H fac, preventative maintenance service. And then when it comes to the scheduling window, generally speaking, most people are just saying, okay, we gotta get this PM schedule sometime in the month of March or if you need to do this on a single day or a certain timeframe like the second week of the month, you can create your... your scheduling window. So to speak. So for this service, we do have it anytime in the month of March. It happens every three months, meaning it's a quarterly service. If it's semi annual, we want this to repeat every six. And if it's annual oops, if it's annual, then we can put this in for the year.

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MARIBETH

11:08 So once your services are setup, which by the way, if you guys have a spreadsheet of this or can compile a spreadsheet of this before implementing with service trade, this is part of your onboarding process and it's included in the setup cost. So we can get all of your existing kind of agreements and commitment of work set up prior to you guys going. But any additional commitment, you guys can obviously set up yourself. So once we have kind of the service setup and looking the way that we want to, there's multiple ways to actually schedule this work. We can add a job right on the location page or probably the best way for making sure that you guys are being proactive with those preventative maintenance services is what we call a service opportunities report. So you can... you can pull a report for everything that's do, let's say this month. And this is all of the services. This is not work orders that have been created. This is where you actually create the jobs or the work orders. So I can see that this hargrove elementary school is down here. One thing I meant to point out is I also have a preferred technician assigned to this service. So you can do this on a service level, or you can do this on a... on a work order level. So if you want marry that to go out to hargrove. Elementary for every single quarterly service. Then you just want to assign them as... as the technician. So you do have the ability to do that. And then I can create all my work orders here. So I can schedule all of my work quarters and bulk create them if I want to or I can just schedule the single one for hargrove elementary. I can see down here. This is a preventative maintenance. So I'll go ahead and indicate that any scheduling notice that we may need to add, maybe... send Charlene because he...

MIKE

13:08 Time.

MARIBETH

13:09 Or whatever you need to indicate as the scheduling. Now. So then once we have all of our kinds of data in here and you can see, you can assign a salesperson to this job if you need to. We have this as a default office. So we have the ability to kind of segment your work either on a logistical way or if you do have different physical

offices, maybe not now, but in the future, we can kind of accommodate that as well. Okay. So what I'll do is I'm gonna go ahead and create this work order. So we've created the job and a couple of things are gonna happen. We'll see that's of course, on the location page, this is going to be let's see this is going to an unscheduled work quarter right here. For what you can do is we have both of map based, hello. So for being proactive and kind of scheduling your work in the future, that's probably a good way to set up your work orders. You can filter by a specific office, a date range. Keep in mind. This is that long list of service lines that we have in our demo account. It's only gonna show what you guys have. So H, back plumbing the pipe fitting division. If that's things that you want to track. So you can segment your work by... by kind, have like division essentially. And then we can schedule the work by the job type. Also on... on that base scheduler, you have the ability when you're setting up these services to put in... put in an estimated price. So if you wanna knock out your most valuable work at the beginning of the month and expedite cash flow into your business, then you have the ability to kind of filter out that way.

MIKE

14:51 So you can category. So you can like categorize it or prioritize it, I guess.

MARIBETH

14:59 Yep. That's exactly right. Yep. So if you want to let's see, so on this service, let's see if we have an estimated price in here, we do 500 dollars. So you can take that estimated price and I'm just kinda of pull this. Yeah, if you want to knock out everything, you know, that's greater than 1,500 dollars first, then you have the ability to do that as long as you're kind of tracking that estimated price because that's what it's gonna pull off of. So once we filter this work out, what's going to happen is, let me back out of here a little bit, alright, Sam, same county, probably this one. Yeah. Okay. So we can visualize all of our jobs on a map so that you can reduce windshield time and kinda schedule your technicians to a specific area that's what makes sense for your business. So, because I'm the preferred technician, I'm already assigned to this work order. And what I can do from here is I can just drag and drop this onto the calendar. If I want to do that. I can also access the work quarter directly from the map, the scheduler. It's just gonna take me to the job and I can schedule the appointment that way or I can just add an appointment right here. So I'll just say we want to get out there today and let me get out here at noon. We have an estimated time of about two hours. And then once I save this back since this is a change that's happening the same day, I'm going to get an vacation as a technician that hey, your appointment list has updated. And then additionally, I'm going to see it on my appointment list for the, let me get my tablet up over here. I'm gonna see it on the appointment. Last. If I filter by today, refresh this page, let me make this a little bit bigger. And then I'm gonna see just like I did in the office, I'm gonna see, okay, this... this hargrove elementary, I'm going to see the services, the quarterly preventative maintenance service. And this is gonna kinda give me as a technician, all of the information that I need. So before we go into the mobile app, what questions you have about the scheduling, that kind of scheduling process?

MIKE

17:22 No, I do. I actually like that. So I have no qualms with it right now.

MARIBETH

17:26 Alright, perfect.

MIKE

17:27 And you said... the... the... the... the way you're measuring it is, it's... it's in the app on the phone, correct? You don't have to put anything in a... in a vehicle.

MIKE

17:42 So you're you click, so you, and then at this bedside, like you have a map, right? To see where people are. How are you?

MARIBETH

17:49 Yeah. No, that's exactly right. So this is your customer location, not where your technician. So we don't... we don't track the track is... is going down the road. So, but what it does allow is it lays out all of your customer location, so that you can kind of schedule your technicians to a specific area. So we don't create the routes, but we kinda give you the information that you need to maybe optimize your technicians, time out in the field.

MIKE

18:15 When you, when you assigned. So when dispatch assigns a guy, say I'm assigning a guy for next week or tomorrow, right? When I assign that person to it, is it gonna pop up on their phone or alert them? Hey, you've been assigned XYZ. And basically if they clicked it open, they could utilize, I mean, they have obviously, we have all the customer's information, but if they click them address, it would basically give them a Google maps that take them to the location, correct?

MARIBETH

18:45 Yeah, but they can click this directions and it's about what's going on. Yes. And that's gonna pull up Google maps. Now, the... the... the one piece of clarification I would offer is if you're making a change the same day, I believe the actual role is within eight hours. But if you're making a change the same day, yes, your technician is getting a notification. But if you're planning out for next week and you're laying it all out on the dispatch board or on the map piece scheduler and you're making changes and no, your technician isn't gonna get a bunch of notifications about that. So as you guys are, the further you get out, you know, pass that eight hours, they won't get a notification. However I can see what's upcoming. So I have this on my tablet filtered for today, but I can see all the appointments that are assigned to me as well. So I would be able to see if release that appointment. You have the ability to... to not released appointments as well. So you can see it in the office, but your technician might not see it. So, but if you're releasing them and then they'll be able to see what your scheduling for next week, they just won't get notifications for any changes that are made unless that same day. Okay? Alright. So we talked a little bit about the different clock events. So they can clock in for job type. If they're going by vendor or the warehouse, they can notify the customer of hey here's my estimated arrival time, they can clock in on site. This is all gonna kinda fall onto the work quarter inside the office so that you guys can clearly see how long it took the technician to get there as well as how long they're spending on site.

MIKE

20:24 What?

MARIBETH

20:24 If they're...

MIKE

20:25 Not clocking in, what if... what if now for our guys? And I don't know what it's like with other people, but at least I know for our guys, they are terrible that clocking in and clocking out stuff, right? So do you have the ability to go backwards? And what I mean by that is like say I got a guy who's worked at two or three different jobs today, just hasn't had time o'clock, is piece in there. But he, at night that's when he typically goes back to put it in his hours, do we have the ability to go backwards?

MARIBETH

20:58 The technician can't and that's kind of on purpose so that they're not manipulating their clock events? Do you can do that from the office and you can make any adjustments that you need to from the office. But they don't have the ability to make any adjustment on the mobile side. The other thing I would say is, and we'll talk about like preventative maintenance checklist or any paperwork you have outside of the work order. They have to be talked in... in order to access that... that paperwork. So I understand... this is not a challenge that's unique to... imagination technicians just generally aren't good at the administrative staff, but it would be something that we would probably want to focus on in the training as well as in like the testing period. So I think it's maybe just a matter of kind of conditioning the technicians. But at the very least if they get to the paperwork part, they're gonna have, they're gonna realize that they're not pop in and are going to have to do that. Okay. Alright. So, so we're collecting on site and the technician is gonna see the same information that you guys see in the office. The scope of work. It's a quarterly preventative maintenance service. Any comments that you guys want to share? You know, what... let's say... let's say I wanted to maybe from the office include, hey, access gate code one two three four, or check in at the front office. We can make this a technician know, only viewable to people in your company, not necessarily your customer. And then once they go back and I refresh this, we're gonna see that comment here. Access gate code one two three four. So, and the technician can share information back to the office this way or the customer as well. So we talked about the... the deficiency or the repair process. Do you want to go through that... that process again? We may not necessarily need to do the quote, but to you, since the mobile application is important, okay. So this is going to be the first shot of work history that your technician is gonna see. So we can see all the repairs that were previously documented here. So if I need to add another one, I can say, hey, we have a broken compressor, they can talk to text here as well if that's easier for them. But they don't have to be super descriptive because they can add all kinds of attachments. So I'll take a photo. I can add a video demo. I can record an audio memo if this compressors making a weird or I can just say, hey, Mike, this is Mary Beth. I'm not hargrove elementary. I found a broken compressor, this is what I think is wrong. Here's. How long the repair might take this. These are the parts I suspect I might need. So they can kind of communicate to you guys that way as well. So here, gonna your technician is gonna see three different levels of severity in terms of this type of repair. So they can market as deficient and operable or suggested. So we'll just market as an operable this time around. And then here's the list of the assets of the equipment that you guys are surfacing. So we want to ensure that you can tide this to the correct piece of equipment, so that all of that Rich work history falls at that asset level, not just at the location level, the building is going to be a default asset and all of your locations, but we'll go ahead and tied it to that rooftop be. And

then here's that list of service lines again. So we'll try that to the H fac in the event this is something small, this is like a thermostat replacement filter change, something minor belt change, they can market as fixed and go on about their way or if they market is new, that's when the office is gonna get a notification that says, hey, something is going wrong. We have a new deficiency that we need to take action on. So the technician can go ahead and save that back. We have it'll take a minute for those... photos to upload, but we've documented repair opportunity so that you guys can capitalize on all that pull through revenue. And then we also have the ability on the mobile application to add any job items. So I mentioned we have the templates that's how these items are already on this work order because we tied those items to the service template. But I can certainly what we'll do is we'll take your standard items list and we will upload that into service trade. So we don't provide any. You're going to give that to us as part of your implementation. So we can say, okay, I'm gonna add a widget here. Now, you can see we're already tracking a standard cost for this of 12 dollars. So this would be your standard cost for whatever items that you guys provide to us. I can source this information, our source this part rather to a specific technicians. So if you wanna see what your technicians are consuming, if you wanna tied to a purchase order, if you wanna tied it to a warehouse or a truck, or if you want to get your preferred vendors inside of service stream, we can say, okay, I pick this up at abc part... and I can indicate a purchase order number. I think you said, how are you guys generating fields right now?

MIKE

27:02 Two ways. One, they do it in the field for themselves throughout a supply house, moving from a number, just a service call, or they can call into your office and do so.

MARIBETH

27:11 Okay. So... we... we... we do have an inventory management component and, but I kind of want to show you how it's gonna happen and service trade first before we talk about the add-on product especially since you're not kind of looking for warehouse tracking and things like that and service trade. What we do is we track your consumption of all of your goods. So you can keep the po process the same. They can generate their own po number and indicate that they can call the office and get that from the office. We can track whatever po you guys are... are associating with this item or... or... or work quarter. And then you also have the ability to track the status. So if he's just pulling it off the track, then, you know, no big deal. But if he's getting another vendor and they don't have it in stock, he can say, okay, hey, I've ordered this but I can't complete this work without that happening or a lot of our customers want all of that ordering control to remain in the office. So your technician can indicate to the office that something needs to be ordered or we can just indicate, hey, look they had it. I picked it up. I spent 12 dollars. I can also make the adjustment if maybe there was 15 this time. So it was a little more than your standard cost. I can make that adjustment as a technician. I can indicate the... the... the delivery date or the used on date. And then I can save this back. So all this information is gonna fall under the item. And you'll see that on the work quarter back in the office as well. So what... what questions about that process or concerns about that process?

MIKE

28:55 No concern. Chip.

MARIBETH

28:56 Alright, cool. They also have the ability if for instance, they do some type of changes out or it's a newer customer. And your salespeople don't go out and get the equipment information. Your technician can add or update existing assets that are at that location. So they can input what type of system the make model serial number, they can edit this information. So, in fact, we're not really tracking much on the specific unit. So if I'm here, I'm I've got a serial number. I can indicate that if there's a barcode number that I want, oops, if there's a barcode number I wanna put in... I can indicates... whether that's the one I wanted to look, this is a package unit. So I can kinda update this if we them get all the information the first time around or I can add a new system. So we track for each back payments. It's pretty extensive in terms of the information that you guys have the ability to track. If they do... do a change out, then what will happen is they can make this piece of equipment and active. We will never delete that because there's work history associated with it that at some point you might need in the future for whatever reason. So you can make it inactive, your dispatcher won't be able to schedule work on that equipment. Your technician won't see it in the field moving forward. But if the customer calls in for any reason from the office, can you, you'll be able to see any inactive work at the location site?

MIKE

30:37 We'd be alerted or how's that work? We'll just see on a dashboard.

MARIBETH

30:42 Will you be alerted if something's made inactive?

MIKE

30:45 Yes.

MARIBETH

30:49 I don't think so. Not natively and service trade. So when it comes to like alerts and things like that, what some of our customers have done is since we're like an open system, we have open API we can connect to and have modern system, a lot of our customers will create like a zap your integration. I don't know. Are you familiar with slack? The it guys use slack internally or any kind of messaging system?

MIKE

31:16 We do not.

MARIBETH

31:18 Okay. So we use slack internally. It's just like I am chat system and a lot of our customers use it as well. So you can kind of build like a zap your integration with either slack. You might wanna send an email to someone internally that's probably available and you can create specific triggers. So if this, then this, so you might have the ability to create if a technician make something inactive, trigger an email or a slack message to Mike and at the office. But natively, there's no alert system however you can kind of see the history who made it inactive and you have like a digital trail of that information if something does happen.

MIKE

32:09 Understood.

MARIBETH

32:10 Okay. All right. So... so we've talked about documenting repairs. We've talked about the job items, asset information, how they can access the directions. So let's talk about, I'm sure you guys have like PM checklist and paperwork and things like that, right? Passing sheets?

MIKE

32:34 Yes, we have, so I have you on mute because my kids running around background. Yes. So... we... we don't have per SE, anything in place, but I know some customers have certain protocol that guys just know when they show up. This is kind of what we have to do. So it would be nice if we were able to set up a hey, you know, make sure your shoes or clean or yeah booties, any boots or mobile allow like certain checklist that we could, maybe can you customize it for customers? Or is it like, hey, this is kind have everybody to do?

MARIBETH

33:06 Nope, you can. So what I'm gonna do is I'm gonna hit this view more details button. So this is one single application on your technicians device. It just has two different views. Now, a lot of this is repetitive. But what you are going to have the ability to do is we'll take whatever checklist, whatever paperwork that you guys are currently using or wants to use in the future. And we can create smart rules so that the proper paperwork populates for either that customer, the location. So if you have Sam, think county paperwork, then every low, every job that you do first Hampton county, we can ensure that that's the paperwork that populates if you have Samson county paperwork, but it's specific to each location. So hargrove elementary, we can make sure that populates or if you have specific paperwork for the type of service. So quarterly PM is probably different than a monthly, an annual or semi annual. So when we set up your account, we can create these smart rules. So I'm just gonna hit this actions button up top, download blank paperwork. Now, this gives me several options because I'm in a demo account, but we would ensure that the proper form populates at this point for the technician. So they don't need to kind of distinguish between all five forms. And then what will happen is once they go to generate this paperwork, we can also pull data that you're storing inside of service trade so that it pre populates on the form that the technician is completing. So you can see here's our asset information. So if you have a corresponding field on your form for the app, make model, serial number, things like that. Then we can input that your information, customer information, job number, the technician name. And then what your tech needs to do is they'll open this up. This is where they need to be clock into the job. So they'll open this up into Adobe. This is probably the piece that has the most kind of... of clicks. I think you're trying to eliminate that quick process shoot. Okay? I thought that I had Adobe on here. Let's see if not no problem. I can do this a different way. Okay. So what they'll do is they can edit this information and they would go through the checklist once they've completed it and Adobe. And then what it'll do is say add to service trade. And then once I click this add to service trade, it's gonna say, hey, this is the job that you're clocked into. Just want to verify that we've got this. All right. If they've completed it, it's going. To give them an indication you're not clocked into this work order. So they'll have to go that clock in and then attach the paperwork. And then once I upload this to the service trade job, we're gonna see this in a couple of places. We're gonna see it as attachment and paperwork. So it'll take about a minute to come through. And then we'll also see it

back in the office as an attachment as well. So we'll give that a minute to come through. And while that's happening over on this view as well is going to be where your technician can access all of the work history. So on the mobile app, they can see on the previous view, they can see all of the repair history. They can go into each individual asset and see all the jobs associated, an asset level. But from the location, they're gonna wanna see, they're gonna want to view everything here. So it'll have all of the work history associated with this location, all of the deficiency. And then this is location attachments. So you can have job attachments, location attachments, or asset attachments. So I'm on your assets, you might want to have... have some type of manual under location, he might want to attach some type of blueprint and your work order, you might want to. I don't know attach. I don't know maybe a picture of some sort.

MIKE

37:25 How are those? So, but that's based off, I guess pictures and information that we have answered and... and our database or how does that work? I guess because you're showing verify. So I'm... I'm assuming these are pictures and stuff that we've identified that are now in the system? Yep. Okay.

MARIBETH

37:44 Yep. This is history that we've already built in the system for this location that's exactly right? And I can add a photo he...

MIKE

37:54 As...

MARIBETH

37:54 The location photos. So if I want to take a picture of the front entrance to the building, your technician is gonna see that... task meant moving forward. So yes, a lot of this is history that you're building as you're kind of continuing to use the service trade platform. But you can also as high attachments, you know, to get your technicians started. So we don't import any work history that you have, but you might want to include maybe the last, a picture of the last work order from your existing processes. So you can put that on as a location or job attachment. So your technician has maybe something to go off of in terms of who was out there last time? What happened? Who did you talk to and things like that?

MARIBETH

38:46 Okay. Makes sense. All right. So your technicians also going to see the job items here so they can make any adjustments and add things here. There's the asset information. The deficiency, a lot of this stuff is repetitive. And the main reason for that is because over the last year or two we've taken a lot of the information that you see on this view and used it and put it in the mobile application. Like this is what we consider the mobile app. This is like a tool on your technicians tool belt. This is more like a clipboard replacement for your technician, but we're continuing to... to move this information to the other view because this has total offline capability. So your tech doesn't need to be connected to the internet in order to perform any of this functionality. As soon as they get connected to the internet, all of this is going to automatically update. They don't need to do any type of manual push it's just as soon as they have wife, I connection, everything will update for the office as well. And you

can see that we have that attachment and paperwork... starting to... starting to work. So the other thing I would show you on the mobile application is if you have a customer on say, I mean is it generally the practice that you're looking to get like a customer signature before they leave or do you have any kind of protocol when it comes to that?

MIKE

40:15 It's recommended, but it's not always feasible. Just a long time. Sometimes a property managers is not there on where they're or typically where they're really late at night because something broke. So there's nobody around, but we try to get a signature when we can, yes.

MARIBETH

40:30 Okay. We call it a work acknowledgement and service shame. So I'll drop a copy of this to you before your technician turns their device around to the customer. They have the ability to kind of decide what the customer's going to see. So in our account, we default to showing the items you don't need to do that. They're gonna see that on the invoice, they'll have an opportunity to do that. So if you want to default this to off, you, can you don't have any instances of your technicians invoicing in the field? Do you?

MIKE

41:04 No, never.

MARIBETH

41:05 Okay. So they won't even see this. So because I have like all of the permissions, it's a permission based setting. They won't even see that option to generate in the field here's, the... the efficiency information. I can add a comment here if I want to. And then what I'll do is just review this with the customer and say, hey, Mike, I'm... I'm out here with HVH. And while I was out here, I performance or quarterly PM service. I found a problem with the compressor. Don't worry here's. The information should be getting a quote down here. This is your disclaimers and warranties to whatever you currently pass along to your customer, will configure that at for your account.

MIKE

41:47 And then...

MARIBETH

41:48 Your customer can just check that box. They'll confirm and sign a copy of this will go into your customers inbox. And then you also have the ability to send this to someone else in the organization if they need to be notified of that as well. So before clock out of the job, what... what additional questions do you have about the mobile application? Is this kind of like meet your needs in terms of ease of use and functionality? And what are you?

MIKE

42:19 My thoughts. So, I mean, you have a lot of great things. I think the... the hard obstacle I have right now is the whole timing time clock situation like I understand that, say a training piece, you know, but it's... it's something that we have the ability to do. Now, what I'm trying not to do is obviously I want everything to be upgraded, right? So there's a 1,000,000 in one great features that you have compared to what we have now. But what I don't want to do is take away the easy stuff that we're already doing, right? So we're saying, hey, I'm this crappy system that we're paying 150 dollars a month for you're able to do this, but on your system, you can't right? So I'm just trying to figure out my I'm trying to wrap my head around that because I know that that's problematic for us right now. I'm not saying it's possible. I'm not saying it's an impossible apps, go get around. I do... I do agree with you. It's a training issue for sure. But I know if... if you're... if you're wanting me to be brutally honest with you right now, I think that's... that's one of the hard things that have is saying, hey, this has great features. But these guys have to clock in and they can't go backwards. And then if they need to go backwards now, we're relying on your office staff to fix that form which now just adds more people and more steps to the process. So again, not a deal breaker, just an obstacle that I'm thinking about in my head right now.

MARIBETH

43:50 Do you think that maybe... it sounds like it's a pretty common occurrence.

MIKE

43:59 Yes, because these guys, I mean if you think about these guys might be on for jobs in a day and to sit down and go over time and put all the stuff that they already got, you know, when they're on a call, they're already getting a call from dispatcher. When you're done with this, you gotta go here. And then when you're done here, you gotta go there. So there's no, they're going from one job to the next. And really if there's they have no downtime in between to be able to make those changes and make, they typically will do their notes. They'll do their things later that day when they have time whether they schedule an hour for themselves or the end of the day. And then sometimes it could... it could be next morning where they get the time to actually go through their notes and get everything inputted into the system, where they actually have time to do so. Because a lot of times they're jump into three, four jobs in a day and they're already given calls for their next call while they're on a call, right? So just it makes that part difficult... to have to be to have to clock in and clock out. And then on top of that, if you're not clicked in, you know, having access to certain templates, you know, if you're doing inspections are taken, logs of chillers, and things of that nature. It's just like again, it's... it's... it's not impossible. It's just a roadblock that I see right now.

MARIBETH

45:23 Yeah. I just, I wonder... if... if it is more prevalent because like at this point, that is their process. You know what I mean? So like at this point, they know that they can adjust their clock in and they know that they can input all of that information later. And no question. I mean, of course, you guys have reactive work and technicians are called and, you know, they're pulled in multiple directions. But what we wanna try to accomplish is and I understand everyone's business is different but we don't want them putting in their notes. The next day. He's looked at them to put in there. No, well, everything is fresh and they're actually on site and they have the ability to take the pictures and the audio and the video memos and things like that. Is generally speaking that's a much easier way to communicate information not just to the office

but it's an easier way for your customer to understand what's going on with their system because they could put all the notes that they want. They're never going to crawl up on the rooftop and see what's happening with their unit. And generally speaking, they don't have a good understanding of what you guys do. So taking the pictures and things like that is a really easy way for not only them to document what's going on but for you to kind of inform your customer of what's happening to now. With all that being said... if they, you're right? The office is gonna have the burden of adjusting all of those clock events. Are you using the clock events to calculate to help with payroll? Or are you only using the clock events to kind of track how long it's taking for, you know, a job to be done?

MIKE

47:13 Both.

MARIBETH

47:14 Okay.

MIKE

47:15 That's originally where they're at. And then... and then we're also seeing we're using that information to... sync and post with adp pay?

MARIBETH

47:25 Okay. So, yeah, I understand. It... it does sound like a bit of an obstacle. I can... I can be pretty confident in saying that. I mean, generally speaking, I like to kind of let people know, hey, look, this is what's on the road map. This is what's the calm. We can't do it now, but in the future, this is kind of the plan. I don't ever see the ability for technicians to him and talk about to happen because we have way more customers who want to prevent that then who want to enable that. So I just want to set the expectation that we don't have it now and we probably won't have it in the future. So since this is an art school of yours, it's... it's likely going to be there for the time being at least. So however, if your technician is clocking in and I can out, they don't have the time to put the notes in. What they can do is when it, when they do clock out of the job, if they have an input, everything that they wanted to, at this point, they have the ability to complete the service and complete the appointment. They can leave this on their tablet. If there's additional information they're trying to add. If they haven't gotten the notes and... and things like that, so they can access it again. But if they're totally done with the jobs and they would just mark that services complete and they would go ahead and say, yes, I'm done with this, is it, if they need access to it again, they'll just leave it open and say, no, I'm not done with this visit and then they can go in and update whatever they need to. And then... and then once they're done, they can complete it and send it to the office. Okay? So before I actually clock out, any other questions about the tech view?

MIKE

49:18 No, not at the moment.

MARIBETH

49:20 Okay. Alright. So we're done with that. I don't have any more appointments for today. And then what's going to happen back in the office is we can see that this services completed. The technician does not have the ability to complete the job or the work quarter, that control remains in the office. So the service and the appointment are complete from the office standpoint. I can review what's going on. I'm just going to refresh this. I probably don't need to, but I'm going to anyways just in case. So I can see, okay here's that widget that I added out in the field, the purchase order number here's. The clock events. I was only clocked in for a couple of six seconds in route Smith 29 minutes total here's. That flag because we do take a GPS snapshot when the technician performs clock events. So I'm not in Samson counting at hargrove elementary and on about 60 Miles from there. And you guys are gonna see this from an office standpoint to ensure that your technicians are actually clocking in where they're supposed to be. Not that you need that with your guys. I'm sure that there perfect. And you don't need to have that oversight. But in the event that you do, you can.

MIKE

50:37 Generous... I mean the truth.

MARIBETH

50:43 Like I said, most of the most of the obstacles or challenges that you have are not unique to your business. I've just heard many... many times from other people. So I've got... the... the deficiency that we've documented or the repair that we've documented. I have the work order documentation. So here is that work acknowledgements right away? That paperwork? I guess it's just taken another minute to come over... see if that, no, I guess it's still working, but the... the PDF syllable paperwork would be here as well. And then once all of this looks good and we've accounted for all of our parts, you can see we've got some refrigerant on here air filter that all looks good.

--- Pricing ---

MARIBETH

51:38 I can complete this job... and then I can create an invoice. So, you said that some quarterly customers are paying quarterly, some quarterly customers are paying monthly. It just kinda depends on what you negotiate with them.

MIKE

51:55 Yes, correct. And I know it sounds kind of weird but, you know, some of these people, their budgets kinda hit off... off typical calendar year. They're fiscal is different and they'd rather me see that money come out then be build on a quarterly basis.

MARIBETH

52:12 Yeah, yes. So what I would do is in the event that it's just a quarterly for quarterly, let's go ahead and create this. I'll create the invoice and kinda show you what that looks like. We have our gross margin here's. Our amount just like on the quote that you guys send, where you guys are going to have a good understanding of what you're making on the job before you ever invoice the customer. So you can

make any adjustments that you need to... to send the invoice. We call this an invoice link. So I'll drop a copy of this in your inbox to just so you can see it, but I'll pull up on my screen and your customer is gonna get a copy of this in their inbox, you have the ability to... to accept payment online. So you can set up a merchant account and your customer can pay either with a credit card or an AC H payment. But before they pay, they have the ability to access what we call is the services link. So this is gonna, this is like the post work summary essentially that you're sending along with the invoice. We've got the services, the files and paperwork, the deficiency record, any comments that you want to share with the customer. So they have a really clear understanding of what they're paying for and it's not just a description line items. You can include all of that Rich information and tell the story of the service that you guys provide. And then your customer can right now, we only have the ability they can only pay full amount. So like your customers, if you're you know, if you've sent this as a quarterly, they can pay for a month. We want to do that in a different way. So it would only be able to pay the 1,110 and indicate how they want to pay. And then once that's recorded, that payment is reported, you're gonna see that right here. And you can also take a payment over the phone and report that from the office as well from the portal. They'll also be able to access all of their invoices along with their work history, any quotes and things like that. So from the customer portal, they can also see that information. Now, let's oops, let's talk about... if you have... a monthly payment, so you can... let's see, let's... let's do the best with your first of all, you're not the only company his doing this. I'm just trying to determine because we certainly want to be able to track your costs associated with what you guys are consuming and what you're spending on the job so that you can see over the life span of the contract... you can create an invoice that is separate from the work quarter. And I think that... that might be the better option to do it. So, actually let's go to this location. What you might wanna do is.

MARIBETH

55:27 I'm... sorry, I'm just trying to... trying to figure this out in my head. We have the option of recurring invoices. I'm trying to figure out what the best way to do this is, we have the option of recurring invoices, it's on our end or?

MIKE

55:42 Yeah, it wasn't easy.

MARIBETH

55:45 Have our, we have our enterprise level, which is our top tier, which is not what I kinda price. Do you have you guys out? I pushed you out. I think it was on our mid tier level, but you can set up a recurring invoice for the customer. So that every month an invoice goes out for the amount that you need, that is independent from the work order itself. What you also have the ability to do is you can create an invoice and you can...

MARIBETH

56:29 Let's see you can create an invoice... here's. What I would do, I would create an invoice for the quarterly PM service, because what that's gonna do is that's going to give you the cost that you guys are, what... what you guys are consuming, what your cost is, and then maybe like zero out the, no, this is the... the cost and then maybe zero out.

MARIBETH

57:02 Zero out the price. So this is the price to the customer. Okay? So.

MARIBETH

57:15 Alright. Alright... alright. So this is everything that you've consumed. And as you can see, this doesn't look good for you guys, keep the call. But then once it comes time to actually create an invoice... let's see. I might need to talk to the support team and figure this out what the best option is. There is a good option. I'm just not landing on it right now.

MARIBETH

57:51 If I go back to the work order... and then invoice the job and then maybe create a new work order for or a new invoice for the monthly cost, probably recurring invoice. This is going to be the easiest way for you because you can just set up the monthly cost to be sent to the customer as a recurring invoice. But then you guys can still see what you've consumed and what you've used... like a master invoice. I might need to talk to someone on my team and figure out that there is a solution. I'm just not kind of putting my finger on what the best processes for you. So right now, what, how... how are you guys track any? So that there's not a great way to track it, but are you just generating an invoice out of your accounting system? And then once you guys kind of like get like you said six to eight months in, you have a better understanding of like what you're collecting because obviously you're consuming a lot more upfront since you're spreading that built out across the 12 months?

MIKE

59:02 See it's time of service. So, whatever hours and whatever material belts can symbols, we'll charge out to the job on that work order... and then kinda use like a progressive billing type of due. The idea is you would create one work order for that abandonment for that year, right? So you would just charge your time and material to that work order for each visit. And but the... the problem is... is then there's no, then you have to have some sort of progressive billing built into that because... you're building a monthly, right? But the work orders open. So it's not closed, right? So your invoicing on an open work order, so to speak?

MARIBETH

59:55 Yeah. Yeah. I think that... that, I mean we could, that's tricky. Yeah, we... we could definitely do it that way because you can see we can have a single work or... or multiple invoices associated with the single work order. So maybe that is the better way to do it. I mean, honestly, I think probably recurring invoices is probably your best bet and you can just set up both there. But you said it's time and materials is not necessarily a set amount even for the quarterly even for like the PM services.

MIKE

1:00:29 I'm sorry, what was the question?

MARIBETH

1:00:31 Did you say that it's like the invoice and it might not be the same every month that it's like it might depend on if you guys use different things or are you billing the

same amount every single month?

MIKE

1:00:43 Same amount every single month.

MARIBETH

1:00:45 Okay.

MIKE

1:00:45 Hello? Mountain.

MARIBETH

1:00:46 So, yeah, I think probably recurring services or recurring invoices is going to be your... your best bet or you can... you can have a master job for the whole year and what you guys use and send your an invoice monthly off of that job, just like how you guys are doing it right now and you can have multiple invoices associated with the master job. And then when you create the actual job that, you know, you're dispatching to the customer that are dispatching to the technician that has the scope of work for this visit, then you probably just wanna zero all of your items and things like that. And so they have the scope of work and that, but... let's see... that might not be a good solution either. I think I'm gonna talk to the support team and see what our other customers are doing and give you a better guidance that way.

MIKE

1:01:41 Well, I appreciate it.

MARIBETH

1:01:42 I think that there's more than one way to do it. The best way is probably the recurring invoice. The second best way is maybe a single work order that you can have instead of having yeah a single work quarter with multiple visits that designates the quarterly visit with multiple invoices that you're sending each month.

MARIBETH

1:02:05 Okay.

MARIBETH

1:02:09 So, I'll check... I'll check with them and see what the best way is. But ultimately, what you're trying to accomplish is we want to know how much our cost is over the life cycle of that... of that like annual PM service?

MIKE

1:02:27 Yes.

MARIBETH

1:02:28 We want to send monthly and or quarterly invoices depending on what we've accomplished with the customer and we want to have oversight in terms of what our job cost is and what our margins are over the life span of that commitment of work. Am I missing anything?

MARIBETH

MIKE

1:02:50 No, thank you. In a roundabout way. Got it.

MARIBETH

1:02:54 Okay. Alright. So I'll check with them. I think probably recurring services is the best that are recurring invoices. I keep saying that wrong. Okay. So let's see. So we talked about setting up your preventative maintenance services, being able to pull a report on that.

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MARIBETH

1:03:17 The mobile application. I know that we have it's not a deal breaker but it's an obstacle in terms of the clocking in and clocking out. Otherwise, it sounds like it's a little bit more comprehensive for the technician. It has more information. It's has the pretty good ease of use... communicating all of the information back and forth between the office in the field, the customer interaction. So, I mean, what... what are your, what are your thoughts so far?

MIKE

1:03:50 I can't find my mute button.

MARIBETH

1:03:53 Want to be muted?

MIKE

1:03:54 No, I was trying to unmute it. No, I didn't I'm sorry, that's good because my... my kids running around again. So, no, I think everything sounds good so far like again though, the part that, you know, obviously we need to work this part out but, you know, the other pieces, I'm still trying to figure out the time management piece, but I'm glad you see the I'm not the only one is perplexed over this billing piece because there's a lot of moving parts to.

MARIBETH

1:04:24 Yeah. And what I'll do is I'll talk with the support team and then I'll record a video and I'll let them tell me how our other customers are doing it because they're the... they're the ones who are really like engaging with the customers on a long term basis. And I will just record a video and send over a video in terms of the process and the best way to do it. But in the meantime, what I'll also do is send you some information about the recurring invoicing because that's where that automation is gonna come in. And then what can do is you can't just like the service opportunities where you can see, okay here's everything that I have in terms of what I've

committed to the customer and services that I have upcoming. You can also do that for your invoices as well. So I can pull list of hey here's. All my invoices that I need to send out. This is a quarterly Bill and then we can just create the invoices this way and send it. So, but I'll check with them and I'll record a video and send it your way.

MIKE

1:05:26 Okay. That sounds good.

MARIBETH

1:05:28 So last time we talked, I think you were looking at a couple of different products, Bill box, calm, you soft. That's a bunch of things I hadn't heard of varies. So pleased with any of those.

MIKE

1:05:40 So the two that we're probably still engaged with right now or BuildOps and... Salesforce?

MARIBETH

1:05:51 Yup. Alright. So BuildOps. Yes, I've heard of Salesforce lightning. Okay. I may have a budget of I guess like one, two 2000 dollars per month. I don't know much about BuildOps, but I don't think Salesforce is going to be able to come in.

MIKE

1:06:16 You surprise what we're working through right now with them. So it's actually not as bad as I originally thought it was because I heard all than they heard all the... the approaches on... on how expensive it is. But after sitting through some of it and having them crunch the numbers from a several times, I think we've got it under or in within the range of where kind of where we are right now. The implementation costs is a little bit more from what I'm seeing but the monthly recurring... is within range, say.

MARIBETH

1:06:52 Okay. Alright. So... I know that we kind of talked a little bit about pricing. I don't but I, what I can do is kind of send a recap of everything that we've talked about so far. Would it be helpful to provide any type of pricing for you guys?

MIKE

1:07:13 Yes.

MARIBETH

1:07:14 Okay. I know you said that you wanted to make a decision between now and some time at the end of April for like... maybe late summer fall?

MARIBETH

1:07:28 Who else on... on your end? It's gonna maybe need to see whatever products that you guys narrowed down to?

MIKE

1:07:36 Once I have it narrowed down to... to... then, I would probably involve my ops manager and I would also invited my CEO to ultimately help me make the decision on which way to go. But basically, I'm doing all the heavy lifting and going through the vetting process to whittle it down to what I believe after talking with them and our field would be the... the essential and wish list items all in one and also still try to create some sort of budget because obviously, we would like everything under the sun and I don't know all time can we make that happen? So, but just making a smart decision that's gonna help scale us for the next five, 10, 20 years without having to make great initiatives or make another change anytime soon?

MARIBETH

1:08:28 Yeah. Yeah. That... that makes perfect sense. You want to kind of future proof your business. So you don't have to go through this process all over again. Yeah.

MIKE

1:08:37 As lovely as it's been talking to you, yes, it takes up a lot of my time demo way, all these softwares and, you know, like I said, some of them bleed together? But luckily, I've been remote so.

MARIBETH

1:08:52 You haven't even and you haven't even gotten to the implementation part of it? What do you think is the most important thing for the ops manager in the C? He?

MIKE

1:09:06 I would say user friendly interface with the field. I'm not taking away from anything that they can currently already do and just better reporting metrics, more accurate forecasting really using it as a tool to help us add value to our business. I don't think we can get that with what we have right now or I know we can't get that with what we have for it.

MARIBETH

1:09:32 Right. Alright. Well, well, here's what I'm gonna do. I'm going to send a recap of what we talked about. I'll... I'll put a quote together for you guys. I will talk to the support team and get you the answers to those questions. I'm going to send you some additional.

MIKE

1:09:52 Formation about.

MARIBETH

1:09:53 Reporting capabilities and what we can do inside of service trade. And then when would be a good time for us to... to maybe connect? Or do you have like kind of

a timeframe on a narrow it down between sort of what we?

--- *Wrap-up* ---

MIKE

1:10:06 Wonderful. I'm wanting to follow up with me next Monday and we'll see if we can schedule some time for next week just because I know next week I'm all over the place and I don't know, let's go look at the change. So if you shoot me a quick little reminder Monday follow up kinda see where we're at, I can let you know what's going on.

MARIBETH

1:10:26 I will do it then I appreciate your time. Just do me a favor. If, at any point, you know, between now on Monday, you have any additional questions, just fire me off an email and response. So what I'm going to send you later on today and I'm just let me know if there's anything else that you guys need or any questions that come up?

MIKE

1:10:42 We'll do I appreciate your time?

MARIBETH

1:10:44 I appreciate it. Mike. Have a great rest of your day.

MIKE

1:10:47 Thank you very much.

MARIBETH

1:10:47 Thanks bye.

The End