



# ServiceTrade Meeting with Ars Mechanical Llc

Joseph Summerell with Ars Mechanical Llc  
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## Participants

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# Topics

<i>Access to information</i> .....	5:30
<i>Assets</i> .....	6:29
<i>Forms</i> .....	6:51
<i>Quote templates</i> .....	8:19
<i>Accounting</i> .....	8:40
<i>Quote templates</i> .....	9:05
<i>Assets</i> .....	9:22
<i>Recurring maintenance</i> .....	10:00
<i>Access to information</i> .....	11:17
<i>Deficiencies</i> .....	12:03
<i>Implementation and ongoing support</i> .....	12:51
<i>Implementation and ongoing support</i> .....	14:24
<i>Purchase decision</i> .....	15:14
<i>Quote templates</i> .....	16:22
<i>Assets</i> .....	16:40
<i>ST app contracts and pricing</i> .....	17:55
<i>Assets</i> .....	18:37
<i>Forms</i> .....	19:13
<i>Recurring maintenance</i> .....	19:37
<i>ST app contracts and pricing</i> .....	20:18
<i>Recurring maintenance</i> .....	20:43
<i>Assets</i> .....	21:09
<i>Pricing</i> .....	21:55
<i>Recurring maintenance</i> .....	22:21
<i>Assets</i> .....	24:10
<i>Recurring maintenance</i> .....	26:25
<i>Recurring maintenance</i> .....	27:35
<i>Recurring maintenance</i> .....	30:38
<i>Pricing</i> .....	33:37
<i>Tech time tracking</i> .....	34:38
<i>Tech time tracking</i> .....	36:33
<i>Pricing</i> .....	37:49
<i>Tech time tracking</i> .....	38:45
<i>Access to information</i> .....	39:07
<i>Access to information</i> .....	39:51
<i>Pricing</i> .....	40:32
<i>Tech time tracking</i> .....	42:03
<i>Pricing</i> .....	42:27
<i>Implementation and ongoing support</i> .....	43:11

<i>Pricing</i> .....	43:28
<i>Purchase decision</i> .....	45:24
<i>Implementation and ongoing support</i> .....	45:47
<i>Purchase decision</i> .....	46:54
<i>Dispatch</i> .....	48:43
<i>ST app contracts and pricing</i> .....	49:16

# Transcript

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

AL

0:00 Okay. How you doing a step to?

JOSEPH SUMMERELL

0:01 So, no worries. How are you this morning? All?

AL

0:06 I'm good.

JOSEPH SUMMERELL

0:07 To hear... love it when somebody's a couple of minutes early in the same, always try and be five minutes early to everything.

AL

0:16 Well, I tried to go ahead and get it going before I stepped away.

JOSEPH SUMMERELL

0:21 So, that's what I was doing nice.

AL

0:27 So, I'm seeing deal don't come up in a probate let this morning.

JOSEPH SUMMERELL

0:32 Boy. Well, she always come join you in your office. I guess I don't know how many chairs you got in there?

AL

0:40 No, I think you, this might be working remotely.

JOSEPH SUMMERELL

0:44 Okay. Well, I ran into Brad bogs with, we were at a conference together and told him you all were looking at us and he was like, yeah, I know them. They're great people. So.

AL

0:57 Like I said, it's a smaller world that we have here.

JOSEPH SUMMERELL

1:01 Yeah, especially when you're in the same union aren't you?

AL

1:03 When the same union and all the guys go to school together and.

JOSEPH SUMMERELL

1:07 Okay.

AL

1:10 I can't believe it was going on 30 years for me this.

JOSEPH SUMMERELL

1:16 You feel older or wiser both?

AL

1:19 A little bit above. I wake up with a little pain every morning. I understand what my dad be talking about. My dad is 83 and he, he'd be 83 in a couple of days, but he has this pain and he helps. And now it's back to me. I'm like now I see what he needs.

JOSEPH SUMMERELL

1:38 Yeah, my dad started to complain about his shoulders a lot, but my dad's a big bird Hunter. He's actually driving out to South Dakota right now.

AL

1:46 Well...

JOSEPH SUMMERELL

1:47 And he was complaining about something around the house to my mom and then immediately takes off to go to South Dakota to go bird hunting. And my mom was like, you know, that pain seems to be really selective when you're shot on versus, when you're picking up some tool around the house.

AL

2:07 You're there retire?

JOSEPH SUMMERELL

2:09 He is, yes, sir. Now.

AL

2:11 I remember how tired about he like to go out and have fun but by the now he's at the stage where he can't really get away like he used to.

JOSEPH SUMMERELL

2:19 He...

AL

2:20 Was big into fishing? Okay. Yeah, he don't me go out unless I take him out.

JOSEPH SUMMERELL

2:28 Salt water or fresh water or whatever you can give you.

AL

2:31 Fresh water, mostly, you know, some of the local laps and stuff, but, you know... he's in pretty decent health but, he just can't go by. He can't see that well, he wear glasses, but he can't he had a lot of surgery.

JOSEPH SUMMERELL

2:49 Yeah, that's tough. My dad's a saltwater fisherman and he had some surgeries on his back recently too and that threw off his balance. And so he's down there always working on his boat, but can't really take it out and I'm my dad just focus on your PT and get better and then you can actually go take your boat... but you don't listen too well. Anyway, it looks like everybody else is joining up morning, everybody.

AL

3:15 Good.

DEEN

3:18 Morning.

JOSEPH SUMMERELL

3:20 All right. You all know, Brooke, she has joined us from Brighton early for you out there in California. Yeah. Nice to see everyone. We've got two new faces on our end. Ryan heart and Peter, they're both from our development team. So we'll show you the new tasking that we're rolling out and they'll be here to answer questions and go deeper into any details that you really want to see more of. I imagine we're still waiting on a Lane.

JOSEPH SUMMERELL

3:54 Thank, he went on mute all.

AL

3:58 While I was yelling in the office to turn mine.

JOSEPH SUMMERELL

4:03 I got you. Well. Any other questions? All you or Deen, any other questions popped up since our meeting the other week that I can answer for you?

DEEN

4:17 I wouldn't say any questions. I think seeing some of the mandatory tasking as we go through the steps, I think was one of the features that we like to see, but no real major questions at this point.

JOSEPH SUMMERELL

4:33 Okay. Was that, were you able to dive into that recap link I sent you? Was that pretty easy to navigate?

DEEN

4:44 Yes.

JOSEPH SUMMERELL

4:46 Good to hear. Okay.

REINHARD

4:50 Yeah. Hey, while we're waiting on everybody, just a quick introduction on our end so that we can then focus our time to everything tasking and all the questions that you guys have. So as Jake said, my name is Ryan hartkemp, senior product manager over the core web applications and the mobile applications. So primarily, I'm responsible for the vision and execution for anything that goes into those applications and we'll dive into the details as to what that means, as it relates to tasking and why we chose it and the reason behind it. But that's me.

*--- Access to information ---*

PETER

5:30 Yep. And my name's Peter very, I'm senior manager of product design and user experience here at service straight. So I work hand in hand with Reinhard to make sure that his visions kinda look good and perform well on the screen and that it's intuitive for the users, to use.

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

JOSEPH SUMMERELL

5:48 Fantastic. And on their end, all is the one of the owners of the company and Dean takes care of everything service related. And Joe, I don't think we've actually fully met but I'm Jay, and it sounds like you're a project manager over there is welcome. Yes, I am. Thanks, Jay. Good to meet you to meet you too. All right. Well, I'll go ahead and share my screen and we'll get into it. Are we still waiting on Elayne now?

6:17 Yeah, she's multitask, yes, she might join us in a little bit. So, go ahead.

JOSEPH SUMMERELL

6:20 Okay. This will be, we've got the normal meeting recording thing going so I can send you a copy and put it in that recap link that I sent over to.

--- *Assets* ---

JOSEPH SUMMERELL

6:29 All. Okay. Awesome. Well, I'm gonna jump over here. You'll be able to see the different when you have a service in service trade, you'll be able to have the it's tied to an asset. You'll be able to have the tasking tied to that service, an asset. And once, that tasking, this is it from the office side.

--- *Forms* ---

JOSEPH SUMMERELL

6:51 When it comes up on the technician side, this is kind of what it will look like. The first roll out of this will not be have the tasking be required, but that will come shortly down the road. We're getting the first round of this out and then it'll be required moving forward so you can make check boxes, you can have it fill in certain values. You can also have fill in the blanks. So it's a type in describe the problem that you've found and that's all tied back to it.

REINHARD

7:19 Yeah, just to speak to that just a Tad bit, so number one, because I know you guys are, you know, scoping us out and all that good stuff, anything that we do.

--- *Forms ends* ---

REINHARD

7:31 So anything that, you will see, Peter and I do, we collaborate with customers at all times. So if it's a significant project, we don't do that just on market research, we actually believe that, the products that we develop and the features that we develop become a better product and there's a better solution when we involve you the customers. So with tasking which is one of our major releases this year, we actually spoke with 30 plus customers. We interviewed those customers. We, because when you think about tasking really what it relates to you is if you have service level agreements with customers for which you provide regular maintenance and inspection activities, those you want to be consistent on, you wanted to be reflect and of the promises that you set for your customers.

--- *Quote templates* ---

REINHARD



8:19 And that is what tasking is allowing you to do, right? So it's really enabling you to create templates, one time, associate those templates. And when you create a template, it's guys the limit. You define what goes in a template. You can define sections. You can define tasks that go into those sections.

--- Accounting ---

REINHARD

8:40 Just like Jay showed you here, you can define what those tasks need to be. Are they numeric input? Are they alpha numeric? Are, they drop Downs, multi selections? It gives you basically the freedom to develop it, and create it in the way that makes most sense for you and the customer for which you're servicing, you create a template, and then you can associate that template to one or many assets.

--- Quote templates ---

REINHARD

9:05 And when we say assets, it could be a single asset or an asset group, which makes your management of a particular template super easy. It removes unnecessary overhead where you have to go. And I have to do the same thing on this template and that template. And that template.

--- Assets ---

REINHARD

9:22 And the power above all of this is when you have groups like asset groups. So let's just say you have a customer for which you have a service level agreement, and you say, hey, we're gonna, we're going to service everything in your basement area, right? And you can kinda lump that into now everything has its own schedule, right? Because you can have chillers, boilers, you can have anything, that might be in there, right? Depending on what you're servicing. So each asset has their independent schedule and then expectations for what tasks needs to be done in what a given time frame. And then you can group that into an asset group, deploy that only to one service.

--- Recurring maintenance ---

REINHARD

10:00 Recurrence and that basically is gonna spit out everything that is due based on timely expectations. Makes it super easy for your dispatchers, your schedulers. So it keeps everything kinda aligned. Expectations are never unclear because the system knows based on a template, this is what is due at this particular month.

--- Recurring maintenance ends ---

REINHARD

10:23 And it basically lumps everything together in a particular service request that could be scheduled be at an appointment. So, it kinda allows you to be super

efficient, remove any ambiguity between your front office and the field. And your technicians never have to wonder what is due. What do I have to do here based on the tasking expectations that we have set in the service level agreement? So I wanted to just kinda set that stage because it's there's a lot of great capability that comes with tasking and it's really all surrounding the expectations that you and the mechanical space and other spaces too are typically setting in service level agreements.

JOSEPH SUMMERELL

11:08 I'm trying to pull up my phone here so I can show you all exactly where that will land, in the mobile.

*--- Access to information ---*

REINHARD

11:17 Peter, you have the figmas available that we can showcase, right? So Jay, no, no need for you to do that. We got that ready here on our end... and we can kinda show...

JOSEPH SUMMERELL

11:28 That to you as well. Are you all seeing my mobile app here? Yep. Great. Well, the thing I wanted to show Ryan hard is, hey, this is the mobile app ad is as it exists today. These are, this is the tile where the tasking is gonna go. Correct? That is correct.

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

PETER

11:45 Correct. Yep.

JOSEPH SUMMERELL

11:46 Great. So the other thing I wanted to show is as service trade exists right now, we do have a lot of things that can be required. So let's say, I'm clocking out of this job and say, I'm done with the appointment. I had just a compressor replacement on a big industrial freezer setup for today.

*--- Deficiencies ---*

JOSEPH SUMMERELL

12:03 When I go to continue clocking out, it'll force me to attach a picture, leave a comment and record the issue, that was found. So this can be the diagnosis and what is needed, the diagnosis and the troubleshooting. And then the comment can be, hey, this is how I repaired the issue. So I can go in here.

*--- Deficiencies ends ---*

DEEN

12:24 Okay. Before we get too far. So when does that tasking roll in now?

REINHARD

12:29 So we are starting with, and again, I'm gonna give you a little bit more insight as to what we're doing it within our process. But before we roll up anything major like that, we start an early adopter program and we invite, we typically, you know, I have to do some Cherry picking of sort, but we invite everyone that is interested and is within that Cherry picking conceptual... list of customers that we would like to perhaps participate.

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

REINHARD

12:54 That is starting in the next three to four weeks. So we're hoping to get that started pretty soon. We, we are typically in the E, a phase for about I wanna say roughly about a, month and a half, sometimes a couple of months. And then it will be available what we call within open data to everyone that wants to have it within the tiers that are it will be available for. So, it will start fairly soon. So in about three weeks, you can get your hands on that. If you were obviously on board, with service trade and then you would just participate in that early adopted program.

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

REINHARD

13:31 We have a program like that right now for our new dispatch that we just released. And what we do is we give you access to that and it's nothing intrusive. So it's just a navigation within the main nav and you can, you know, expose that to, your staff. You can interact with it. You can use it on live projects because it's been fully developed, fully tested. And then we meet once a week. You give us feedback on the things that you find. And the good thing about that is you have a say, so in part of the development process. So in the dispatch, we've been doing it for about two weeks now and we've gotten 104 different feedback points, 75 percent of those we're addressing. So Peter and I are triaging those things. We're paying attention to what the needs are, and we're fixing that. So about three weeks is when you can expect that to start.

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

JOSEPH SUMMERELL

14:24 In simple terms, the tasking should be out very beginning of next year if all goes according to plan, which is before you all would be if you all signed with service trade today that's a month or two before you'd even be live. So it'll be there ready to roll by the time you're using service trade.

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

REINHARD

14:41 Yeah. And the beauty about that is.

DEEN

14:43 Good.

REINHARD

14:44 Yeah, but in time you would turn it on, it would be fully tested, fully vetted by a number of customers. So it's ready to go at that point.

JOSEPH SUMMERELL

14:53 We'll have done all the testing and gotten any bugs out by that point. Ideally. Yeah. Okay. Cool. What other questions you'll have around that?

--- *Purchase decision* ---

JOSEPH SUMMERELL

15:14 You want to go in a little bit deeper of a walkthrough with Peter to show you what it looks like more than just that video or did that give you a good conceptualization of what we're doing?

DEEN

15:29 That was a good conceptualization. We can go along with the other stuff. If we have time. We maybe dig back a little deeper into it.

JOSEPH SUMMERELL

15:37 Okay. Well, the other stuff I wanted to cover was really just, the pricing and answering questions in that we'll go through that recap link together. So I was gonna let the we're like Ryan heart and Peter roll. So if there are questions you do want to do a quick thing of it, let's tackle that. Now. If you don't mind Deen.

--- *Purchase decision ends* ---

DEEN

15:56 Okay. We can go through it.

JOSEPH SUMMERELL

15:59 Cool. All right, Peter. Yeah. Let's do a quick high level glance at it.

PETER

16:08 Sounds good. All right. So, yeah, I'll take you through, the kind of top to bottom flow, of how this works, but, and we're looking at sort of like a workable prototype here, but all of tasking will be sort of like based off of templates.

--- *Quote templates* ---

PETER

16:22 So we'll have a new template section here. I have a few dummy ones place, but you can create as many templates as you want. And I have like a general AC unit tasking here. And this is your tasking template creation world. You can associate that template to either one or multiple asset types.

--- Assets ---

PETER

16:40 You can see here. I have it assigned to AC unit and hvac as, the paired asset types. And then the task form section is where you're going to build out those different tasks and not only the tasks themselves, but you can reorder them, the types of tasks they are, whether it's a multiple choice, and, you know, all of the bells and whistles that come along with that text field input.

JOSEPH SUMMERELL

17:03 Interrupt, one thing I want to clarify. One of the things they really wanted to use tasking for was, when you were sent on a repair call, hey, what's the problem? What, how did we troubleshoot it? What's the resolution for that type of tasking? Would you just put it to all asset types? And then whenever you send a repair call on any type of asset, it would have those tasks for them. These, these, this is tasking kind of apart from the typical maintenance tasking?

REINHARD

17:31 Yeah. So a couple of things there, J. So number one, we didn't just confine or constrict to having to associate this to a true physical in the building asset, meaning like something that would have to be physically moved into that building or a conceptual group that has a combination of different physical units.

--- ST app contracts and pricing ---

REINHARD

17:55 You can also create a task list against the actual building because in our, in service, state building is a default asset for every location. So you can create against the building. And then you can kinda create, a generic to do list if you will with certain expectations based on whatever you might be laying out for a number of customers.

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

REINHARD

18:21 The other thing that's coming because one of the things that you can always expect from us is when we roll out something that is of this size, there's always an MVP roll out which is the minimal viable product. But we're already thinking about what is coming shortly after that.

--- Assets ---

REINHARD

18:37 So shortly after that, you will also be able to do tasking at what we call the service level. So you don't have to necessarily attach it to a, to an asset, but you can attach it to a service. So that's gonna solve the problem that you're talking about Jay.

--- *Assets ends* ---

REINHARD

18:52 So it's gonna give you the flexibility to create tasking expectations based on the promise that you made via service level agreements. And then you can also create what we call ad hoc tasking expectations which are specific to a service, not an asset. So you will have that as well.

--- *Forms* ---

PETER

19:13 That answer, does that answer the question on that end?

JOSEPH SUMMERELL

19:19 Makes sense to me. It makes sense to you all if not, I can explain more. We sometimes use some of our own internal jargon, and can get people a little lost with it.

DEEN

19:30 It makes sense. So we're going to attach it to the building and do maybe different text fields and require those text fields as the tasking.

--- *Recurring maintenance* ---

JOSEPH SUMMERELL

19:37 That's right? Exactly.

PETER

19:41 So I'll keep going once you have your tasks at the template level, you have the choice to set to basically save yourself time anywhere. This, this template is used by setting up a sort of a schedule of when these tasks should occur throughout the year. And, and I'll show you why this is so powerful at the end of this. I, but I can change my frequencies and say, hey, this is, you know, quarterly, this is biannual, and I can select which quarters generally. This is, this should take place. Whether that, you know, recording terms at set point is something that should happen once a year or four times a year.

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

PETER

20:18 All of these are going to be adjustable at the asset level and, or at that location, customer service agreement level. So hold tight on this. In addition to that, there's a

handy little feature here though that if you want to get as granular as putting in the estimated duration of how long it should take a tech to do this and really put some kind of like guardrails around it.

--- *Recurring maintenance* ---

PETER

20:43 The those durations are going to be used to bubble up and sum up at each service request level to give you the estimated time that the appointment should take if you're driving that recurring service off of this tasking schedule. So I'm gonna save this template and we'll go over to an actual asset on a specific location to see, what that happens to spit out.

--- *Assets* ---

PETER

21:09 And we'll see, okay, hey, I have a AC unit at this given location is the first time. Maybe I'm working with it. I see that there is tasking available because I have a template setup for that asset type. I want to enable tasking for this asset. So now, it's gonna pull in that schedule just off the bat that I had from the template schedule, I can select from any template that I have paired with AC unit, the asset type. So again, I can make 10 different templates for AC units, whether that's by manufacturer or a generic one or one that is sort of a mix of the two based on my SPS. And this is where I can start to adjust the tasking schedule for my agreement with that customer.

--- *Pricing* ---

PETER

21:55 And say, you know what? I want this to start maybe, in may rather than April or I want the recorded thermostat set point to happen twice this year, not just once. This is where I can make it custom to that specific customer. You can see here. We, we can also do multi year tasks if something happens less frequently than once a year. So every two years starting November 20. 10.

--- *Recurring maintenance* ---

JOSEPH SUMMERELL

22:21 23 for...

PETER

22:22 Example, so once you've done that, all you need to do then is when you are setting up the service, you'll, we engineered this specifically so that it works on for our existing customers with their existing recurring services as well as creating new services. So because I've selected, that asset in creating a service, I will now see this bar that comes up that says, hey, this asset has a tasking schedule. Do you wanna use it or not right? You have that option? So I'm gonna use it and this is where I'm going to set up my services to match, that schedule that we've laid out in, that asset. So we can see, I'm gonna create a quarterly service that's gonna cover or three out of my four buckets, in that service schedule. And then I'll create another one after this that

can handle the annual. And the reason why we split this up into creating multiple services for those is you wanna be able to make sure that, your description maybe your preferred text, the estimated price, your estimated duration are not bubbling everything together and getting confusing your annual may be, may have a completely different service template or description because of what's being done, on an annual as opposed, to a quarterly. For example. Does that make sense? Any questions so far? Awesome? So lastly, once you've kind of like once you've done that and you've scheduled, the recurring service and you have a service request here, there will be a tasking tab. So what we're looking at is sort of like wild this while this appointment, is happening, right?

--- Assets ---

PETER

24:10 And I can see in this example, I'm actually using an asset group. So there's multiple assets that have tasking applied to it that the tech is supposed to do. And we can say, hey, you know, I wanna see how this appointment is going right here. I see that the tech, Mike Wilson has done two out of the four tasks for this particular five ton unit and I can click right here and see sort of what the inputs have been on, for instance, a text input task. So this is Mike's answer on describing what he's found, right? And the yep.

JOSEPH SUMMERELL

24:44 In their example, if you are doing like diagnostics and then troubleshooting, you can see when they've diagnosed the issue. And then now they're starting to troubleshoot it. Maybe they've just finished troubleshooting, you can see what it is. And then all right, cool. Now they're working on the repair piece of it, right?

PETER

25:01 Exactly. And what we're aiming towards for this that will likely be available in the beginning of the year is taking these results and having sort of an asset history, an asset tasking history section. So on every asset that you've ever done tasking for, you can see a retrospective of, a timeline sort of recording of what has been, the voltage recorded, the last three services or what has been, what the tech has described for the last year on this particular asset. So it's giving you greater visibility into the life and the kind of like the service history almost, of a particular asset that has used tasking. And of course, as what's been mentioned a couple of times on this, making either some or all of these tasks required, at the template level or at the asset level will likely be coming by that time too. On the technician side just kind of covered this already. But let's give this a refresh. The, the tech will be able to see any asset that they have tasks to perform. So it's split up by asset. They can dive into each one, you know, check box ones get a simple check box saying that they did it.

--- Recurring maintenance ---

PETER

26:25 They can select multiple choice. This is basically just an output of what would as decided from that template. And ultimately that asset schedule. And these can contain because of that schedule, I go back real quick. These tasks can contain... both annual and quarterly tasks. Just whatever happens to line up on that visit. So it's



you're really condensing and optimizing your tasks so that your tech isn't jumping all over to go see annual tasks, go see quarterly tasks. This is, this is everything that they need to do on that visit because maybe it's a three and one and you're doing quarterly tasks as well as something that you have to do once a year.

*--- Recurring maintenance ends ---*

REINHARD

27:15 And real quick just, to kind of bring this all together. Do you mind showing, the tasking lists schedule one more time? Because this is where...

PETER

27:24 Level?

REINHARD

27:25 At the asset level, even our customers that have been using this for a while as we were sharing with them, the vision, it just clicks because they're like my goodness that's powerful.

*--- Recurring maintenance ---*

REINHARD

27:35 So, each of the months that you see here, each column, think of that because once you deploy that to the recurring services engine, what the system is gonna do, imagine if you had an asset group here and you had a number of assets, well, that recurring services engine is gonna look at your schedule across anything that is part of that group. And it's gonna say, okay, let's do for January or what's do for?

JOSEPH SUMMERELL

28:01 For...

REINHARD

28:02 April. And it's gonna combine all of those things, put them in a service request because the service recurrence engine spits out what's due basically three months in advance so that your scheduler and your dispatcher can grab that and say, I'm gonna go ahead and schedule that out. But it makes it that easy because it, the system says, I have these many things do for...

JOSEPH SUMMERELL

28:24 Or April.

REINHARD

28:25 Combines them all, it removes the guessing, it removes the, hey, what did we say? We're gonna do on disagreement? What happens with it? And the reason why we allow you to or enable you to say, this is my quarterly. This is my annual, the

system that is smart enough to say, okay, let's look at what's due for this month. That is for quarterly annual, whatever, the permutation might.

*--- Recurring maintenance ends ---*

JOSEPH SUMMERELL

28:47 Would be.

REINHARD

28:48 It allows you to manage those separately. But it brings it all together so that your technicians at all times understand this is what I have to do because this is what the front office, the project managers, the sales people, what they sold to that customer and, what they expect to be delivered on a, so it's super powerful. It allows you to kind of bring everything into one, remove this whole I'm having to manage paperwork. I'm having to make sure that the technicians do this and that, you can communicate them by simply creating the template, deploying that template, I guess.

JOSEPH SUMMERELL

29:22 But after that, just magic happens.

REINHARD

29:24 So, this all comes about and it should be reflected of how mechanical contractors service comes work and even permeates into other industries because we talked to so many customers, right? And that is.

JOSEPH SUMMERELL

29:38 The, the beauty about this.

REINHARD

29:40 It's reflected of how you work, not how we want you to work with our system. It's the system working in the...

JOSEPH SUMMERELL

29:46 Way that you are actually executing.

REINHARD

29:48 So, so again, this is just something that you can expect from us.

JOSEPH SUMMERELL

29:53 Elaboration.

REINHARD

29:54 Getting feedback from you. And based on that feedback, we have functioning product.

JOSEPH SUMMERELL

29:58 That works with your.

REINHARD

29:59 Workflows, right? Because we have done our due diligence to understand how you work, how your front office works or your technicians execute. And that's how we carry out any kind of.

JOSEPH SUMMERELL

30:10 Roll out, of this magnitude. So awesome. Well, Peter Reinhard, really appreciate it guys from a RS. Do you have any other questions for them?

AL

30:25 I may have a question with perfect. Where I have this whole big database we've been using five or six years, right? Is it any way for us to transfer some of that data into service tray?

*--- Recurring maintenance ---*

JOSEPH SUMMERELL

30:38 A lot of that data can come over as far as customers locations, assets any sort of recurring service intervals. Absolutely. We'll bring all that over as part of the onboarding process when it comes to past jobs or past invoices. Typically, no, sir, that, that's a different format and the way that it's set up there versus the way it comes into service trade.

*--- Recurring maintenance ends ---*

JOSEPH SUMMERELL

31:03 So, what a lot of folks are doing is keeping their old database for the first year or two as something to reference on history and then over time that will start to build within service trade. But all the basics to really drive forward, we will be able to bring over okay?

JOSEPH SUMMERELL

31:28 Cool. Well, Peter, Ryan heart, appreciate your time. You all can jump and we'll hop into our recap space.

PETER

31:36 Sounds good. Nice to meet you.

AL

31:39 Have a good one.

JOSEPH SUMMERELL

31:43 All right. So, does this look familiar to you?

AL

31:48 Yep.

JOSEPH SUMMERELL

31:49 Should be that page I sent over? How, how do you like this? By the way we've had, we've been using it now for about eight months and some people get in there and see everything and really like it, but others just like never even click on it. And I'm trying to gauge how useful it is for folks like you?

AL

32:07 I kinda looked at it, but over there it works, it's a good place to keep everything I think so.

JOSEPH SUMMERELL

32:16 Great.

AL

32:17 Helps out, keeps me from calling you.

JOSEPH SUMMERELL

32:21 Well, we were just wound up having so many different e-mail threads with prospects and things were just difficult to find. So.

AL

32:28 Role...

JOSEPH SUMMERELL

32:28 System out. What I wanted to jump to here is the investment and pricing section. So this is just basic pricing that I shared, put everything together and discounted off the first year of Northboundary and service time card... from the get go and, the payment structure. Our, our contracts guy did not split that out in any way, but of course, we can certainly split that out into annual or something like that. Does this, how does this align with your budget though, as far as what you had planned for this project and you're moving to potentially BuildOps or service trade?

AL

33:10 Well, this is, you know, BuildOps and you guys both, are more expensive than perfect where it is. So we knew we've got to spend more money on this, but hopefully it works better and it, is a better product. Now when you say terms two years. So that, so that price is only good for two years.

--- Pricing ---

33:37 So...

JOSEPH SUMMERELL

33:37 The, the way we do our contracts, we need to do an annual contract or a two year contract or a three year contract. That's just kind of the agreement that we set up with the payment terms, we can set up payment to say be annually or semi annually, something like that. And that's all things that we can negotiate for coming to an agreement as far as the pricing. We, when you go into a longer term contract with us in that pricing for longer. Now, when, I guess in the day we never raise your rate. And more than I believe it's seven percent this two year term, we never raise it by more than seven percent from back to like Peter, something like that. It's not a sort of deal that's not how we roll.

--- Tech time tracking ---

AL

34:38 So it's a separate, so technician license and a time card license is.

JOSEPH SUMMERELL

34:47 They, you know, that the time card application that I showed you?

JOSEPH SUMMERELL

34:55 If you want to track your technicians time, so you'll be able to clock in and out of the service trade jobs. But if you want to have a review process where the technicians time from the jobs, whether it's clock events or labor items, consolidates into a digital time card for review by them then by the office and then kicks out a file for your payroll, that time card piece is, and that we had briefly discussed when I was you?

--- Tech time tracking ends ---

AL

35:24 Okay. I kinda remember the discussion. So basically go back to the pricing.

AL

35:37 All right. Okay.

AL

35:45 What is the Northboundary sales user? What is that?

JOSEPH SUMMERELL

35:50 Northboundary, is that system we talked about right at the end for proposing projects and maintenance agreements where you can go in and use that as Ray data to, well, you can scan equipment in and then you can have templates and use as a

data to essentially take all the equipment and put a new business proposal together very quickly. And it has CRM capabilities. So your sales people can track pipeline. They can track activity. You can track how they're doing to their goals, things like that. And then you can send out contracts for E signature through the system. And once they are one and signed, then you can just push it directly into service trade to go deliver that work.

*--- Tech time tracking ---*

AL

36:33 And that's the one you told me this is gonna have me out for when you're free, right?

JOSEPH SUMMERELL

36:36 That's right? Yes, sir. That and the time card, which is reflected in that price.

AL

36:43 Okay.

AL

36:49 Okay. I'll go in and read out the terms and stuff, but you cleared up a lot of stuff that I didn't quite on this. So I don't necessarily have to have this time card thing.

JOSEPH SUMMERELL

37:00 You do not, no, sir.

AL

37:02 So, how would I keep up with the time if I don't have a time?

JOSEPH SUMMERELL

37:06 It'll still all consolidate onto a job and say, hey, this is how many hours or minutes you have put to a job where it simplifies things, is getting that data from service trade to wherever you're doing payroll.

*--- Tech time tracking ends ---*

JOSEPH SUMMERELL

37:20 Okay? And really, I mean, that's why that's one of those things where I could... I'd say, let me give it to you for the first at least or something like that.

AL

37:36 Give it like it and we'll continue to pay for it. It's...

JOSEPH SUMMERELL

37:47 It's really useful when it comes to getting data together for payroll.

--- Pricing ---

AL

37:49 Right. I mean, if it simplifies it and I guess you added all the helpers in to come up with 24?

JOSEPH SUMMERELL

37:58 Correct. Yes, sir. I've got 15 full technician licenses and nine helpers according to the numbers that Elayne.

AL

38:05 Okay.

JOSEPH SUMMERELL

38:11 So, we do really want to earn your business. What are your thoughts?

--- Pricing ends ---

AL

38:14 No, no, I mean, I'm not defining like I said, it's a big change for us and I just want to understand what I'm getting into. So currently, the, what you call your Hopper license is our Construction team, right?

JOSEPH SUMMERELL

38:33 Yes, sir.

AL

38:36 And typically, we have one form an, that takes care of the whole team.

--- Tech time tracking ---

AL

38:45 In other words, maybe two form. I might have a pipe fitter, form an and a metal forma. So, could I get a technician license for those two guys... and they'll be able to keep up with their teams time?

JOSEPH SUMMERELL

39:02 If they all clock in and out at the same time and they're all always scheduled together?

--- Access to information ---

AL

39:07 The same job. Yeah. Okay. So, I'm thinking about that because... pipefitters and technicians don't necessarily, we don't get them laptops and tablets and all that stuff. You know, we get a form in... a tablet or a laptop or a, and a phone. But some of the guys, you know, they may only be here for a project.

--- Access to information ends ---

AL

39:36 They only might work with us for six or eight months and then they go to the next, you know, they might end up at another company or something. I got. You. I don't necessarily want to buy a license for every single pipe fitter or sheet a guy that I have.

--- Access to information ---

JOSEPH SUMMERELL

39:51 The other functionality they get with that helper license is the ability to go into a job and snap pictures so they can add and edit their own attachments. But if you want them to just go take a picture and send it to the Foreman, then the Foreman can put it into service trade. We have plenty of folks that do that on their Construction side as well.

--- Access to information ends ---

AL

40:10 Right. Yeah. On the Construction side, the form and pretty much is the lead guy. So.

JOSEPH SUMMERELL

40:15 Right.

AL

40:16 I don't know if you work with a pi fit, but.

JOSEPH SUMMERELL

40:19 I have, they don't take pictures too well. They.

AL

40:22 They're not necessarily computer savvy there. Most of them, they come to a job knowing that they're working their way out of the job.

--- Pricing ---

AL



40:32 That's their philosophy is that, you know, I'm just here to do this and a couple of months, I'll be gone. I'm not worried about it, but typically like a form we keep in three years. So, but that's just something to think about. I mean, I'm just, I'm not opposed to it. I may have a couple of guys on that on the EPA license, but most of the guys, in other words, I may add a couple of guys on the technician license and take away some of those guys from the helper license. And I'll just have to review that with my team and decide how we're going to do that.

--- Pricing ends ---

ELAYNE

41:13 Excuse me, I have a question. We have right now, currently, we have the sheet metal guys ready, send me their time. May they be working on a project or Deen and contact them and have them go out on a TAM? Is it possible that I can add their time in like I'm doing now? In perfect way, it's just so I can capture their time that they worked on a job that Deen assigned to them for service call project?

JOSEPH SUMMERELL

41:45 So, for a pipe or something can?

AL

41:47 Yeah, I think that's what we just talked about, but as a...

ELAYNE

41:54 They don't they don't have access at all but Dean or one of the other guys may need them to work on a project on the hvac side.

--- Tech time tracking ---

AL

42:03 They...

ELAYNE

42:03 Sent me their time and I added intuit, capturing the hour. So when we're ready to Bill, we see that, am I able to add that in manual?

JOSEPH SUMMERELL

42:13 Absolutely. Yeah. You just, same place where you're adding parts or labor and all the billable items, you can add in labor and source it to that technician, even though it's not being entered in by the technician in the field. Of course.

--- Pricing ---

ELAYNE

42:27 And I'll be able to add whatever resolution he provides to me via e-mail into that call. So when Deen the number of view?

JOSEPH SUMMERELL

42:34 That is correct.

DEEN

42:38 I have a question.

AL

42:40 Great.

DEEN

42:40 So, so let's say we to the middle of the year and this coming up on summer time and we have to onboard two additional technicians for the last six months of the year. How would that work?

*--- Pricing ends ---*

JOSEPH SUMMERELL

42:55 Yeah, great question. So you can add a technician at any time. We never restrict you from doing that because in, the day you get somebody new and we don't want you to have to call us and be like, hey, can you turn on a new technician? Because I can just slow you down?

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

JOSEPH SUMMERELL

43:11 So you just add it in your account, mark them as a technician and they can start rolling. We do, can we do keep tabs on that? So we usually have at least a quarterly like once you're up and going, we usually at least have a quarterly call with your account manager to kinda talk through how things are going, where to improve.

*--- Pricing ---*

JOSEPH SUMMERELL

43:28 And on that quarterly call, we'll be able to say, hey, wow, great. Looks like you added another guy. We'll prorate that through the end of your term. So, if that six months through a annual contract, you only pay for six months with that technician, not going to create a whole new contract or anything like that?

AL

43:50 So, just for me to recap, so quarterly, you're gonna reevaluate the number of license that you have... if it can go up or it can go down.

JOSEPH SUMMERELL

44:03 So that, that's where if you sign on for 15 licenses, you have 15 licenses for the year, if it goes up to rate, if it goes down, ideally, you're putting somebody else in that seat. So you can just have somebody go and add somebody in and not add any real licenses at the end of the annual or BI annual contract. If you have gone down, then we can readjust and drop it to 13 or whatever it is at that point.

AL

44:27 Okay. I'm sure, once I read the terms, I can see all of that. But so basically, if I sign up for 15, I got 15 throughout the whole year.

--- Pricing ends ---

JOSEPH SUMMERELL

44:36 That's correct?

AL

44:37 And so the end of the contract rather.

JOSEPH SUMMERELL

44:40 That's correct. And that quarterly meeting is really our account manager's. Job is to make sure you're getting as much value out of the system as possible. So they can take like your quote approval rates or how many jobs are you actually completing on time and they can look at it with you. And they can also take some anonymous data from somebody else and say, well, these people in Minnesota, they're a similar sized company doing similar work, kind of benchmark you against your peers. So you can see how your whole business is doing because we want to be able to help push you all to be the best business that you can be. Okay?

--- Purchase decision ---

JOSEPH SUMMERELL

45:24 Awesome. Well, what are your next steps with BuildOps? I know one of my broker is bosses are going to be wondering, hey, the, that a RS meeting? How do you go? When do you think we'll be able to get a yes or a note from them? What are you all think of as far as timelines on making this decision? And what next steps are?

--- Implementation and ongoing support ---

AL

45:47 Again, I wanna be up and running... early January. So my decision making will be in the next couple of weeks mid November. I'm definitely gonna commit to somebody.

JOSEPH SUMMERELL

46:07 Okay. When you say up and running early January, that's starting onboarding, right?

AL

46:13 Yes.

JOSEPH SUMMERELL

46:14 Okay. Yeah. I was gonna say that, is that's a lofty goal to get up and running and be full.

AL

46:20 No, no, I just wanna, I'll start onboarding in January, one... one during the month of December. It seems like everybody wants to take a vacation. It's hard to get work done in December and then our customers have projects they want. We do a lot of schools and colleges. So, they have these projects set up for the last two weeks of the year.

--- Purchase decision ---

AL

46:54 So, at the end of the year is not really good to try to start onboarding, but started in January, we started in January. We should be up and running by the beginning of the second quarter. So, and be familiar with the 10 summer time, yes.

JOSEPH SUMMERELL

47:09 Absolutely.

AL

47:11 So, but still, you know, we gotta make a decision and give me a couple of weeks. Yeah, I'm looking good. You're looking good. You still?

JOSEPH SUMMERELL

47:25 The driver seat?

AL

47:26 Or were you sit in?

JOSEPH SUMMERELL

47:26 The shotgun?

AL

47:27 Yeah, I'll give you that little bit that, you know, you send in the driver seat.

JOSEPH SUMMERELL

47:32 I like to hear.

AL

47:33 I'll see them.

JOSEPH SUMMERELL

47:34 Well...

AL

47:35 You know, if I?

JOSEPH SUMMERELL

47:37 Your time... yup.

AL

47:41 How's it gonna say? Sorry, I'm gonna sit down with Deen and Elayne and then I got to sit down with my business partner because that's a pretty big investment.

--- *Purchase decision ends* ---

AL

47:54 It's you know, we don't want to take it lively because once we change, it's gonna be, we're going to be stuck with it for five or six years. It's not going to be something we can just say, hey, you know, just like perfect where we don't want to just change all the time. So that's why we're going through.

JOSEPH SUMMERELL

48:09 Stuck with it. We don't we don't want you to feel like you're stuck with it. We want you to feel like we're in a committed partnership that's a better way to put it, right?

AL

48:16 Yeah, yeah, to switch on in.

JOSEPH SUMMERELL

48:20 Now, do you have Brad boss number?

AL

48:23 No, everything.

JOSEPH SUMMERELL

48:27 If not, I might reach out to him and see if he'd be all right, talking with you because he'd be a great resource, to really talk through the value of service trade and

that sort of thing. I know he's in your market, but he's the nicest guy, one of the nicest guys I've ever met and he'd be happy to talk with you. I can imagine.

--- Dispatch ---

AL

48:43 I'm surprised. I hadn't met him.

ELAYNE

48:44 You met him, Deen? Yeah.

DEEN

48:48 Brad?

AL

48:52 I know Greg, is he in related?

DEEN

48:59 I believe so. Okay.

JOSEPH SUMMERELL

49:01 I'm a Mat, Greg.

AL

49:04 Alright, Jay, you did good. So.

JOSEPH SUMMERELL

49:08 Awesome. Well, we'll talk with you soon. All I'll how about you want me to give you a shout in the next week and we can talk next steps?

--- ST app contracts and pricing ---

AL

49:16 Yeah, if...

JOSEPH SUMMERELL

49:17 There's any. Okay? And if anything comes up with you all are budgeting for this and comparing us to build ups, we certainly want to earn your business. So, let us know if there's how we can restructure this or what it's gonna take to do that.

AL

49:31 Yeah, bascally, it's the same thing, right?

JOSEPH SUMMERELL

49:34 No, they do.

AL

49:36 I think we want something that works good for us that's mainly, you know, be honest with you, our prices are right there, neck, and.

JOSEPH SUMMERELL

49:46 But I think we're one of the things that we have experience on them on, is it well experience? We've been around for 10 years and we have over 1,300 customers. Now, they've been around for about four... and don't have near as many customers especially not live. And on the system, they've got a lot that are still in their onboarding phase which... we'll see if they get out and get live... appreciate your time this morning. Let me know if you have any questions. You can shoot me an e-mail call me. You should have my contact info.

AL

50:24 All right. See you later. Bye bye.

DEEN

50:26 Thanks.

JOSEPH SUMMERELL

50:27 Thanks, everybody.

*The End*