ServiceTrade Demo with Speelman Electric Inc

Daniel Geary with Speelman Electric Inc
Recorded on 12/1/23 via Zoom, 1 hour 7 min.

Participants

SERVICETRADE

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SPEELMAN ELECTRIC INC

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OTHER

Topics

Transcript

ANGELA

0:00 Yeah.

DANIEL

0:03 Good afternoon. This is Danny.

ANGELA

0:06 Hi, Danny. It's Angela and mark here.

DANIEL

0:08 Hey guys. How are you?

ANGELA

0:09 Go ahead.

ANGELA

0:10 Good.

DANIEL

0:11 Appreciate you taking the time to meet with me today.

ANGELA

0:15 Yeah, no problem at all. So.

DANIEL

0:19 Just kinda give you a quick background today. Again. I appreciate your time.

--- Purchase decision ---

DANIEL

0:23 You know, I'd like to spend a few minutes with you all. Just kind of understanding what brought you to today's. Meeting, what has you looking at software? If you have specific expectations that go along with the software, you guys are looking to find a technology partner for the future that's typically where I like to

start just to ensure that we're a good fit for you guys and we can make that recommendation and move forward, or not.

--- *Type of work* ---

DANIEL

0:47 But yeah, if I could get just a quick, you know, background on you guys. And what has he looking at software? Excuse me, that would be a great place to start.

ANGELA

0:56 Yeah. So... I mark, but I run the service department. Okay. We are a commercial service departments. We mainly do obviously commercial service work. We do quoted work as well as time and material work. All of our quoted jobs are usually on a smaller size scale. I would say on average probably 50,000 and lower as far as quoting work. Anything that's larger than that would go over to our Construction. Really, the reason we are looking at some software is back in 2016.

--- *Paper process* ---

ANGELA

1:39 We got away from see, you know, having everyone come in the mornings and do hand on their paper, their work orders for the day we got away from that, we went basically to fill PD, if you will be using that. Do you know all conversations? Everything communication is through e-mail and sometimes that can be kinda disastrous.

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

ANGELA

2:03 You know, we ask our guys when they go out first, let me back up, Angela, job is created. Angela will send them a two sided PDF and then they will fill that out in the field for each job, send that back as well as sending that back. They will send back pictures and that stuff before and after what they've accomplished.

--- *Paper process* ---

ANGELA

2:27 And then later in the day, they send your time in a separate e-mail it just seems like there's some efficiencies. Obviously, we're living in e-mail and sometimes things get lost or overlooked because we get inundated with so many emails, you know, every day from customers and everything else.

--- *Paper process ends* ---

ANGELA

2:45 So, just trying to find a way to kinda streamline everything. Also. We're definitely interested in, you know, seeing, what types of AI could help us, you know, maybe

some more of our own time to do other things. So.

DANIEL

3:02 Yeah, absolutely. You know, just to tackle that one, I'll send you guys a link to we're having an AI webinar, December seventh. I'll send you the link to sign up. You can either, you know, attend if you don't attend, unfortunately, you know, a recording would be sent to you but yeah, we're we've adopted, been working on a I for the last year and, you know, our services team faded out, you know, what they're doing.

--- *Customer engagement* ---

DANIEL

3:28 And essentially, it's going to be useful, maximized time. So scheduling efficiencies being able to take, you know, work orders and simplify the reporting and metrics around that, turning it into a more customer centric invoice and report based on data that was there and what AI would promote you to put in. So yeah, a lot of different metrics that we'll be discussing how AI can be, you know, really give you a lot of time efficiency, but also grow your business based on if you've got a bunch of jobs available, I will take all the work that you have, let you know which technicians qualified to do that, which ones are your most gross profit jobs. Let's get those done first. So if you're excited about that, that's there's a webinar. And there's another link I'll send you after this meeting that you can, you know, better understand how we're using that, to our advantage in the platform?

ANGELA

4:16 Okay, great. Awesome.

DANIEL

4:18 Did one of my guys mentioned AI or did you see that on the website?

--- *Customer engagement ends* ---

ANGELA

4:22 No, actually, I went to a service meeting. It was held in Colorado, okay? Through Nika. Sure. Last year, it was the first annual service meeting and, you know, there was some talk there just kinda talking with everyone around the country, which is which was nice, you know, talking to a lot of people in California and stuff who usually is progressively ahead of where we are. It just kinda seems like it starts on the, a lot of times it ends up over east. You know, there was, you know, we talked, you know, several people there about a, and, you know, whatever one was looking for. So, it was a topic there. And then, you know, I gotta believe like I said, last time we did, it was 2016. I know technology has definitely move forward and we're just seeing what's out there to see like how can it benefit us on the day to day?

DANIEL

5:18 Yeah, yeah. And I'm absolutely. I'm happy to provide that for you. Yeah, there's been a lot of AI talk and it's just the way it is. So you wanna make sure whatever

direction you guys go with, that technology partners, you know, not just talking about it that they're already involved with AI, because if you're not, you're you know, I don't think people I didn't personally realize how far AI had become and actually how many people were using it two and three years ago, never mind today.

ANGELA

5:43 So...

DANIEL

5:44 Yeah, that's a big part of what's going to separate us from a lot of the competition is the fact again AI is already been incorporated for over a year now. And so you'll see some of that stuff there.

ANGELA

5:55 Okay, great.

DANIEL

5:57 As, you know, I appreciate the input there, mark, Angela.

--- Paper process ---

DANIEL

6:01 Anything on your end, you know, whether it's you know, what your day to day responsibilities are, maybe what can be more efficiently done on your end? Is there, any input you'd like to offer?

ANGELA

6:11 I mean, I would say like just, he talked about like everything's in our e-mail I also am the person who dispatches everybody. So we live in an excel spreadsheet for scheduling purposes. You know, we're doing a lot of double entry, you know, just trying to streamline and really free at my time to do other things because we, because of all that, we don't have enough time to customer follow up or, you know, even branch out to get more customers and things like that. So I think we're just trying to make it easy for the guys. It has to be easy, for Tricia. We have our electricians here, have been with us in our department forever. So it's kinda like they're old school, it has to kinda flow. And then, you know, makes sense for us as well.

--- Accounting integrations ---

ANGELA

7:00 The biggest thing that our company, our owners are is like double entry if it's if we can't like, right? I talked to, I can, Brian, I think his name was like we use spectrum tremble and we, you know what I mean? So I don't know if there's any way to integrate the information being and put to that or not. So that would be one of the things.

--- Pricing ---

DANIEL

7:24 Yes, it is. There, we have an integration, with spectrum with the triple integration there. It is. It's just to be upfront. It's a 12,000 dollar annual cost. And I think you from other competition I've spoken to that's where, you know, most people are really, I think 10,000 is, the cheapest I've heard people at 15 grand, but there is an integration, right?

--- Accounting integrations ---

DANIEL

7:47 Absolutely. It's there. We've got a company that we work with, that, right? The, the integration we've got customers that utilize that. So again, that if that is a what's the word I'm looking for? I must have back of lack of better words. It's 100 percent there.

ANGELA

8:04 Okay.

ANGELA

8:06 Yeah. Like how it integrates or what it integrates like.

DANIEL

8:10 Yeah, we would a scoping call. I don't have that information readily available to you as far as to demonstrate it, but we've got, our accounting partnership team that would, you know, provide an actual demonstration to show you how the integration works.

--- Implementation and ongoing support ---

DANIEL

8:26 So if we get to that point, just know that, you know, we'll have an explicit dive in to the integration. So that way again expectations are key throughout this process. Integrations are complicated. They're not fun to set up. So there's they'll be, you know, at least one meeting around that with your team that you'll be able to see what the integration looks like and make sure that the data mapping, is what you guys are expecting?

--- Implementation and ongoing support ends ---

ANGELA

8:49 Okay. Bye.

DANIEL

8:52 Yeah, but other than that, yeah, I'm excited to show you that. I'm feeling a little bit under the weather. So sorry, for my demeanor and not as excited. But, you know, I'm a former electrician myself. I'm still licensed. So, you know, we sell service trade

to, the map contractor and fire life safety. So when I particularly work with electrical contractors, I get a little bit more jazzed up just because I live that life. My uncle owns a business back in mass. I was licensed for eight years working with them until a couple of major shoulder operations. So it took me out of the field and loan behold five years later. When I moved to North Carolina, I looked at software sales. And the first company I met was with people that work with contractors. So I have a great understanding of, you know, the challenges that field tech definitions have whether it's inputting data, having service history, taking the picture, waiting to the end of the data, filling out the work order. Then that never happens because we get called on under things. And now the admin is burdened with like trying to get the follow up game figured out. So our goal is to be an end to end solution from the field to the office. And then how are you channeling that information, communicating with one another? But more importantly, how are you setting the expectations with customers as far as how do you communicate with them? That's going to be the of our triangle as far as how you utilize the platform? So, any questions around, you know, before I jump in, I appreciate all the input and information.

--- Purchase decision ---

ANGELA

10:13 I think we'll have.

ANGELA

10:14 We may have some as we go along, but yeah, we're just, yeah, kinda curious to see, you know, how it.

DANIEL

10:20 Definitely. So, you know, a little bit.

ANGELA

10:22 About...

DANIEL

10:22 Us, I'm gonna show you a little quick slide deck and we'll hop into the platform, but we've been in business for over 12 years.

--- Purchase decision ends ---

DANIEL

10:28 We now have 1,300 customers, 30,000,000 assets managed, and we've invoiced over seven point 5,000,000,000 dollars in revenue. So, I say this because we're a trusted technology partner in this particular industry. In fact, I just got back from la last year at the great service forms. I don't know if you guys have any ties with great service forms or an electrical comp, you know?

ANGELA

10:50 We, we did, we Fred his name?

DANIEL

10:56 Yeah, yeah, I wouldn't spoke there. I think it was last year when they were out in Philly.

ANGELA

11:02 Yeah, we do that.

ANGELA

11:03 We Columbus to.

DANIEL

11:07 Yeah. So, you know, again, we try to stay involved, right? To make sure that we know where the industry is trending and we can make sure our technology is trending that way.

--- Customer engagement ---

DANIEL

11:17 So, you know, what our goal is again help you guys control costs, grow quality revenue. So from here, it's really about managing your jobs, but most importantly making sure that your technicians have the tools they need. So you guys can efficiently, you know, efficiently fill out more jobs, quota additional services, go find new customers.

--- Type of work ---

DANIEL

11:36 And that's what we're geared up is helping you guys win either more projects, more service agreements. Do you guys have many service agreements currently? Is that a part of your business? Do you guys offer any like maintenance work or, any contract work?

ANGELA

11:50 No, I mean, we have like, we have one guy set up and he's there 365 days a year at a manufacturing plant, electrician, that through us.

--- Type of work ends ---

ANGELA

12:04 But beyond him, no, I mean, we do like I need scanning, which we do have scanners, but beyond that every five year mark, you know what I mean? It's usually for insurance purposes, right? A lot of those, no.

DANIEL

12:20 You know, that always baffled me when I got in this industry and work with mechanical and fire life safety companies. They well, fire and life safety required quarterly mechanical. They offer quarterly contracts to their customers. But at the end of the day, like if the electrical equipment is not functioning properly, none of that stuff works, right? And so as, you know.

ANGELA

12:37 I see.

DANIEL

12:39 Analyzed requirement to say, you know, you've got this building with X amount of tenants and souls, you know, above you with all this equipment maintaining, you need to come out your yearly to just make sure, you know, do your info at testing, do your, you know, routine check? I'm surprised that that's not a thing, you know.

ANGELA

12:56 Right. I agree 100 percent on actually that was the main, my main objective for going to that nice service conference because I wanted to see what everyone else was doing selling service contracts because all the people around us, they live on those that's their bread and butter, their service contra.

--- *Customer engagement* ---

DANIEL

13:14 And it's a revenue.

ANGELA

13:16 Out there it is, it's crazy. No one really is doing it.

DANIEL

13:21 And I'm telling you, the first people to jump on board, it's just gonna grow but it's I don't know. I just, I never understood it but it's so, I think we'll have a big impact because what it is, the service agreements are great, but where you get the revenue is on the repair.

--- *Deficiencies* ---

DANIEL

13:35 So you go and do in your inspection, you're like great. Hey, we found we've got replace like seven breakers and, you know, maybe put in a junction box or add a second panel, right? We're overload. Well, that now that inspection, that one dollar that you spend on inspection, just turned into five dollars and repair revenue which was, would never be forecasted or found unless there was a service agreement tied to it other than that, you're waiting for the customer to call you to let you know the breakers burnt and they've tried tripping it, you know, they tripped it seven times and now they're calling you, right?

ANGELA

14:04 So.

DANIEL

14:04 Anyways, that's a little bit off record, but yeah, I off topic, but I feel like in this industry, the service agreements can be very powerful and we do a really good job of helping you know, the mechanical contractors sell that to their customers to get pulled through revenue. But at the end of the day, it's about, you know, profitability and loyalty. So you're gonna see service trade is not only going to help you internally but communicate with customer. So in short, we're going to track all your jobs, projects and service calls for all your projects that are under 50 K, right?

--- ST app contracts and pricing ---

DANIEL

14:33 Within service trade, you'll manage that project, the phases scope of work, understand the billing. If you have any change orders, you need your whip reporting, right? All that's gonna live within your project... that's all dependent on your field technicians, right? These are the guys out in the field that are giving you the information for you all to take the next steps.

--- Deficiencies ---

DANIEL

14:51 So we make it incredibly easy for them to just let you know time and material, snap a couple of photos. If you're on a service call, you've never been to that location before, take a look at that panel, see what was replaced or who was there. And then if you identify any other type of work that needs to be rendered, you can either complete that or let me know in the office.

--- Deficiencies ends ---

DANIEL

15:11 So I'll quote it out to the customer. Those are the five main windows that your technicians have to utilize. Day to day. It's very easy for them to just click in, take a picture. And the important thing that you guys mentioned, it's all captured on the work order.

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

DANIEL

15:25 So the picture, the note, my time card. So I'm gonna let you know how long it was on site for how long it took me to get there. Everything that sounds like you've got, you know, the PDF e-mail in excel will all live on the job for you guys to instantaneously just generate a quote or an invoice from right here.

ANGELA

15:42 Okay.

ANGELA

15:43 So...

DANIEL

15:44 And then lastly, you know, once you complete a job, right? We make it easy to just send a post service report to your customers. So instead of them getting an invoice for 15 grand or seven grand, here's, a quick report that we pulled off all the information gathered by the tech of the before and after picture and whatever data you want to send.

--- Customer engagement ---

DANIEL

16:02 It's just a nice ease into the invoice itself. And then as you're looking at your business as an overall, you know, our middle tier performers are growing at 30 per seven percent annually, right? And that's based on the operational flow of trying to generate more business by creating more efficiently for technicians and office admin. So that's really what, we're gonna dive into today.

--- Access to information ---

ANGELA

16:27 Okay.

ANGELA

16:29 So...

DANIEL

16:30 You know, a little bit about service trade. Again, this is a cloud based platform. So when you're out in the, when you're in the office, you're gonna log in, everybody will have their own log in and this is going to be the homepage. Up top would be the reporting.

--- Access to information ends ---

DANIEL

16:44 Anything that you'd ever need to find out about your customers or internal information would be up top. And then down below is our dashboard and our dashboard is pretty simple. It's designed just to give you an overview of what's happening today and then anything upcoming. So you'll have a daily schedule. You'll have any jobs that have a due date that haven't been dispatched, show up as overdue jobs. But most importantly, as that works being completed by your field technicians, they're gonna land in past jobs you mark completed. So that way the office gets a

notification saying, hey, we've got a work order that needs review. Your admin reviews that work order. And as soon as they mark it off as that will flow into all the jobs that have been reviewed and ready to be invoiced. So service trade will update the status for you guys. So that way you're not having to let Ar, the billing or the coding manager know the next step as you're completing that work, it will go into the next phase for you guys.

--- *Access to information* ---

DANIEL

17:39 Okay? So I think what I wanna do here is I'm actually gonna pivot and I'm gonna start in the mobile app. So let me just go ahead and share my mobile app screen and then we'll finish the rest of the meeting in the office.

DANIEL

17:56 So, you know, this is what we're looking at as far as your field tax, right? When I log in my fire account, let me log into my mechanical. They're gonna see their schedule for the day, right? Pretty simple.

DANIEL

18:17 Okay. Let's try this again. So when I log in as a field tech, I'm gonna see my schedule for the day. Let me pull up full screen for you guys.

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

DANIEL

18:26 So if I wanna see what I have lined up, it looks like we've got a service call at wilberham once an academy. So as a technician, I go ahead and I open up that job. Now, a few things can happen here, right? These are all internal measures you guys will take depending on what's important and what you want captured. So from here, I can clock in, I can let the office know that I'm on site. But if I want to let the customer know that I was in route, maybe I got dispatched this call. I can clock in and even notify the customer that, hey, I'm on site. I'll see in a little bit... from there. I'll go ahead and drive if I need turn by turn directions. We'll hit them here. And then once I'm on site, I just let you all know that I'm here and I'm starting my services for today. So under the service window, whether this is a project, a service call, any type of job services window is to let the technician know what's happening and why they were dispatched out to this location.

--- *Assets* ---

DANIEL

19:20 So as the field tech, I can go ahead and say, all right, I've never been here before. Can I see all the equipment we maintain? I can look at the panel. I can see if there's any history of the efficiencies or repairs, any work orders or any type of significant detailed information tied to any asset that you guys manage within a particular building.

--- *Deficiencies* ---

DANIEL

19:41 But let's just say I go. And again, the service call was Angela call to let us know there's no lights in the gymnasium. So whatever it is that I go, I start troubleshooting, maybe I find that we've got a bad breaker in the panel. So under attachments, I go ahead and I can start telling the story of what was done. So I can take a picture. I record a video. There's many things that we can do here. It looks like I don't have.

DANIEL

20:15 All right about that. I got a new phone and I have to turn on the device here.

ANGELA

20:20 I'm sorry?

DANIEL

20:21 Anyways, your guys can take pictures. They can record audios. Let's try this one more time... and they can add a note to this picture, right? Bat breaker.

DANIEL

20:37 And again, the goal here is for them to tell you everything that happened. And if they're terrible note takers, I can actually add a audio memo just to let you know how the job went. Did a walk throughout the gymnasium, didn't find any issues, found a bad breaker here's. The breaker that I replaced it with and any other information they need to share along this call.

--- Quote templates ---

DANIEL

20:57 So they can save that. So that way you guys can listen that back in the office, they don't have to worry about keyboard wacking everything they've done. Now, we're going to let you know time and materials. So under job items, this is where I can just go ahead and add my parts of my time. So I would go with the scroll through a list of parts or just type in breaker, and we'll look for those to populate. I'll let you know how many I've used and we'll add that same thing for my labor. I'm going to let you know how long it took me to get to the job and we'll save that as well.

--- Parts management (inventory) ---

DANIEL

21:28 So here again is where your technicians would source through any parts that were used and add all their labor and material onto this particular job.

ANGELA

21:38 Where does that parts list come from? Where does it originate?

DANIEL

21:42 This would be your parts list. So where does your inventory live today? If you guys track?

ANGELA

21:49 We, well, we track it per truck. So each guy has their own truck. So they each have their own inventory, on their truck. We have a standard inventory like list that everybody should have on there. So I guess that would be where it would be from. But yeah.

DANIEL

22:07 So, is it a manual? Like when you say you have a you're tracking inventory per truck. Now, does that go back into a software? So you can see we've got 20 breakers across five trucks plus our main warehouse. Where does that inventory reconcile? I guess.

ANGELA

22:25 It, it, we put it into spectrum because we use spectrum for everything. So that's where then we run a report like every two weeks and we hand it to the guy. It says like this is what you need. We need to like reorder because this is what you use on your truck.

DANIEL

22:39 Okay. Perfect. Yeah. So you'll see that when you go to put your line items in, if I edit this item here, it's gonna have a source on. So that way you guys can see this either came off of a truck or a particular warehouse. So you guys have different options. So that way at the end of the week, you guys are able to reconcile here's. All the parts that were pulled off my Van, we'll go ahead and update and stock though. So when you set up your license in your permission settings, you can set each users up to a truck or however you want to track our inventory. So that way you can have that reconciliation, of consumer goods.

ANGELA

23:16 And then how does the pricing now? Because there is pricing in there.

--- Quote templates ---

ANGELA

23:19 So like when we do like our original dump in with the pricing be in there. And then how does that get updated?

DANIEL

23:25 Sure. So, yeah. So whatever you have currently to, you know, when you talk about pricing, there's two different ways of pricing. So we're gonna take all of your items in, right?

--- ST app contracts and pricing ---

DANIEL

23:32 So your item would be any time and material. Every item has a cost associated with that, that's all gonna come over. The other piece to that is you may now you probably have specific price books tied to a customer location or a job type that's also gonna roll over.

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

DANIEL

23:49 So once this job is, has been completed, we're going to turn this work order into a invoice based on the price book that this customers falls under. So we'll track all that. And I'll, show that to you back in the office. Really what that looks like?

ANGELA

24:05 Okay.

ANGELA

24:06 We're I'm sorry, you kinda lost me there. Sorry, Danny, the pricing gets updated... how?

--- *Accounting* ---

DANIEL

24:17 So during onboarding, you're gonna send over like your customers, your locations, your items, your pricing list, you're gonna send all that over. If you were to move forward with service trade via ace, or a CSV file, my team then imports all that into service trade. So that way when the data mapping happens, everything is exact from your accounting software and service trade.

--- *Invoicing* ---

DANIEL

24:40 So when we're sending back reconciling the invoice, the Ar, the time material payroll that's dictated by the information that's in your accounting software that is now in your service trade account. So it's gonna mirror all that information. So the integration works properly.

ANGELA

24:56 At the beginning. But then, how does it, how does it change throughout?

--- *Access to information* ---

ANGELA

25:00 Yeah.

ANGELA

25:01 I'll show that.

DANIEL

25:02 Back in the office, we can't do that in the mobile application, but you would update your pricing either in service, trade your accounting software, and then that over. So, yeah, that's pretty simple process in the office. Yeah. So again, this is just for your text purpose here.

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

DANIEL

25:18 This is just showing the workflow of how they're filling out information. And then again, once they're done, they would just go ahead and clock out. One thing I didn't ever go ahead.

ANGELA

25:28 I'm sorry, real quick. Was POS, there's you know, the right now the, our guys are right POS in the field. Is there a way for them to get a po out of the system or, yes?

DANIEL

25:40 Are you guys generating that from spectrum or where are they pulling the po from? How do they, how do they figure out how, you know, what?

ANGELA

25:46 Right now? They have to go on our website... and there's a spot that's on there for them to pull POS that fill out job, you know, job number name, you.

ANGELA

25:58 Know.

ANGELA

26:00 The, if there's a phase code or anything like that, and then it spits them back, a po number. So it's automatically... creating the POS.

ANGELA

26:13 Yeah.

DANIEL

26:14 Okay. So what happens here is under the parts look up part. I can also request a po. So what's going to happen, is we see what job I'm on gonna pull that information? I'll go to a supplier. So you'll have all your suppliers in here. So let's just put acme supplier and I can go ahead and create a po. I can also look for parts.

Maybe I don't have one on my Van. I want to see if somebody else has that. I can look up some type of widget and see where that widget is. It will tell me how many widgets. I don't have any there. But again, I can do transfer stock. You'll do all that inside the mobile app here. But by creating a po, this is now gonna trigger a request to the office to let you guys know that your technician just create a po, and then that will roll over onto the work order for you guys. So that will all be done within service straight for you.

ANGELA

27:03 Okay. How many times?

DANIEL

27:08 Would you say your guys staff at the supplier to pick up parts? How many POS are they generating a day?

ANGELA

27:17 It really varies. To be honest, it depends on how much service work we're doing the quoted work. If it's quoted work, you know, we will always have the materials supplied for them and just picking up and then go under way. If we get, if we're doing a lot of service work that's when we would see, you know, the uptake of them going and create their own POS to get what they need to finish the job. So I would say average, what would you say? Maybe 15 a week?

ANGELA

27:44 Yeah, I mean, maybe.

ANGELA

27:46 It's so hard to say. I mean days we're just pounding post, we might go a week and not everyone's on quote and, we don't do any, you know what I mean? So.

DANIEL

27:55 Yeah. Well.

ANGELA

27:56 That...

DANIEL

27:57 It's available to you guys if you need po, if you need your technicians, being able to generate a po on the fly that will all come back to you guys. You guys get notified, the job item gets updated with the po and the actual costing of the part based where, which wholesaler you got it from. All that magic will happen on the back end. Okay? The last thing just so you guys know if a technician is ever on site, we can create repair opportunity.

--- *Deficiencies* ---

DANIEL

28:21 So if there's a repair that I found that I can't make, I would call that a deficiency and just fill out a quick form. So that way that would trigger the office and alert to say, hey, I need you to generate a proposal.

ANGELA

28:32 Okay.

DANIEL

28:33 Like this, we're gonna ask them, give you a brief description of what you... take some pictures of what you're looking at, let me know the severity of the problem. Let me know what piece of equipment you're working on. So that way we quote out the right services. And then lastly, is this a new opportunity? If you fix it? Sit on seeing? Great, let us know so we can build for that. But if this is a repair that needs to get quoted out from an office admin, go ahead and inform us in the minute I hit save an alert goes out to your office, letting you know that, hey, Danny is on a job and he needs you to quote out additional services.

--- Tech On-site ---

ANGELA

29:09 Okay.

DANIEL

29:10 And then from there, you know, there's a couple of things can happen. If you need to get a customer signature before your guys left, we can create a work acknowledgement. If I need to invoice from the field. If I need to invoice this job and collect payment before leaving, we can do that or I can clock out of the job, let you know that it was complete.

--- Deficiencies ---

DANIEL

29:29 The last piece here is if there's certain information that you want filled out on this work order, before you allow me to clock out, you can set that up for each user. So I forgot to leave a comment. I didn't leave a memo, but I'll go ahead and leave you a comment, replace the breaker lights are not working.

--- Tech On-site ---

DANIEL

29:49 There was no EPA deficiencies, bounce. We'll save that. And then we can clock out. So again, you got the autonomy to control the information to make sure that when this work order comes back from your field text, you have everything you need to ensure that you can take the next step and... schedule a follow up.

--- Forms ---

ANGELA

30:09 Now, sometimes we have like management companies that require us to get signatures on their documents. Is there something that could happen there?

DANIEL

30:16 Absolutely. We would call that blank paperwork to give you an example. If I hit the view, more details button, you guys can upload paperwork to either a job or allow your technicians to fill out a form, or if it's something your customers need to sign off on, they can certainly do that with any paperwork that you guys have.

ANGELA

30:36 Let me just sign it from inside the app.

DANIEL

30:39 It's gonna go into a PDF. So a PDF fill a form. So I've got Adobe on my phone. So it goes into Adobe for me to fill out.

ANGELA

30:48 Okay.

DANIEL

30:50 I'm done with this, right? Once I fill all this.

ANGELA

30:56 Does the form stay in ServiceTrade then?

DANIEL

30:58 Yes. Yup. Okay. It will log onto the job and I'll show you where all those forms, will live. The other thing there. If you know, the form that needs to get assigned out to the technician, you can just put that paperwork right on from the office. So they don't have to figure out which form they need a lot of my third.

--- *Access to information* ---

DANIEL

31:16 Like if you're doing work at payless and doing service channel work, that's the method that you'd follow, is the paperwork?

ANGELA

31:23 Okay.

ANGELA

31:29 So...

DANIEL

31:29 Any questions?

ANGELA

31:30 Around the mobile application, you know, like immediately, anything in here that goes to your desktop kind of thing, like is it a mediate?

DANIEL

31:43 Yes.

--- Tech On-site ---

DANIEL

31:44 You mean as far as like information? Yeah. So if I open up this job here, you'll see... everything that was filled out?

ANGELA

31:55 No. What if they're in an area that they don't have any service is when they just come back once they get into service, like.

DANIEL

32:04 That's correct? So they will have 95 percent capabilities. If they don't have any service. The only thing that they won't be able to do is click into a job and us be able to take a snapshot of their Geo location. Other than that, they can fill out the work order, pull up their history, do the work as status quo.

--- Access to information ---

DANIEL

32:22 And then as soon as the device picks up a signal, it will automatically push over to the office. There's no manual push for the technicians or office to hit a button to sync. That's the cloud based side of the mobile app. It will happen instantaneously.

ANGELA

32:35 Okay.

DANIEL

32:38 So, again, now that we're on this particular job, this is the work order.

--- Tech On-site ---

DANIEL

32:42 I got a notification that Danny just wrapped up his job so we can see that the services were complete. I can see any time and material that were used on the job. I

can see the clock events depending on which ones you guys choose to use. How long it took me to get there.

--- *Deficiencies* ---

DANIEL

32:56 Again. I'm nine Miles away from where I said I was. So, when your device has a signal, the benefit of the clock and event is it takes a snapshot of that technicians lot, location. We've got the repair that we need to quote out for additional services. And then I've got my attachment, the story of what happened before and after pictures and a quick audio memo from my technician.

--- *Quote templates* ---

DANIEL

33:20 Now, a couple of things can happen from here. If your technicians forgot to add a part or didn't put their labor in or you guys need to make modifications, you have the final say to be able to do so. So, again, Danny forgot to put his time in here. I'm gonna go ahead and do that for him.

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

DANIEL

33:41 And he had two hours on that job. Now, you're gonna have default pricing that's gonna create the markups for you automatically. But again, this is going to be your final review before it goes into an invoice state. Once we give the work order, the okay, we're going to go ahead and generate that invoice.

DANIEL

34:02 Now, from here... invoice that's gonna give you your gross margins story of what happened on this job. And then you can either send this over to spectrum to invoice from, your platform there, or you can utilize the service link and service trade. So you can see you can be as granular or non granular as far as how you display pricing.

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

DANIEL

34:27 And then you can send a service link or an invoice link over to the customer. And this is what it would look like on their end, right? They would get your company logo on the top left hand corner. However you're deciding to display information from this highlighted line down is completely configurable to you. All. What we'll never change is the top header here, your information. And then the two action items for your customers. One, they don't know what this service was for. They can click on details, and this would be a recap of a report that you're gonna do during onboarding.

--- *Customer engagement* ---

DANIEL

35:01 And in the future of here's, the information that was gathered on today's, job. And here's what we're going to expose to the customer. Got everything turned on. But just know it's just a nice way to let the office know and customers know who was there, what was done.

--- Invoicing ---

DANIEL

35:14 They can see that bad breaker. That audio file will be turned off, and the fact that you did find another issue while you're on site. So now they can actually come on here and say, great, I wanna go ahead and get this paid and you can offer various payment methods whether it's a po, credit card, AC H, and you can dictate that for every one of your accounts. So.

ANGELA

35:40 Credit card, like how, does, would it still use our credit? Like who we use?

DANIEL

35:46 So, no, this would go through. If they're paying through service trade, this would go through our credit card processing company, which we use stacks, go through our merchant account. If you're invoicing collecting payment through service trade.

ANGELA

35:59 Okay. What's the fee for using them is the.

DANIEL

36:03 Yeah, I'll send it over from what I'm told, it's very comparable to all the other merchant fees, but I can send it over into a document that I'll share with you at the end of this meeting.

ANGELA

36:12 Okay. Do you think it's like two percent or something?

DANIEL

36:15 Yeah, it's definitely in the two percent. I don't know what, the desk point is after, but I know it's two point something.

ANGELA

36:20 Okay.

DANIEL

And you'll have all the options, whether, you know, if you're accepting AC, H credit card, it's going to let, you know, everything you can expect for those types of charges or fees.

--- Invoicing ends ---

DANIEL

36:31 I should say, okay, so, as far as, the invoice workflow, I went through that rather quickly but, you know, what's your thought about reviewing the work order and being able to take that into an invoice and capture all, the material, the pictures... the payroll, the parts that were used, you know, what is your thought, in that whole process?

ANGELA

36:57 I mean, it looks like it flowed pretty well to me. I guess my only question would be like, how does that, what does that material there? How does it get into spectrum for?

ANGELA

37:07 That...

DANIEL

37:08 That's all going to happen on the integration. I'll send over some information for you. But again, if service rate direction you guys want to evaluate, I would set up a call so you can physically have that conversation around spectrum. That might be other people involved. I'm not sure, but... I'll send you over a document that has the data migration flow map. And then again, if we need to schedule a call further, I'm happy to do that as well.

--- Dispatch ---

ANGELA

37:32 Yeah, that flow map would probably be super helpful just so we can just kinda get an idea like how, what it sends back and forth, you know what I mean?

DANIEL

37:39 Yes, sure. Absolutely.

ANGELA

37:42 So, do you have like a, like, I know you just went right into that job that you were showing us on the app, but like ideally, like, I wouldn't be like managing it job by job. So, like, would you see a whole overview? Like how do you see the overview of what's going on?

DANIEL

37:57 Yeah, that would be through like our dispatch board, right? So there's a couple of different ways to do that. But your dispatch board, your best friend, as far as seeing what's going on, you may have different divisions within your company where technicians are qualified to work on certain pieces of equipment or different entities. So you can categorize your technicians under, those classifications. But here's what your dispatch board would look like. So you can see where your text are day to day. You're also going to be able to add any call. So if one of your customer calls somebody from over ham onto academy, we start to type that stuff in and that customer list deplete.

--- Dispatch ends ---

DANIEL

38:33 And now we can find Weber on an academy. And so from here, we would go ahead and verify all the information. And then we can go ahead and say, great this was a service call that came in today and we can either set it or log the call completely up to you guys.

--- Assets ---

DANIEL

38:48 But we'll go ahead and say the call came in today... and it is... say two o'clock we can save that. Why did the customer call? They've got no heat, which piece of equipment? This is in our electrical department. So when you guys are tying your metrics, you can come back and look at where you're performing... electrical controls.

--- Dispatch ---

DANIEL

39:14 And then again, we'll go ahead and save that description. Please go troubleshoot. And now this would flow onto, you know, your unassigned bucket one based on that department. But two, you're gonna have probably a jobs board that you're gonna wanna have up readily available to you and you can customize that queue board to make sure that anything you need to focus on that priority, you can put your hands on first. So again, depending on how you want to run that report, you can see you've got the job type service lines, the available technicians, the different regions, your due dates. And when you click on those reports, now, you're going to be able to see all the different jobs that you need to pull into queue and start assigning those out. So this is where you can get all those priority calls in place based on the jobs board and the availability and then start dragging that onto technicians, calendars and getting them scheduled out. This will also give you a weekly view. If you need it. You just wanna kinda have an understanding what's happened as well as a monthly view. So you have a couple of different options here as far as available work and jobs.

ANGELA

40:27 It's nice.

DANIEL

40:34 So, how does that? I know there may be some difficulty as far as visibility now, but as far as that type of reporting and in visibility is that, you know, along the lines of giving you a better kind of bird's eye view of what's happening?

ANGELA

40:48 Yeah, I definitely would say, yeah.

DANIEL

40:50 Okay.

ANGELA

40:51 Like it would be easier for like because right now, it's like me, I live in the schedule and dispatch everybody. But like if I leave for the day mark, then has to figure out what the hell's going on. You know, if somebody's job cancels and he's gotta reschedule somebody in.

DANIEL

41:06 Then he's calling you and you're trying to get out of there for the day, right?

ANGELA

41:10 Yeah. Phone calls, I help sometimes.

DANIEL

41:13 Sure. So that dispatch board will be your best friend. And then the dashboard itself, when everybody logs in, remember, you've got that daily dispatch to see what's happening. And then the map on the right hand side tells a story of all the work that's been completed relative to where technicians are clocked in. And then if you need to find a certain technician, I just wanna see what's going on with Danny, I can break that down and get an understanding.

--- Dispatch ends ---

DANIEL

41:37 So there's a couple of different options depending on who's looking for that data. But it's important to know what's going on day to day for everybody. So you'll have that visual for you guys at any time?

ANGELA

41:48 Is there a way? Because we have like two department managers? Is there a way to be able to say?

--- Dispatch ---

ANGELA

41:54 Like all the jobs that mark is managing and all the jobs that the other guy is Sean as manager, like he can like view his view or his people. Yes, people. Okay?

DANIEL

42:05 Yes, ma'am. Yeah. So we would set up different offices in different service divisions. So that way each individual user can either just see what's response, you know, what they're responsible for, or we can go ahead and say great. I just wanna see if Michael's got a guy is available on backlogged. So you can absolutely set that up to each individual user. These are all the different service lines we offer. You won't have all of them in your account. But then again, now you'll see my list just got a little bit smaller, right? It went from like 15 technicians just down to me in my office.

--- Type of work ---

ANGELA

42:39 Gotcha. Okay.

ANGELA

42:42 Service lines are created by what the technician can do. Is that how it is or?

DANIEL

42:49 Service line or the different services that you guys offer to your customers.

ANGELA

42:54 So...

DANIEL

42:55 This dashboard, you would choose like which services are applicable to your company, right? So we work with residential commercial contractors that do everything from hvac to install electrical panel. So you would just click all the different electrical components, lighting, all that stuff and have that in your accounts. That way when you're reporting, you can see different metrics where you're performing things of that nature.

ANGELA

43:17 Okay.

DANIEL

43:21 The last piece, I think, you know, unless you guys have any other questions would be, you know, the reporting in and the quoting in and the project side, right?

--- Deficiencies ---

DANIEL

43:30 So when we're reporting out and we're quoting out a job, it can either be for a repair or for maybe an install. It's going to be the same mechanism here. But what's going to happen, is if a technician does a deficiency or a site survey, your office is going to get a report to let you know the location, the equipment, the description, any attachments, files that are shared with that as well as any past history.

--- Assets ---

DANIEL

43:53 So if you've been out here seven times in the last two months, maybe we stop repairing the equipment. We just replace it, right? So you get an in depth view of just this one piece of equipment that we're quoting.

ANGELA

44:03 In a minute.

DANIEL

44:04 So again, this can be for any Installation service call, you name it.

--- Quote templates ---

DANIEL

44:08 It's there for you to quote out. We'll set the expiration for next week. And now in service trade, I'll generate a proposal that I'll have my customer review and sign off on. So in service trade, we're very focused on templates. So again, depending on what it is that you're trying to quote out if it's you know, I think I've got an electrical panel in here. Again, this is where you'd be able to enter that template in whether it's repair or install completely up to you guys. But I'm gonna do one that's got a bunch of information so you can see what the output looks like. So compressor replacement... you're going to have the terminology verbiage of work that needs to be performed. And then most importantly, you'll have your typical line items needed to quote out this job. So then I could take the information that was gathered by my field tech. Maybe he said it was gonna be a five hour long job and he's gonna need a helper on here.

DANIEL

45:13 So, again, the purpose is to be able to easily build out a proposal based on the information that was gathered by the customer salesman or service tech, put all your numbers in here, based on the template, you can display pricing however you'd like. And then you have a service contract that has specific mark up rules.

--- Quote templates ends ---

DANIEL

45:30 Everybody's got a default, but you can figure that out there and then your margins, right? So now, you can know exactly where you stand. And from here, we just send this over to our customer for approval. And then we can turn this into a job

or a project and start working backwards from there. So I'm gonna send this over to you. Angela you should get this in a few minutes here.

--- Quote templates ---

DANIEL

46:04 Any particular questions on anything we've seen so far on this?

ANGELA

46:10 No, that's really nice. How it does. I guess the, how does those templates that's something that we would create? Is that we with through onboarding? Is that correct? That's...

DANIEL

46:20 Correct. Yeah, they would be your templates, your verbiage. Like if you guys have any, now, you can import them. Like do you guys have like any word templates or excel?

ANGELA

46:31 No, I believe it or not. We actually hand write every quote that we do. Okay every proposal and they're very lengthy. You know, we don't have a PMS, you know, in our office.

--- Quote templates ends ---

ANGELA

46:43 So when we go out, we look at the work, you know, for instance, and we write up a quote or an estimate. You know, we're trying to also let the customer understand because they're not a GC or anything. They might not even have any Construction background at all. So trying to give them a real look of what we're doing line by line. We use it as a handbook for our technicians when they go out to do the work, it's pretty much a line by line item of exactly what we want them to do without them bothering us. So it's more work on the front end for us but it's we're not project managing every job, they're handling it in the field.

DANIEL

47:20 Yeah. And I think this is somewhere where again, you know, you may be able to adopt that technology to change some of those workflows or just change the information, the level of information you're given to the customer because the electrical side, it's very common, right? We, we hand write our quotes whether it's in the field or I just have my boss come back and call them or discuss it or bring it back to them. You know, this may have a little bit more impact and explanation of really what we're doing for this job.

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

ANGELA

Sure.

DANIEL

47:48 So again, you'd be able to build those out to your point. The goal is to get it to your customer in a quick manner, but in an informative manner. So again, you're able to see your company logo, the description of work, the cost however you display it. But then those pictures, right? If it's a panel upgrade, we're going to show that we're you know, 100 as under service and here's why. And then for your customer, it's easy for them to do like they did the invoice, they just hit approve, enter in their information here. Once they check their box and hit approve for a second time, that's a legally binding contract in all 50 states.

ANGELA

48:21 Yeah, that's nice. That's really nice. What about, if our technician goes out in the field and they use the audio clip, then do we just have to type that stuff in? You know what I mean? Like?

--- Deficiencies ---

DANIEL

48:35 Yeah, the, it's gonna use the you'd have to type that in. They can also use a talk to text... feature instead of doing the audio memo.

ANGELA

48:45 Okay.

DANIEL

48:45 Not to ruin a surprise. But if you watch, if you go to that webinar on the seventh, what's actually going to happen, is AI is gonna come in here and actually take all the information that was gathered by the field tech, but also standard information. Like when you're working on this type of equipment, like how should we be professionally speaking with our customer? There's going to be a button, where in the comment section, it's gonna supply a summary based on what AI wrote for you guys. So that way if the guy is doing a talk to text or an audio file, he's gonna misspell write bad things, say, bad things that's all going to be generated for you guys without doing anything.

--- Deficiencies ends ---

ANGELA

49:23 Yeah, that's pretty one.

DANIEL

49:26 Yeah, pretty cool stuff. And I put that webinar invite into the follow up e-mail here, but... that's where AI comes in and takes a lot of that redundancy and time efficiency back into your, you know, your portfolio. So you guys can maybe be more project managers than data entry guys, you know?

ANGELA

49:47 Yeah, yeah, absolutely. For sure. And then.

ANGELA

49:53 Is there like a quoting board that like you have access to see for like all your quotes or things like that as well? Okay?

DANIEL

50:01 Yeah, absolutely. So, you know, CRM functionality, you know, the sales side you can have as granular and non greatly reporting you'd like.

--- *Quote templates* ---

DANIEL

50:09 But for instance, under our quotes tab, you're going to have your jobs and quotes, any repair that was found or quote that needs to be sent out will be under your deficiencies. And then all those quote templates that I described, right? You're going to be able to build out a magnitude of different templates so that over time, you know, upfront leg work, but over time, you'll be able to pull from all your different types of templates.

--- *Quoting* ---

DANIEL

50:33 But, yeah, each salesman come in here and just say, hey, show me all the quotes that I sent out last week where the customer didn't even open them up yet. I'll give you a full report. Maybe we need to call in to make sure that we call these 134 customers to make sure we got the right information. So that's based on the auditor on the quote, we'll let you know when the quote was opened up by the customer, how many times it was opened up by the customer? You've got all those metrics reporting here?

ANGELA

50:59 Interesting. Okay.

DANIEL

51:01 Same thing with any new sales that come in, right?

--- *Deficiencies* ---

DANIEL

51:03 Hey, it's Monday morning. Did, did anything come in from my team out in the field that I need to quote out? I've got that report right for me so I can go ahead and hit that details page, generate that proposal.

ANGELA

51:16 And that would be from anyone out in the field. You're saying that be from?

--- Deficiencies ends ---

DANIEL

51:19 Anybody office admin field technicians, whoever is reporting, that repair or that sales survey that will be able to be searched down here. And if you're tying it to a salesman or a project manager, I can just search for all my stuff. Again, there's lots of reporting that you'll be able to benefit from here.

ANGELA

51:42 What about, are you guys doing anything with? Like... like I know you said that they can, the technician can like send a text or something to the people that they're going to next to the customer. Do you guys offer anything to like when they leave the customer to ask, like how is the visit or anything like that? Is there anything like that?

--- Type of work ---

DANIEL

52:08 With a third party that will do that for you? That's not part of service trade core. But if you're looking for reviews and things like that, I can, we can certainly set you up with that.

ANGELA

52:18 Okay.

DANIEL

52:19 Yeah. We're finding that more and more common. That was a big residential thing, but we're actually finding that to be pretty compelling in the commercial space as well with so much competition.

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

ANGELA

52:28 Yeah. So right now...

DANIEL

52:30 Now, that's not a service rate core functionality, but it is a third party company we work with. So that way when you go to... let me just pull up a job, let me see if I can show you what it would look like... reopen job, send, service link, request, service review, you see here?

--- Tech On-site ---

ANGELA

52:53 So that...

DANIEL

52:54 Is an option. I just don't have it turned out on my account, but it would be.

ANGELA

52:56 Through you.

DANIEL

52:57 Know another party that we would set that up. So that way you would have this feature. You can toggle this on to all your customers whenever a technician or yourselves, you know, clock out of that job, they would get, you know, asked to go ahead and write a review for you.

--- Tech On-site ends ---

ANGELA

53:11 Okay.

DANIEL

53:13 You guys do that now?

ANGELA

53:16 No, but I think one of the parts that we probably struggle in is follow up a lot of times we'll go out and do the work. Do, you know, do a good job, at least what we think, and then we just, we lose track of time and following up with customers is not probably one of our strong.

ANGELA

53:33 Correct.

DANIEL

53:34 Yeah. I mean, it's I understand. I think that can be improved though with the right technology for sure. I think that's maybe why you guys are looking as well, but if you have the right technology, you're not going to get all the time in the world back.

--- Pricing ---

DANIEL

53:47 But you'd probably get 30 to 40 percent of your time back throughout your day, which would kinda lead you to what you were just expressing those follow ups, that

should be that extra 30 percent that you spend those times on is the follow ups, right?

ANGELA

54:01 Sure.

DANIEL

54:04 Yeah. So what else, you know, what else would you guys like to see today?

--- Pricing ends ---

DANIEL

54:08 I know we're approaching the hour and I greatly appreciate your time today. You know, is there anything else that you guys are looking at? And if so, you know, how do we compare? And are there, is there anything missing again that I need to show you?

ANGELA

54:24 I know. I don't mark.

--- Accounting integrations ---

ANGELA

54:27 We were looking at you guys. We also, we're looking at BuildOps. I think you guys are both pretty much pretty comparable really for the most part. From what I can see like Angela spoke of earlier, the big thing with us is having that spectrum.

ANGELA

54:47 Integration. Yeah.

ANGELA

54:48 I mean, without that, like the owners of this company are going to be like, yeah, that's a hard now. So, I mean, like that is like a big thing is the integration of the spectrum because they're not, I can tell you, the owner of the company is also the controller. So her financial stuff is near and dear to her heart for sure. And she, you know, for her financial stuff, she likes using spectrum. So anything that we do moving forward has to integrate or it's just, you know, that that's a big thing. So.

ANGELA

55:21 That would be the biggest. One of the biggest things is because we started this process with spectrum offered service tech in the field and we started like trying to go down that road about six months ago, and it just wasn't up to any standard of what you guys have or what build up, you know, other people that we've seen.

--- Accounting integrations ends ---

ANGELA

55:46 So I just stopped it, wasting our money and our time and now we just kinda started, I don't know you guys called us, so I don't really know how that call came about. So, yeah.

DANIEL

55:59 Good job following up.

ANGELA

56:01 Yeah, I guess.

ANGELA

56:02 No, no, no.

ANGELA

56:04 And I think.

DANIEL

56:05 You hit the nail on the head, right?

--- *Accounting integrations* ---

DANIEL

56:06 Two things you are looking at the two providers. If, if I was gonna tell you to look at somebody else, it would be BuildOps this based on what I know and learn about your company. I think those are the only two options that I would really give you guys as far as the accounting plugins, typically, they fall short. So like we don't believe that there's an all in one software that's gonna do accounting service, project management, all that stuff. It just, it doesn't work, all will be small. So we're here to provide oversight of your day to day operations and then funnel that information back to your accounting software where you guys are maximizing productivity on both operations, but also accounting. I know that's very important. So.

--- *Pricing* ---

ANGELA

56:47 Yeah, for sure. I would agree with you on that statement with.

ANGELA

56:52 Contracts go, do they go yearly like three years, five years?

DANIEL

56:57 Yes, ma'am...

ANGELA

56:58 So, you know, we are.

DANIEL

56:59 It's a SaaS model. So we're year to contract. You know, we're open to negotiate terms and conditions. If people want to take advantage of that. Typically, when you're looking at a year to year, you know, a multi year contract, you're looking to discount that package over three years, right? That's the benefit of that. If you find the right technology partner and you don't want to do this again, sure, you know, you could take advantage of a three year deal specifically for a discount, and get that cost down for three years. So 100 percent, we offer both.

ANGELA

57:31 Why we're on that? How does, like what is the cost of it? I'm just curious.

DANIEL

57:35 Yeah. So we cost per service technician, all your office admin are free company, you know, depending on how many service techs you have, I can provide, you know, ballpark pricing.

ANGELA

57:46 So we would have 10?

ANGELA

57:53 10.

DANIEL

57:53 So, for service trade, you know, you'd be looking at anywhere from like 16 to 25,000 dollars. And then your first year, you can expect like a 20 percent onboarding fee on top of that. That's to get you guys onboarded. What happens during the onboarding process?

--- *Implementation and ongoing support* ---

DANIEL

58:11 It's very structured and this may help answer some of the questions... supporting services onboarding here's. That I'll make sure to send the AI webinar information over to you guys... but we're going to be having that information or that webinar on the seventh. But as far as onboarding is concerned, you know, we're gonna take all your data, right? So customer services items and pricing, customer list, PDF, we get that into your account for you. You also get trained and certified on the platform. Once we've confirmed all the data is accurate, we will then introduce the spectrum integration. It's imperative to get steps one through four done before we move onto step six. Once that's all been approved, then you guys are live and did it, you get ongoing support and you get an account manager moving forward. You can expect that to be a three month project. We onboard people. And the longest that

we will onboard and set our limitations is three months. There's no extension. We onboard people quickly, we onboard people efficiently. Three months is a long time. But the purposes is that if you're paying for something you should onboard in the first three months, not nine months, into the contract.

ANGELA

59:32 Okay.

DANIEL

59:34 And your...

ANGELA

59:35 Support is just like if things are going wrong or you can't figure something out like it's just there.

ANGELA

59:42 Exactly, right? So, you know...

DANIEL

59:43 All everybody's state side, but then also on top of that, right? Your account manager has quarterly account health calls, right? So you guys schedule a call to see how the software is going. They also do benchmarks cases. So like when I show you some of the analytics that's just not saying that we can provide 30 percent revenue out of thin air, they'll pull up, you know, top tier load to your customers and say, hey, we have identified a trend. Maybe you guys can focus on X, Y and Z to repair that side of the revenue. So it's a very, I say that because it's just, a, it's a relationship. It's not just a hand off. Your account manager is pretty involved with you guys throughout the entire life of the contract.

--- Type of work ---

ANGELA

1:00:22 Okay.

ANGELA

1:00:23 Gotcha. So ideally just so you know, most, we're completely talking about the service commercial department. But if we decided to go with a company, we would then run it in our department first and then we mirror our residential department to our service department just because they kind of run almost exactly the same except for residentially. So then we would eventually then add in probably, you know, a whole another department as in just that as well. So.

DANIEL

1:00:56 Yeah. And again, we're specifically built for the commercial side. We have our contractors also do residential. So over time, you know, you'll see you'll have your

residential, you know, it's the same workflow essentially your residential contractors, you're in and out of, but also in the electrical side, you're in and out anyways.

--- Type of work ends ---

DANIEL

1:01:14 But yeah, that's I think that's a great game plan. You can see the benefit of whatever option you guys go with and it should be, it's a smooth transition to get, the residential side on because it's just teaching them the mobile application and there shouldn't be anything more else to do.

--- Pricing ---

ANGELA

1:01:28 Yeah. Okay.

ANGELA

1:01:30 So, when you said, I know you said that it was kind of a large gap, you said 16 to 25,000?

ANGELA

1:01:37 Onboarding plus the integration?

ANGELA

1:01:40 Spectrum?

DANIEL

1:01:42 Yeah, that's correct. Yeah, the spectrum integration is, I believe it's 12,000 dollars annually.

ANGELA

1:01:49 So, we'd have to do that every year, a 12,000 dollar.

--- Pricing ends ---

DANIEL

1:01:52 Every year. Yup. That is, yeah, yep.

ANGELA

1:01:57 Okay. That's...

DANIEL

1:01:58 Not order by that's a third party company that we work with, right? I can send you that information, but again, they are responsible for the upkeep we work with them. But again, it's a specialty this special. No, it was something that took us like four years to get in the works.

ANGELA

1:02:16 Yeah.

DANIEL

1:02:17 Long, long time. So we try to do it on our own and, we finally hired a consultant that specializes with spectrum and does this every single day. And he's worked well with a lot of our customers that, you know, we have spectrum customers that use it as a stand alone.

--- Pricing ---

DANIEL

1:02:35 And then we've got the integration. So depending on cost and the value of that cost, it's available to you guys.

ANGELA

1:02:40 Okay. And then the 16 to 25, is that just based on what we just like, how many at the end of the day? Yeah.

DANIEL

1:02:48 Since, you know, I just wanna put pricing together. I'd rather just give you a high quote. The minimum would be 16. I think you'd be around, you know, 18 to 19,000 once I put everything on paper, but I'd rather just give a little bit of a higher number just so... you're not drawn back, if I did the opposite, does that make sense?

ANGELA

1:03:07 Yeah. So it's not like a per license thing per person thing or it is.

DANIEL

1:03:14 It is, so it's...

ANGELA

1:03:16 16.

DANIEL

1:03:17 It's it's 17 grand a year for the technicians per technician. So that time's 10 would be 17 grand.

ANGELA

1:03:29 Okay. 1,700, you mean a year per tech?

DANIEL

1:03:35 Correct per technician?

--- ST app contracts and pricing ---

DANIEL

1:03:39 Yeah, doing like range just to be, we would do like range pricing. So that way sometimes, you know, some of my earlier salesmen will hope the wrong price. So we're just trying to do a different pitch of pricing to make sure that if we're working with somebody, they're not getting some type of wrong pricing. So that's all. Yeah.

ANGELA

1:03:59 I would.

DANIEL

1:03:59 Over a quote. So you can see on a line exactly what this is gonna cost you guys. No, I'll just add in. You won't see the 12,000 dollar fee on my contract, but that will be an expected cost on top of your recurring contract with service trade.

--- Purchase decision ---

ANGELA

1:04:15 Okay. And then the next step...

DANIEL

1:04:18 Would be, you know, I'll send over what I call recap workspace that is going to have everything that we discussed today. It will also have today's recording. I will put on a flow map of a flow chart rather of the mapping integration with spectrum. I'll also have the pricing on the left hand side. There will also be some documentation just around how we help customers and everything you should really need to evaluate our platform. And then I would, you know, depending on a follow up for you guys, I'm sure you need to have internal conversation. But what would be a good time early next week to regroup with you and figure out next steps?

--- Purchase decision ends ---

ANGELA

1:04:55 I think, what do you think mark? I, the only, I think the next step would really be, is we need to understand what the spectrum integration, is even figure out if we'd be able to go?

ANGELA

1:05:06 If we, if you're going to send over that mapping, I think that would be one huge thing to be able to see. We have to make sure, that... you know, what is gonna sync and how it works. And, you know, make sure the right information is getting over. Like I said at the beginning of the call, like that's number one. So if you can send that over, let us take a look at that. And then I think this e-mail then we can set something up. You.

ANGELA

1:05:34 Yeah, because we currently, all our owners are out of the office today because we have a Christmas holiday party, so we wouldn't be able to actually speak with them until probably mid week, maybe towards the end of next week in general about it. So the more information we have that we can look at it and mark and I can be able.

--- Purchase decision ---

ANGELA

1:05:52 A meeting with them and kinda let them know here's. What we're looking at here's. What you know, you guys can offer for spectrum.

ANGELA

1:06:00 You wanna move forward with like getting a demo with the integration just to see what that would look like. And then, you know, if we have any further questions.

--- Purchase decision ends ---

DANIEL

1:06:09 Yes, ma'am. Okay. Yeah, I will get on that. I've got one more meeting this afternoon, but I will probably have all that in your guys' inbox Monday morning if not late this evening. Okay? And then, you know, if I don't hear from you guys, I'll touch base with you maybe Wednesday or Thursday of next week just to see if you know anything's come about and go from there.

ANGELA

1:06:27 Yeah, that sounds great.

DANIEL

1:06:29 Right. Well, thank you guys so much. I appreciate it and have a great rest of the day and weekend.

ANGELA

1:06:33 Yeah, thanks.

ANGELA

1:06:34 You too. Bye.

The End