



# ServiceTrade Demo with Commercial Air

Meda Piner with Commercial Air  
Recorded on 1/22/24 via Zoom, 52 min.

## Participants

### **SERVICE TRADE**

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### **COMMERCIAL AIR**

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# Transcript

*"This English transcript was generated using Gong's speech-to-text technology"*

MEDA

0:00 Hey, Christina, how you doing?

CHRISTINA

0:01 Good afternoon. How are you today?

MEDA

0:04 Good. Doing well. Thanks so much for joining me. My name's Meda. I'm a territory manager over here. So my whole goal will be to walk you through the tool. Do you have any hard stop time before we get going? I know I have about an hour until my next meeting.

*--- Purchase decision ---*

CHRISTINA

0:20 No, I could be pulled off at any moment. It depends on another call, but I will be with you as long as I can be.

MEDA

0:28 Cool. No problem. I won't keep you too long, but yeah, just let me know if you get a call or something. I know you are running a business over there, so we totally understand we'll start off with a little bit about you guys, then we'll jump into a background about us and then we'll walk through a workflow.

*--- Type of work ---*

MEDA

0:46 So, Jason, give me a lot of good notes about what you guys are looking for. So I just kinda want to start off on your customers and kind of that side first. So you get, is it 35 percent of work from service channel or korigo? A third party?

CHRISTINA

1:02 Yes. Yeah. Everything else is kind of phone based. Basically, we have a few of our key customers who are integrated with those channels and that's where that comes from.

MEDA

1:14 Okay. And then the rest of your work, what would you say? The percentage of like preventative maintenance versus like reactive work of the rest of that 35? Perfect.

CHRISTINA

1:25 Service calls is the vast majority. I mean, we do have a few plans out there. I mean, I'd call that like 10 percent. Everything else is gonna be, you know, reactionary of that nature.

MEDA

1:38 Okay. Got you. Any reason why you guys haven't gone to a more preventative maintenance model to make it more proactive, or is it just something that you guys haven't had maybe the bandwidth to do without software, things like that.

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

CHRISTINA

1:53 Time oriented, right? We don't have, you know, enough kind of field power at this point to do all the service work. And then, you know, really focus on that, but it's on the horizon. Okay? So, you know, tool needs to be capable of it. It's just not the vast majority of the business. I don't see it becoming the majority, but there could be more of it coming down the pipeline.

*--- Accounting integrations ---*

MEDA

2:16 Okay. And with 35 percent of your business being from cargo and service channel, I'm assuming you guys would do an integration. So the caveat for that is there's two options. You do an integration which is a, you know, comes with a price tag or you guys will have to enter in all of those work orders into the software manually.

*--- Purchase decision ---*

MEDA

2:46 Are you leaning one way towards the other? I guess depending on budget or kind of what's your all's idea about that?

CHRISTINA

2:53 I would probably say the manual process would be fine. It kind of fits for their workflow right now, you know, so long as we have that capability that's the important part.

*--- Purchase decision ends ---*

MEDA

3:04 Okay. Yeah. All right. And we can always down the line do an integration. Things like that. I will say that it'll cut costs a lot lower for you guys to, without the integration. So it's a, you know, keep a couple of dollars in your pocket... cool. And then a, who are your customers? Give me a little breakdown about that?

--- *Type of work* ---

CHRISTINA

3:25 So we're 100 percent commercially geared. So we're equipment, refrigeration and hvac, so basically anything that you would find in a restaurant, hospital system, kind of deal, we do retirement homes, but it's there's no residential work in that. So.

MEDA

3:43 Okay. Cool. Awesome. And then, O, what kind of customers are you guys getting from service channel?

--- *Paper process* ---

CHRISTINA

3:53 Usually like ownership groups, restaurant groups.

MEDA

3:55 Okay. Makes sense. Okay, cool. Cool. Awesome. So you guys are running on paper now, is that correct?

CHRISTINA

4:03 Yes, basically the only process that we have totally digitized or I guess at least partly digitized is, you know, our accounting. We run through Quickbooks online.

--- *Accounting integrations* ---

MEDA

4:12 Okay, perfect. And we do have an integration with those folks and it is a free integration. So you can set that up or you can keep it as a stand alone. It's kind of up to you guys. Cool. But I did think, yeah, that was a integration with Quickbooks kind of a need to have or I want to have at least.

--- *Paper process* ---

CHRISTINA

4:30 Yes, yeah.

MEDA

4:31 Okay. Cool. Awesome. So, I know the typical problems that kinda come with paper, but walk me through your workflow and kind of the bottlenecks that you guys

are seeing with that are the issues that are kind of arousingu.

CHRISTINA

4:45 Sure. So service call comes in either via e-mail from, you know, your service channel type situation or over the phone, we are, you know, writing down physically what, the problem is, where the location is, that kind of stuff that gets walked over to our, you know, owner dispatcher and he kind of keeps track of what we still have open.

*--- Access to information ---*

MEDA

5:11 Okay.

CHRISTINA

5:12 Once they are, you know, technician comes open for another job, he dispatches them. It gets written down on a pad. So kind of each technician has their own personal pad if you will, then, you know, we call the tech, tell them where everything is. They get to spec out.

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

CHRISTINA

5:34 They are either done with a job or there's parts or it's you know, continuation. So they'll fill out, their ticket... then, you know, they'll go onto their next job. If they're done. If parts are on order, anything like that, we write it down. We give them a po, and then we have another pad for basically open jobs.

*--- Paper process ---*

CHRISTINA

5:54 Okay? When jobs are complete, you know, they come in either to pick up parts and drop off their tickets or, you know, make a specific trip to drop off their tickets, that to be priced pricing our owner handles currently. And then he will kind of fill out on their tickets and then hand that over to our billers, and then they will enter it into Quickbooks.

*--- Paper process ends ---*

CHRISTINA

6:19 And then, you know, if the customer has any specific software that they interact with, we'll go ahead and put it in there as well. And that's you know, kind of the invoice stage?

MEDA

6:28 Okay. Got you. And I guess, are your techs coming back every day to drop off those pads or the work orders or whatever. Like what happens if a tech?

CHRISTINA

6:39 Okay. Not not all of them. It just kinda depends. We try to make it as, you know, easy as possible, or make it an efficient trip if you will. So if they're coming in for something else, we want them to drop off, but there are times where we have them specific, you know, hey, we got to build this out. It hasn't been turned in yet, you know. So that definitely does happen. So, there is additional, you know, windshield time that is being used for that. Okay? Not a huge issue but it absolutely happens.

MEDA

7:08 Yeah. Okay. Got you. Awesome. Cool. What else? So, what are you guys hoping to see today?

--- Assets ---

MEDA

7:17 I see like equipment as my God, I can't speak today, asset history kind of tracking the customer history as a whole. What else are you guys looking for?

CHRISTINA

7:30 That customer history like you're talking about, you know, the application, I would really like to, I'm assuming you guys have a mobile app for the field usage would like to take a look at that and just kind of the different capabilities of the system.

--- Type of work ---

CHRISTINA

7:46 I know that a lot of field management software has kind of like, you know, the general buckets, but just curious to see how yours looks and flows.

MEDA

7:55 Yeah, we can definitely do that. A, who else are you guys looking at in terms of software?

CHRISTINA

8:01 We have taken a look at ServiceFusion, a help desk BuildOps.

MEDA

8:06 Cool... one just now and I don't care who you guys go with. It could be us. It could be someone else. I mean, I do care, but... with you guys being 100 percent Commercial, I would definitely be aware of residential softwares in the industry.



CHRISTINA

8:25 Right.

MEDA

8:26 Leave it at that.

*--- Purchase decision ---*

MEDA

8:28 However, there were some good names on your list that you guys looked at. So we'll kind of compare what those look like. And then in terms of like a timeline of getting started, I know I'm not asking you to buy right now, but what would be all idea you like it all today? Your owner likes it? What's the idea for getting up and running?

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

CHRISTINA

8:47 We would like to be like ready to go March first?

MEDA

8:51 Okay. Like fully up and running March first.

CHRISTINA

8:57 As much as we can be.

MEDA

8:59 Okay. Yeah, I'll...

CHRISTINA

9:01 That sounds like, but.

MEDA

9:04 It's okay. I'll just say most folks, it takes around 60 days to get up and running. It could be less than that. It would be a maximum of 60 days. So... let's jump on in here. That gives me a good idea of kind of what you guys wanna see in your goals and such anything that we haven't touched on that's important for you guys?

CHRISTINA

9:27 I don't think so. I'll let you know if there's something that pops up as we go.

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

## MEDA

9:32 Cool. And yeah, we'll keep this super conversational. So if you have any questions, just interrupt me, jump on in here but I won't set my powerpoint you, I'll give you a quick power point about us, and then we'll run into the software and do a workflow. But we only work with Commercial mechanical contractors. We have about 1,400 and this is a little old active customers servicing about 10 percent of all Commercial and industrial buildings. And we accounted for about 13,000,000 assets under our management. So asset management and PM management are super huge on our end. But our whole goal over here is to control cost and grow quality revenue.

*--- Customer engagement ---*

## MEDA

10:11 We're gonna do this by improving your service and project operations and setting those texts up for success. So my assumption is these first two buckets are really what's going to hit home for you guys. And then in, we're gonna be able to sell more agreements and kind of grow that profitable customer loyalty.

*--- Customer engagement ends ---*

## MEDA

10:29 So what we're going to focus on today is office coordination, technician, productivity, customer communication and management, visibility. We do have a sales success piece. We're not gonna touch on that today. We're just gonna touch on, you know, service trade core. However just know that we have a full suite of products and applications that can be used whether that's for a sales tool or whatnot on top of ServiceTrade.

*--- Recurring maintenance ---*

## MEDA

10:54 So that if you do, if you guys do grow, we have software that can grow with you all. So just talking about core service trade today. In terms of office coordination, you'll have everything you need to manage and execute on that service agreement work. So automatically creating work orders when that works, due use preventative maintenance as a set it and forget it. We're going to set it once and then it's going to populate quarterly annually or however often you guys need to go do that service just so you don't miss it. And then of course, we'll summarize the profitability of each term. And like I said, we're really big on PM management.

*--- Recurring maintenance ends ---*

## MEDA

11:33 So you'll be able to hold and renew agreements when they expire. So really everything from dispatching to invoicing for your service work. Granted you're welcome to keep invoicing through Quickbooks if you would like. But we also have an invoicing module and do you guys do any kind of longterm projects like six months to a year?

--- Parts management (inventory) ---

MEDA

11:53 Okay. Cool. And then what about inventory? Do you guys have a warehouse? Do you order as you go? Maybe a mix of both?

CHRISTINA

12:03 Yeah, we have a mix of both, you know, small kind of parts room, but the truck stock piece of it would be something that we would like to get a better hold of from an inventory standpoint.

MEDA

12:13 Okay, cool. I'd say most folks especially around all size orders you go just because, you know, it's burning a hole in your pocket. If you just have a ton of inventory on hand, will definitely be able to track that from post warehouses to trucks, to job sites just to make sure we're using the right part on the right job.

--- Access to information ---

MEDA

12:35 And then of course, we'll be able to, you know, flock technicians in and out for accurate labor costs on the job, things like that. And then your techs in the field, I'm assuming your folks are on like iphones, androids, tablets of sorts.

CHRISTINA

12:50 They are currently using their kind of cell phones. So that would be, we would need to deploy, a tablet kind of situation with this roll out.

MEDA

12:58 And that's up to you guys. And when you say cell phones, no one's on like a flip phone, right? All of them have like an app store on their phone.

CHRISTINA

13:06 Yes.

MEDA

13:07 Okay, cool. I will show you what it looks like on an iPhone today, so you can see and kind of make that determination ourselves.

--- Assets ---

MEDA

13:16 But I would say most folks do use their phone or a tablet. So it's kinda up to you guys. But I'll show you what that looks like today. Okay? But as long as they've got like an app store, we're good to go.

CHRISTINA

13:27 Sure.

MEDA

13:28 So they'll have task list, location contacts, complete equipment and location history, they can record parts, labor and other cost information.

--- *Forms* ---

MEDA

13:37 They can take, you know, pictures, videos, any kind of equipment issue report. Now, do you guys have any paperwork, whether that's a specific type of job? Maybe you have a check off list for those kind of jobs or maybe a customer requires a certain form to be filled out?

--- *Forms ends* ---

CHRISTINA

13:55 From time to time, yeah, it's not every job that does exist for sure.

MEDA

13:58 Okay, cool. So like I said, we can tie them to the type of job. So every, I don't know, preventative maintenance back that you guys do... will come with a specific form that they have to check off. Or if you have like a specific customer, we can tie it to every time we go to that location, that form will pull up to fill. So we have a couple of rules kind of around that, and then you kind of touched on it earlier. I'm assuming you guys want to keep the managerial oversight of the quotes and invoices fielding through the office, you all don't want the text to, you know, willy nilly be able to do that or?

CHRISTINA

14:35 Yes. Yeah.

MEDA

14:35 Okay, cool. So we'll set up everyone with their own set of individual preferences of what they can and can't do. So you guys can customize that to a really granular level if needed.

CHRISTINA

14:46 Okay.

MEDA

14:48 And then customer communication, you'll be able to share Rich realtime updates from the start to finish of each job notifications.

--- Customer engagement ---

MEDA

14:55 When your texts are in route, appointment, reminders, after job reports, with those pictures, videos, you know, any kind of detailed summary. And then of course, paying invoices and approving quotes online. And then lastly management visibility. So if you guys do have any, you know, customer issues or maybe you have a problem child, you know, we all do, we'll be able to uncover those process issues pretty quickly.

--- Access to information ---

MEDA

15:23 We'll have, you know, a detailed audit log in there if you need to pull. So you'll just have centralized visibility and then of course, you're gonna get margin performance, technician productivity, you know, those KPIs... cool. So let's jump on in here. I'll show you three different views today, the office view the technician view, and then what your customers will see as well. So we'll start off here in the office view and you can see my screen? Okay?

--- Access to information ends ---

CHRISTINA

15:52 Yes.

MEDA

15:54 Cool. Okay. So yeah, we'll start off in the office. This is your homepage dashboard. You have your daily schedule here of when and where your techs are gonna be. Of course, you have a scheduling and dispatch board. I'll touch on that and then we have overdue jobs without appointments and jobs without appointments due in the next two weeks. So this is really good to see what's upcoming. Like I said, preventative maintenance, set it and forget it. So it's going to populate here two weeks in advance. So you guys know what's upcoming. So you go ahead and schedule that and we don't miss those jobs as well as if you guys are just super busy and you can't get out that week, go ahead and create the work order and let it sit in here and on your scheduling board until you guys are ready to do that. And then we have job set mark complete and jobs that needs to be invoiced. So it's just the different stages of your workflow at a snapshot, just to kind of get a pulse check. Then we have our clock events here, or technicians clocking out with pins on their locations. We're not tracking their bodies or their trucks for tracking when they clock in and out for, you know, drive time, break time, on site time, things like that. We'll touch on scheduling and dispatching real quick. Now, we have a scheduling board that's based off geographical location and you can filter down the boards in the list and it's kind of what you see, different colors mean different things. We'll we'll kind of train you guys on that and you can of course, customize colors and stuff like that. But this is really good for planning out routes. So this is really good for any kind of proactive work and to kind of fill in the gaps with maybe your reactive jobs. And then we also have a dispatch board which is kind of your typical board. We have a day week and a monthly view. Let's see there's some jobs on there. Okay? And then we have our queue up here. Most folks use this for like maybe they schedule their preventative

maintenance jobs and put these emergency service jobs and kind of schedule them drag and it's a drag and drop down when they can fit them in. But you guys can really use the queue as you wish. It's just kind of a holding portion to put that as you're adjusting schedules.

CHRISTINA

18:21 Sure.

MEDA

18:22 And then we have an unassigned button if you're not ready to schedule it, but yet you've got your texts and their swim lanes, and then we have available jobs over here where you can kind of filter down this list and see all the jobs. Do you know? Let's say this month, apply those, and then it's a simple drag and drop onto the calendar when it's ready to go. But you'll also be able to click into these work orders and see kind of the details of those as well.

CHRISTINA

18:52 Okay.

MEDA

18:54 Cool. Any questions on scheduling or dispatching?

--- *Recurring maintenance* ---

CHRISTINA

18:58 No, that makes sense.

MEDA

19:00 Okay. Cool. All right. So let's jump into a work order that I set up and you'll have a lot of customers that have maybe multiple locations underneath.

CHRISTINA

19:11 Yes.

MEDA

19:12 Okay, cool. So I'll show you how we split that up. You can see my trader Joe's corporate headquarters is up top here.

--- *Assets* ---

MEDA

19:19 And then I have each individual location linked below. So each location will have its own asset history et cetera. And then you can put like a preferred tech for the location, maybe a comment or any kind of attachments, things like that on the headquarters level.

CHRISTINA

19:39 Cool.

MEDA

19:40 But clicking into our college road location, like I said, you'll see a full breakdown of this location and what kind of has been done so far there. So we've got our active service. Ignore this alarm. I gotta do that one later. But this is our job that we're gonna be doing today. We have any previous jobs at this location as well. With a search bar... we have any assets at this location. So your technician will have this in the field as well. We'll have a full breakdown in history of each individual asset. And if you guys don't have those categorized yet to this level, no worries. We will grab those or your techs will grab those in the field. We have an OCR scanner within our app, so they can essentially take a photo of the asset sticker and it'll input these details. And then they could, you know, fill in the rest like, you know, location, something that wouldn't be on the sticker?

CHRISTINA

20:45 Great.

MEDA

20:46 Yeah, within this, like I said, your tech will have this. We have our active service up here. Any previous jobs for this one asset. Now, the biggest difference for your technician is they won't see invoice details over here. That's strictly gonna be an office functionality. They're just gonna see the work.

--- Deficiencies ---

CHRISTINA

21:05 Okay.

MEDA

21:06 Cool. So we have jobs and then we split up deficiencies as well. We actually started as a fire company. So we do cater to that market as well, but that's why we use the term deficiencies, just think repairs, but it's really good for making that repair and replace conversation because you can search for, you know, maybe my text gone out and done a compressor fix, you know, hopefully not as many times as I have this year, but it makes that repair and replace conversation a lot easier when we can kind of track those repairs and what's being done.

--- Assets ---

MEDA

21:46 Sorry?

CHRISTINA

21:47 All good.

21:48 And then we have any previous quotes on this asset, any sub assets, any kind of attachments, any kind of comments? Okay. You'll get full history there.

MEDA

22:05 I'm just getting blown up by Jordan. I wonder what's going on... cool. So we'll jump into our work order... here.

--- *Quote templates* ---

MEDA

22:23 So I created like a general preventative maintenance for this H vac unit. There's a lot of spots where you guys can use templates. We definitely recommend using templates on the scheduling level. So every time that I'm going out to do a preventative maintenance job, I can add this description and these parts and labour items. So because generally, when you're doing preventative maintenance on an H back unit quarterly especially it's just gonna be the same thing over and over again. It just might be the repair or something else that's different. So definitely would suggest using these templates to apply a description in parts and items on jobs that you guys are doing pretty routinely. But all of this can of course be adjusted in there. We have it linked to the asset that we're working on. Like I said, the parts and labors pulling over based off the rules that we set. And if it's something that we're just, you know, a simple part like a widget that we're pulling off our truck, we're gonna have those pricing rules in there because that's something that you guys probably have on hand.

--- *Parts management (inventory)* ---

MEDA

23:29 So we'll grab a list of that from you guys. And then if you're ordering a part, let's say filter 12 by 24. That's not something I have in my inventory but I can come in here and add that. I'm gonna use this part on this job, select a service line.

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

MEDA

23:47 I'm just gonna pick sprinkler for the sake of time and then put in the price for that filter. So let's say that filter is 20 dollars and then select a source. So we're gonna put in your parts vendor information and you can tag these parts to a technician. Most folks use that as like a tech truck. A warehouse could be like your inhouse parts room, something like that or, you know, it could be a warehouse itself. And then we have your parts vendors. So we'll put in your parts vendor information. Let's say we ordered this from acme here's our po number and you know, we could say we've received this or ordered it not ordered. Yet. Let's say we've ordered this. It's gonna be in on Monday. So when that part does come in, I can come up here to my search bar, type in that po number and it's going to pull up this work order for me. So I know what part needs to go on? What job... is that kind of makes sense in terms of parts, and stuff like that?



--- Assets ---

CHRISTINA

24:54 Yeah, it's a good way to keep track of it?

MEDA

24:57 Cool. And then if you guys, like I said, had any kind of attachments or something, okay, let's say that if you had any kind of attachments, that would be under blank paperwork would be held here and your tech could access that in the field.

--- Tech On-site ---

MEDA

25:12 If you had, you know, any kind of vendor bills, anything like that that's needed and attachments can be held here.

CHRISTINA

25:18 Okay.

MEDA

25:19 Cool. We'll kinda go through the rest of these when we come back and the tech fills it out. But any questions so far? We're gonna come back and do a quote in an invoice, but anything on the front end that you have any questions on or this work order, anything like that?

--- Access to information ---

CHRISTINA

25:36 No, looks good.

MEDA

25:39 Cool. We will keep it moving. So, like I said, I'm on my iPhone today. So you'll kind of get a view of what that looks like. The tablet is just, I mean, it's the same format. It just depends, you know, how big your fingers are, and if you prefer to look at something a little bit larger than your phone... that's not the right one nine two.

MEDA

26:14 So like I said, I'm on my phone today, but your tech will log into their app, see what needs to be performed. I only have one job on my list today which is why we only see one. But typically you would see a week or I mean the whole day. And if you want to give your tech access to seeing the week and the subsequent weeks, you can definitely do that as well. Like I said, it's pretty granular on what folks can and can't do within the software especially on the tech side. So we'll click into my work order.

--- Tech On-site ---

MEDA

26:47 I can go ahead and clock in saying them on site. You guys want to track drive time, you can clock in and route. You can also notify the customer of your eta right through here. Then... we also have job prep function mostly for like miscellaneous work. I would say most folks use that for like taking parts, have a warehouse, something like that, but cool. So we clocked in on site. Now as a tech, all I've got to do is go into my services and see what needs to be performed. This is a wrong job that I clicked into, but we're gonna pretend this one's a fire alarm system, but it's fine. See what general description needs to be done.

--- Assets ---

MEDA

27:30 There's comments there. Your tech could leave a comment. Most folks use this as like a gate code building map situation. You have any deficiencies. So any repairs that we've done on site contacts as well, paperwork. Like I said, if you guys have any kind of like check off list, anything like, that would be shown there.

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

MEDA

27:51 And if your tech needed to add any kind of attachments they could. So if they needed to like scan a paper and then fill it out. Or like if they went to home depot, need to take a photo of a receipt, things like that, they could easily do that.

--- Tech On-site ---

MEDA

28:07 And then we have our job items here. Let me just go. Okay. There it goes. I'm going to clock into that other job. So it doesn't look as silly. Let me just clock out of this real quick. Here we go. Sorry, I wanted this to make this a little bit more relevant for you that we're not talking fire the whole time. So let me just clock out of this job real quick.

MEDA

28:48 Okay. Let's move back, to a job that would be a little bit more relevant for you. Okay? So we have our preventative maintenance job there. We go. All right. So let's clock into this job. It's the same thing. We have our services and we can hide that estimated price there too if we need to from our technicians.

--- Assets ---

MEDA

29:11 But like I said, we've got comments we've got on site contacts. If there is paperwork, it would fill in the customer details, location, details, asset details, all of

that they would just have to do is required on the form, any kind of at. And then we have our job items.

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

MEDA

29:27 So we can see, we added that widget in the office, but that's just something that we pulled out of our inventory. But that filter is something that we ordered. So that's in gray just so the texts know that's not something that they can use on the job today.

*--- Parts management (inventory) ---*

MEDA

29:41 Okay? And then if your tech was pulling something out of their truck, we go to add part or item. This is a list of inventory that we grab from you guys. And then if they needed to add additional items, they could, and they can do the same thing that you guys did in the office, you know, notate the source if it's a parts vendor, things like that.

*--- Assets ---*

MEDA

30:06 I said they'll have full asset details there as well. So if I click into this H vac unit, I'm gonna see any kind of service history, any deficiencies, comments, attachments, you know, tags, you can make custom tags, you know, a lot of our texts like to make tags like. I don't know this asset is really old and finicky or whatever the tag is like rested. I don't know but making a tag to kind of give them context on a couple of things. And then of course, these details down here are things that we can grasp with our phone camera as well.

*--- Deficiencies ---*

MEDA

30:42 Cool. And then they could just while we're in the field getting this up and running, add an asset. So whether we were able to do the repair right then and there, or we need to go back out whether that's a repair on the asset that we're working on or maybe the onsite person tapped us else or, you know, maybe we just saw a potential repair that we want to document and quote out.

*--- Quote templates ---*

MEDA

31:08 We do it all the same way. So we'd come up here to deficiencies, I'm gonna see all the previous repairs and then we can come down here to add. So I don't have to have a ton of description. Let's just say it's that Dang broken compressor. Again. It's my favourite as you can tell because, I don't have to have a ton of description.

*--- Deficiencies ---*

MEDA

31:31 They could use voice detects too if they wanted. But I'm gonna add attachments. So like videos, voice memos, photos, as many as you want. That's definitely, a broken compressor, not my capping and take in a plant that needs to be watered, but you can have a description on these photos and all that stuff as well. So if you want to do like a before and then take another one and do an add. We were able to fix it. Things like that. Okay. Cool. So we added those. We're not limited. So we can add as many as we want. We're gonna mark the severity. So whether it's an operable deficient or just a suggested repair, let's say it's inoperable today. We're gonna tie it back to that asset cause you're gonna clean clear asset history. So we're working on this H vac unit and then we're going to assign a status. So if we were able to fix it right then and there, we'd say fixed in our office would be prompted to go ahead and invoice. Okay? If it's a new. Repair, maybe we've got a part on order. We need to quote it out. You know, whatever the solution is, we couldn't do it right then and there we'd say new. So let's do new. So the office will be prompted to quote. And then your solution could be like order part xyz or quote out.

--- Access to information ---

MEDA

32:53 MM, HMM. Hopefully they give you a better description than me. Cool. And then we'd save that. And I don't know if you can see this well, it just drops. But there was a load button. So all of this can be done offline. We understand texts might be not within cell phone range.

--- Deficiencies ---

MEDA

33:12 So everything that they, that I just did, you can do with no internet access. It just takes a second to kick to the office. If you don't have any internet access, it'll just take until you get back on, however, it's not something that you have to trigger. So the office already notified that I logged a deficiency and they can actually go ahead and quote that out.

--- Tech On-site ---

MEDA

33:35 Now, would you guys ever do a workflow or do you do it now where we need to gather a signature in the field? Yes, cool. Do you guys do that before or after the work's gone off?

CHRISTINA

33:48 After a...

MEDA

33:50 Cool. So we're gonna create a work acknowledgment. Obviously, if you guys weren't invoicing in the field, we would take off that button. So let's create work acknowledgment, and we don't want our tech to do a ton of admin work in the field

because honestly, that leads to a lot of problems. So all they've got to do is select the contact you guys could have that automatically apply to. I know a lot of folks like especially with like property management companies, there might be an onsite contact and owner, things like that.

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

MEDA

34:22 So you can give them titles to. But that's all they had to select the services is pulling in the job items is pulling in their files and photos, their deficiencies and their comments are all pulling in for them.

CHRISTINA

34:35 Okay.

MEDA

34:36 So, at this point and again, this, when, you know, generate invoice, when it be there, it would just be continue. And then at this point, your tech would hand their phone or tablet to the customer and say, hey, review the service, review the parts and labour items. And this is never gonna be pricing. It's. Only gonna be quantities because this is just approving that the work was done. So they're gonna get a heads up about the deficiency as well. So, it's kind of a heads up of, hey, we're gonna quote you out. Something, be on the lookout for that. But at this point, they could just go ahead and confirm and sign the work.

CHRISTINA

35:13 Okay.

MEDA

35:15 I've signed off as a customer.

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

MEDA

35:19 And now that's already attached in my attachments, the customer is getting a copy and obviously the office is notified... and I'll show you what that looks like. When we get back to the customer side of things. Any questions here on the mobile app? No?

CHRISTINA

35:40 Okay. Sounds cool.

MEDA

35:42 So we'll go ahead and clock out of this job because I'm done for the day.

--- Paper process ---

MEDA

35:46 My office needs to quote that out. Now, while we have made our software incredibly easy for technicians to fill it out and do the work order. Our biggest complaint was that they still weren't coming back with the right things all the time. So you can give digital hand cuffs to your technicians.

--- Tech On-site ---

MEDA

36:05 This list can be kind of whatever you want it to be. My office required me to attach a photo, leave a comment and recorded deficiency. These have been checked off because I've done those, but I haven't left a comment. So I can't physically clock out until I do what the office requires me if doing.

CHRISTINA

36:22 Okay.

MEDA

36:23 So until I've hit, you know, whatever my comment is, I'm just gonna say completed now, I can clock out. Cool. So back on the office side, whoever is on all right, let me reload my e-mail whoever is doing your quoting, these emails will be sent to them and it's gonna show you I've got a work acknowledgment as well, but we'll show you that they're gonna get a deficiency e-mail it's gonna show you I founded this location by who, during what job here's our solution, but the meat and potatoes is gonna be this link right here.

--- Deficiencies ---

MEDA

37:03 It's going to bring you back into the office side of things... and what this is. It's just a record within a record. So we're still tied to the original work order. It's just a deficiency within that. So before we go ahead and quote out repair, what we're gonna do is give you any related repairs. So anything that's been done on this unit that's kind of surrounding the compressor, any repairs that we've ever had on that one unit, it's gonna pull up for you guys. And then any kind of comments, you know, if you're quoted in the field, of course, that would be there.

--- Quote templates ---

MEDA

37:43 And then any kind of attachment. So your photos, any kind of paperwork, things like that. Cool. So we'll go ahead and build out your quote. Now we'll kind of talk contracts. In a second. There's a lot of rules that you can apply to contracts. So whether you just have one standard contract across the board, one for each customer, however you guys want to determine that... but let's create that quote. Do

you guys use templates when you're quoting in terms of like a description and maybe line items or how do you quote?

CHRISTINA

38:20 Yes, I mean they're pretty open ended. So we go and kind of the same thing and customize it each time.

MEDA

38:27 Okay, cool. So it's gonna be kind of the same workflow... same thing I was talking about when you're scheduling jobs using templates, I also recommend them for repairs. I mean, you don't have to, but it will make it really easy. So every time I do a compressor replacement, which is a pretty standard repair, it'll apply this quote description in these line items.

CHRISTINA

38:49 Okay.

MEDA

38:51 So you can always come in here and adjust any of these. Hopefully, you're not writing that... and then you can come and adjust any kind of line items. So... I want to adjust any of those and what's coming in some play here, not with, the top one in the last one, but these middle two lines right here.

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

MEDA

39:15 How these are marked up is based off my contract. So this contract has certain markup rules to it which applied here to these line items.

CHRISTINA

39:24 Okay.

MEDA

39:25 So that's something that you guys can set. And then of course, you can always adjust the pricing and things on the back end, but it just gives you a good framework one to make sure we're charging the right price for our parts because, those do change a lot.

*--- Quote templates ---*

MEDA

39:40 And then you can adjust your level of detail for customers. So if you want, you know, a grand total only summarized by line item, however you want this to look, we've got a lot of different options here. You just click it and it'll apply that formatting.

CHRISTINA

39:54 Okay.

MEDA

39:56 Cool.

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

MEDA

39:56 You've got your attachments down here and any kind of comments as well. And then we'll go send this to our customer... toggle off any kind of like voice memos. Any comments, anything that we don't want our customers to see, pick our own site contact or whoever we're sending this quote to. I promise you won't have a 1,000,000 of me in there. And then we'll pre you this full screen. So if we were really sending this to a customer and have a big approved button and a big request changes button over here, it'd be your logo up here, of course, and then anything from description of work down can really be customized. So the level of detail up here, how you want to line out your line items, the files and photos and comments that you guys attach as well as the terms and conditions are all going to kind of be customized.

CHRISTINA

40:53 Okay.

MEDA

40:56 And then I'm just going to manually approve this quote.

*--- Quoting ---*

MEDA

41:01 You will get a history in here, time date and stamps of who approved it, all that Jazz. And then from here, you're gonna be prompted to do two different things. Now, it might change depending on your workflow or the customer. But you've got both options. You can either create a whole new job from this quote.

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

MEDA

41:22 So... invoicing after every visit essentially or we can add this to the existing job because we've got to go back out to do this repair. Anyways. We might as well invoice all at one time. So just kind of depends on what all's workflow is and what you prefer to do. But by adding this to my existing preventative maintenance job that we did earlier, what it's gonna show is that we're back to, our original work order. We're still tied to our original work order, still same number. But I scroll down and I can see that this preventative maintenance has been completed.

*--- Dispatch ---*



MEDA

42:02 And now that we've got a repair to do... so, you'll go on your scheduling and dispatch board and schedule out the second appointment. But at this point, my work order has been updated to include both jobs. So we've got our repair up top. And then our line items for our preventative maintenance, we scroll down and we can see our clock events for our technicians.

--- Tech On-site ---

MEDA

42:30 We're gonna see our asset details, the deficiency record... any kind of comments and any kind of attachment which would be, you know, that work acknowledgment that we got signed, any paperwork, any vendor bills, things like that?

CHRISTINA

42:48 Okay.

MEDA

42:51 And then we, I let's say we magically completed this job and let's go ahead and create the invoice.

--- Quote templates ---

MEDA

43:01 I never suggest adjusting it on this screen. Just go to the next screen and what it's gonna show you is a, real, pretty gross margin and then a full list of line items. So again, just like the quote, you can come in here and adjust any kinds of pricing... and then you can adjust the level of detail again, of course.

--- Invoicing ---

MEDA

43:23 So if you want to summarize by line item type, have grand totals, you know, however we want to Lin this out.

CHRISTINA

43:30 Okay.

MEDA

43:32 And do most of your folks pay with credit card or ach, or do you have any check or cash payments?

CHRISTINA

43:39 Mostly check, there is some credit cards.

MEDA

43:42 Okay. Yeah, got you. So if you do have a check, you can notate that with the reference number here. Like I said, the ServiceTrade and Quickbooks have an integration together. So whatever you notate in here, say that it's been paid with check and you put in that reference number, it's gonna notate that this is paid. And then it's going to send your Quickbooks that it's paid. So whether it's been, you know, partially paid, fully paid, not paid. Maybe they've opened up the contract but not paid. All those different variables. It's all gonna show back in your Quickbooks as well as in ServiceTrade.

CHRISTINA

44:22 Okay.

MEDA

44:25 And then we'll go ahead and send our invoice. So you can set up the Quickbooks integration to be a 24 hour sync. So just syncs automatically or you can set it to where you could push it over manually which is really just a two button click. So it's not like you're you know, manually adding in all those details or anything like that, but it's just up to you guys, how you all want that to send.

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

MEDA

44:51 And then here's your invoice, same thing as your quote. It's gonna be your logo up here. And then anything from code and item down can kinda be customized depending on how you want to set this up. They could go ahead and pay now. And then we've also gotten got these service details here.

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

MEDA

45:11 So our service details can be sent as a standalone before the job's gone off during it as a Progress check. If you guys did end up doing some, you know, more project work or after the job has been done, you know, on the invoice. So what this shows is my completed appointments, who my texts were when they came.

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

MEDA

45:32 And this can completely be customized as well in terms of level of detail, the services that needs to be that were performed, the parts and items, it's always gonna be units. And then our attachments, which is our work acknowledgment. I'll show you how that looks in a second. And then our deficiency record which has been fixed now.

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

CHRISTINA

45:53 Okay.

MEDA

45:54 So I'll show you our work acknowledgment, and this is what that looks like. Like, you remember detect and build this out. It just the software kind of does it for them... but you've got those photos, comments, warranties and that signature at the bottom as well.

CHRISTINA

46:13 Okay.

MEDA

46:15 So, that is kind of ServiceTrade at a high level.

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

MEDA

46:20 I believe we touched on. Let's see inventory, equipment, history, customer history... anything else that we didn't touch on today? That's important?

CHRISTINA

46:32 I don't think so. You know, it was in depth but so high level. So, I appreciate your, you're running me through it.

MEDA

46:39 Yeah, no problem. I know we kinda covered a lot today. Do you wanna talk about pricing real quick?

*--- Pricing ---*

CHRISTINA

46:46 Yeah, that'd be great.

MEDA

46:48 Cool. Let's see, and you had, how many technicians do you guys have?

CHRISTINA

46:54 Fixed currently?

MEDA

46:55 Okay. So I would suggest you guys to start out on the base package especially coming off paper. I never suggest anyone to go up to any of our higher tier packages

like one. You might not be sure what you would need. So I'd rather you guys start off on a lower package and have to add then, you know, have to go down things like that... but we do have a base premium in an enterprise package. I will go ahead and say that if you guys want an integration with... what's it called. So sorry, core service. Thank you. What? I, okay. Hey, if you guys want an integration with that, you will have to be on our premium like our mid tier package. But if we're not going to discuss that, then, we should be all good for now. But in terms of pricing, I'll share my screen. So it is 89 a month per technician. But we do ask for the year upfront. So we do have a year long binding contract for six technicians. For your first year. We're at 8,508. And that includes 2000 and some change onboarding fee that's a one time fee. We're gonna get you guys up and running, train your ex, train your staff. Like I said, it generally takes around 60 days to fully get up and running. More than likely your text will be up, you know, around the 30 day marker sooner.

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

MEDA

48:30 It just kinda depends on one if we have to clean up data to like not that I think you guys would. But if you start cancelling meetings on us and like not doing, the implementation and onboarding things, you know, that's not something that we can kind of control.

*--- Pricing ---*

MEDA

48:45 So generally 60 days I've seen folks get up and running in 30. So it just kinda depends max 60. Okay. So that is your first year. So we only, do we do pricing based off technician count. So office staff is offering, you could have 100. You can have one. Doesn't matter. But if you guys do choose to renew with us at six technicians where it's 6,408 for the subsequent years. Now, the only reason that number would change is if like you guys went up in technician count or you went up and package or something like that?

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

CHRISTINA

49:23 Okay. That's cool. It's good to know.

MEDA

49:27 What do, what is kind of the pricing? Where does that sit at versus yours budget that you've set?

CHRISTINA

49:33 So, we are taking a look at, a ton of different options. So that's part of this just kind of seeing kind of where the capability is versus the pricing.

*--- Purchase decision ---*

CHRISTINA

49:44 So, I mean, I would say this is pretty on par. Doesn't feel far reaching by any means. So... but yeah, pricing always a consideration, right?

MEDA

49:55 Absolutely. Of course, now, in terms of what this process like the decision process looks like, I know you're looking at other softwares, is this something that we'll probably have to bring in more folks to evaluate or, what does that kinda look like? Are you just kind of comparing now and then having in general?

--- Purchase decision ends ---

CHRISTINA

50:15 Yeah. So we're going to compile, and, you know, give me the information and then we'll reach back out from there. So probably, you know, we can have two weeks. We'll have a better idea of where we want to land.

MEDA

50:26 Cool. That sounds good. Okay. Let's see. My calendar looks crazy.

--- Purchase decision ---

MEDA

50:34 Why don't I touch base with you guys next week just to see if you want to schedule a second meeting if we need to sit down and answer questions or kind of, I know it's kind of a lot to look through a bunch of different softwares. So if you just want to have like a compare session where we just sit down and we compare all the different softwares or you know whatnot?

--- Purchase decision ends ---

MEDA

50:57 If you find that there's a feature in another software that we didn't talk about today, just let me know. I'm sure we have it. Okay. So why don't I just touch base with you? Does the first or the second sound better just for like five, 10 minutes to see what our plan is?

CHRISTINA

51:15 The first should be fine.

MEDA

51:16 Okay. Let's touch base then. Does this time still work with you again or you wanna do mornings afternoons? Yes?

CHRISTINA

51:23 No, this works.

MEDA

51:24 Okay. E, I'll just put a calendar invite for like 10 minutes so we can discuss and then I'll touch base with you before that, I won't.

*--- Purchase decision ---*

MEDA

51:35 So if we need to move it or, you know, do a whole second demo with the team, whatever that is. We'll we'll chat about it.

CHRISTINA

51:41 Okay. Sounds like a plan.

MEDA

51:43 Anything that you need from me? I'll send you a recap and proposal, anything I could send you in terms of materials or anything that's important to your, you know, decision team?

*--- Purchase decision ends ---*

CHRISTINA

51:54 No, just, the pricing structure that you provided. Yeah. And, I think that's it.

MEDA

52:00 Okay, cool. So, I'll send this to you if you need anything else, just let me know in the meantime, otherwise we will chat the first.

CHRISTINA

52:08 Sounds like a plan. Thank you so much for your time. Yeah.

MEDA

52:10 Yeah, thanks, Christine. You have a good one.

CHRISTINA

52:12 You too. Bye bye.

*The End*