



ServiceTrade Demo with Diamond Elevator

Susan Warren with Diamond Elevator
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Participants

SERVICETRADE

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SDR

DIAMOND ELEVATOR

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Service Account Manager

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Transcript

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

SUSAN

0:00 Good morning.

BARBARA

0:01 Good morning. How are you?

SUSAN

0:03 I'm, good. How are you?

BARBARA

0:05 I'm okay.

SUSAN

0:07 Thanks for hopping on with me. I'm Susan Warren, I'm a territory manager here at service trade... basically game plan for today. If it sounds good to you wanna spend a good chunk of time learning more about your business, what your goals are, what you're hoping to achieve with a tool like this, then give you a little bit back story about service trade and then, you know, jump into the workflows itself. Sounds good. I know we blocked an hour for this. Do you have any hard stops before the?

BARBARA

0:39 No, I'm good.

SUSAN

0:41 Very good. Awesome. Well, kinda start off just by confirming some details that you got from your call from will. So first of all, are you, the service coordinator there?

BARBARA

0:56 I am, I'm like the service account manager... I'm not actually scheduling the service, but I'm overseeing it.

--- Pricing ---

SUSAN

1:05 Gotcha. And in terms of total number of folks doing work out in the field, is that for technicians, is that accurate?

BARBARA

1:13 It might be six, you know, it just depends who we decide to give access to and who we may need, you know, eventually, if everything works, it might be all about anywhere. I can range from six to 10. We have two locations.

--- *Type of work* ---

SUSAN

1:30 Gotcha. So there's 10 total folks.

BARBARA

1:34 I like that.

SUSAN

1:36 Gotcha.

BARBARA

1:38 That's service text that's how people in the office?

SUSAN

1:42 Perfect. Exactly. Yeah. And if you had to think about, you know, the jobs overall by job volume, what percentage would you say is commercial compared to single family?

BARBARA

1:54 Only 30 percent?

SUSAN

1:59 So, so it's 30 percent commercial?

BARBARA

2:02 Yeah, 20 to 30 percent commercial. The rest is residential.

SUSAN

2:06 You say residential, you mean like you're dealing with the home owner, single family?

BARBARA

2:11 For the service side, yes.

SUSAN

2:14 Gotcha. And then with the, you say with the service ad, if you had to think about your job volume like Installation versus service, just to be clear, are we looking for a tool that's just for service? Or would it also need to be for Installation?

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

BARBARA

2:32 We haven't made that determination. It's a good question. We are considering something like Salesforce which potentially could manage the whole business. But initially we had started working with a product called FieldBoss. I don't know if you've ever heard of it. But anyway, so it just, it lacks certain things that we want. It's very cumbersome. And so we decided to look and see what our other options are. So that would manage the service piece, but it wouldn't do anything else. Well, theoretically it wouldn't but we have two other pieces, the sales piece and the project management piece, right? Because for example, when we're doing Installation, you know, we're talking about primarily two things.

--- *Type of work* ---

BARBARA

3:23 One is home elevators and wheel this and buildings, but the home elevators is the biggest part. So, you know, you're selling it maybe to the builder, you know, you're doing all your work, you have all different phases. But when it comes to the service side, then it's typically the home.

SUSAN

3:40 Gotcha. No, that makes sense. And in full kind of disclosure with us, you know, we can certainly handle the installs, you know, things that are generally less than six months that don't require like general contract or involvement that don't involve AI billing...

BARBARA

3:57 So, this, I don't think that. So what I'm looking at is mostly ones that are for the service dispatch side.

SUSAN

4:06 Gotcha. So thinking about that service side, if you had to think about two buckets by job volume, what percentage would you say is more reactive repairs, somebody calling you up? And you going out there? And then what percentage do you think is more proactive plan, maintenance? You going out there unprompted?

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

BARBARA

4:28 That's a good question that I don't know if I can answer, I've only been with the company a couple of months. My first project had been to get the FieldBoss up and running. And that's what led us to. And that was two months ago. So I don't know if I can answer that, it's absolutely, at least. I mean, I think the service side is bigger.

--- Type of work ---

SUSAN

4:51 Well, I mean, like...

BARBARA

4:53 In terms of plan versus?

SUSAN

4:55 Reactive?

BARBARA

4:58 I don't know if I can intelligently answer that.

SUSAN

5:01 Totally fine. But if you had to guess just, you know, intuitively, which you did slightly more of which would you lean towards?

BARBARA

5:09 I might go 50 50 if, I might, yeah. Does it matter?

SUSAN

5:15 No, I'm curious of something, I will say, you know. So... service trade is designed to, you know, handle all of the work that you're describing. But one of our biggest value adds is the ability to keep up with and grow the volume of planned maintenance and proactive work, and being able to get that pull-through revenue from those planned visits. So, just trying to get a ballpark. I mean, I'd be a little bit concerned if you're like, you know, what, you know, PMS are 10 percent and we don't want to grow.

BARBARA

5:49 No, no, no, no.

SUSAN

5:52 I should... now, on the commercial side, is there a particular building type that you generally go after? Is there any commonality with your customers?

--- Assets ---

BARBARA

6:03 No, it could be any building that has a requirement to be accessible and can't or doesn't need like a full blown elevator, you know? So it can be anything honestly, it could be a store, it could be a business. It could be a place that will never be used, but that area in the building is required to be accessible.

--- Forms ---

BARBARA

6:21 Now, within that service and maintenance is a piece that... is a like a state required inspection. And then sometimes because the state goes out, they inspect these lists and then there's an order to correct or to do something. So there's a whole process in that and we do a lot of that.

--- Forms ends ---

BARBARA

6:44 So that's something like we have paperwork that I would want to be able to have in there so that we can address that because it is a big piece of our business.

SUSAN

6:56 We definitely got you covered with, you know, having, that blank paperwork built in.

BARBARA

7:00 Okay.

SUSAN

7:01 With that and, you know, I saw on the notes you Tad, FieldBoss really wasn't a good fit. Can can tell me about, you know, the shortcomings of FieldBoss. But that didn't really work out for you.

BARBARA

7:12 First of all, I mean to me being let's say not a technology person, it was just beyond cumbersome. I mean, it took me so much time to learn it and I do consider myself an intelligent human being and it was just so complicated. Now, they have layers which are good.

--- Recurring maintenance ---

BARBARA

7:32 Like, so you have your account, then you have your buildings then within that you have all your products. So we need that because we can have one account with multiple buildings, multiple products, we need that. But the way that navigate, you can navigate from so many places. So, for example, they say, okay, we recommend that you make your work order from the building location.

--- ST app contracts and pricing ---

BARBARA

7:53 Okay? Then why do you allow me to make it from anywhere else where it may not carry over thing for like service contracts, if I put my maintenance contract, if I put enter it under the building location, that's fine. But if I enter under the product, it doesn't carry over. So.

--- Access to information ---

SUSAN

8:12 It that...

BARBARA

8:13 It doesn't make sense.

SUSAN

8:14 Yeah. I was letting you put things in places they shouldn't be.

BARBARA

8:18 Exactly. And... it doesn't have, they have a mobile app that they work with, but it's not part of the program and we won't live GPS which they don't have. It's not live tracking.

--- Tech time tracking ---

SUSAN

8:32 Gotcha. Now, when I just to kind of be clear with service trade, we, because most of our customers they have, I'll say most but a good portion of our customers, they're using phones for the guys. And so we actually, so in terms of GPS tracking, we take a time stamp and a GPS stamp whenever they clock in and out of different events. So, you know, clocking into being in route, clocking into being on site, you know, in and out of those categories like that, you'll get that GPS stamp. But just to be clear, we do not offer continuous GPS tracking like you couldn't watch somebody move using ServiceTrade. We do have some.

BARBARA

9:18 I know that you're not the only one who does it that way. There are some that do with either or, but the thing is, so you're dependent on them to clock in around if they don't you don't know where they are.

SUSAN

9:31 Precisely.

BARBARA

9:32 Right. And that could be an issue. I don't know.

--- Tech time tracking ends ---

SUSAN

9:36 Good. So, you guys, you know, you guys went back to pen and paper?

BARBARA

9:46 Well, we were, they had, so they had been trying to implement FieldBoss. I think for two years. I wasn't here. Yeah, they never did because the well, we're a small company that wasn't the time and the understanding. So that was the first project that I could go when I started. And, you know, they invested a good amount of time and money into it. We moved all our accounts into it. I mean, it's all there. But the other thing it doesn't do which is probably even is critical piece is we are different than like some companies in that we collect on site. We don't have receivables for the most part. So when you like, you give your guy a work order, right? He sees it on his phone, he needs to be able to adjust hours and dollars changed. And they couldn't do that unless we gave them full access to the work orders, which means there's a margin of error there that they could screw something up that's something we'll get. And so they really didn't have that ability and we need that.

--- Quote templates ---

SUSAN

10:52 Gotcha. And so I wanna get super clear on what specific things with the work order. Would you want the technician to be able to edit?

BARBARA

11:01 Well, so let's say you go out and it says, you know, this lift is not working. It's one hour so that our, whatever the prices, maybe it takes you three hours, you need to be able to add that maybe you use most of our parts, like would have to be ordered and would be to a quoting process which I'll explain in a minute. But maybe I use a battery, I need to add it with the dollars, those kinds of things.

SUSAN

11:29 Gotcha. Yeah, we can. We can certainly, you know, the technicians can add remove parts, add comments. They can generate a quote from the field. They can.

BARBARA

11:42 How much, how we do it? And I'll explain that we, because our manufacturers, we have a little, we have parts list which we'd like to have in there, but they're really just parts list, not with pricing, most of them because the manufacturers say the pricing changes so often that they really can't... have a price list.

--- Quote templates ends ---

BARBARA

12:03 So we want them to be able to pull a part number, but in most cases, they can't get the price quickly enough. So what they do is right now, if it was today, they're sending back into the office, a paperwork order with what we call the service order,

which specifies how much time, how many people and what they need and what that cost because they've since gotten that information.

--- Quote templates ---

BARBARA

12:26 So they, we want them to be able to send that information back. And then we'll prepare the quote, send it to the customer et.

SUSAN

12:35 Gotcha. That's that's our most common workflow honestly is, you know, basically the tech cleans the field information, like I think we're gonna need this.

--- Deficiencies ---

SUSAN

12:44 I think we need to do that here's. A picture of this broken thing that's out there. And then that gets ported over into the recorder. And then the office can, you know, clean that up as needed. Now, I did see in the notes, something that's a real gotta have for you.

--- Deficiencies ends ---

SUSAN

13:01 I think, you touched on as well is, you know, taking payment out in the field. So I wanna be clear about.

BARBARA

13:08 Yeah, we don't need your system to do that. We have our own system. We just have to be able to do it, but we want a signature. I assume you can take a signature on your.

--- Invoicing ---

SUSAN

13:20 We, so we can take a, do a work acknowledgement and get a signature on site of what, what's been done. So, is there a need to collect payment in the field?

BARBARA

13:34 Well, yes, we have to collect it but not necessarily through service trade.

SUSAN

13:40 Gotcha. So there really isn't necessarily a great way to, for the technician to gather the payment information for that to then be in the field for that to then be processed by a different payment processor. Is that what you're looking to do? Like

for example, like I guess like walk me through, your desired workflow as it comes to that with the text?

BARBARA

14:07 Well, the way that they do it now is, you know, their hand calculating whatever their work or it and the customers giving a credit card, they have readers. So they're either using that reader or they're calling the office to put it through.

SUSAN

14:20 Gotcha. So, so yeah, with service trade really the only way that there is like I said, there's no way to just simply collect the payment information strictly from the app. What for folks that need to, you know, get payment out in the field? Generally, the workflow is for the, and this, you know, with some of the issues you mentioned before, might post a challenge. What you tell me is they can generate the invoice from the field, send e-mail the invoice to the customer and then the customer can then go in, click on that invoice from their e-mail put in payment details and then have it be run in service trade.

BARBARA

15:00 That's one way to do it in our other way is just to do it the other way he calculates it. And then the customer gives them the credit. I don't think that's a game changer?

--- Access to information ---

SUSAN

15:10 Gotcha. Yeah, I just wanna make sure that, you know, that there's like no like payment information storage on mobile app. Okay? Perfect.

BARBARA

15:18 You can't store you, not legally in California. We have to store that. I don't know if you are anywhere but certainly not here.

SUSAN

15:25 Gotcha. Okay. That, that definitely makes sense.

--- Forms ---

BARBARA

15:28 One thing we need so, California is very strict in terms of what has to be on the different kinds of paperwork. So, when we prepare a quote, it's basically the first pages, the price, the second page has some information plus where your deposit is required. But then there's three pages to find print, which we have to have. Is that something you build for us?

--- Quote templates ---

SUSAN

15:54 With, so, is that fan print something that changes with every single quote or is that?

BARBARA

15:59 The same on every one?

SUSAN

16:01 Yeah. So, so when you, what I would recommend is we can certainly do that as basically what you would wanna do is you would just want to bake that into the description. So you could either, when, you know, make that be like part of your quote template to add that information on there.

BARBARA

16:19 What I'm asking is who builds that Temple?

SUSAN

16:22 The office?

BARBARA

16:24 My office of yours.

SUSAN

16:26 You guys do?

BARBARA

16:28 So, we have to build our own templates?

SUSAN

16:30 Yes. And just because, you know, we wouldn't want a bunch of random software engineers, you know, like writing up that description. And so what you would key in is the description and then the parts and labor, and then any additional notation that's necessary.

BARBARA

16:43 Can I have it as a template? I don't want to have to do it every time.

SUSAN

16:47 Yeah. You, you can create those templates you would create the.

--- Quote templates ends ---

BARBARA

16:50 So, same thing for like, on the plan maintenance, we have a checklist, we create that as well.

SUSAN

17:01 So, yeah, if there's like, a specific like form or something where you have to go through.

BARBARA

17:06 Go with every plan maintenance and we can catch it somehow to that work order.

--- *Forms* ---

SUSAN

17:10 You would create that and we can use smart rules to fill in some of the stuff that's already in service trade. So the tech doesn't have to. And then the tech just that's going to be, you create rules like every time you go to this type of customer or this type of asset whatever, then that form automatically appears and then they go through and fill in the relevant values and, you know, through the PDF editor and that gets stored back with the work order. Okay. What are, what are some other gotta have for you?

--- *Forms ends* ---

BARBARA

17:45 Billing being able to put the amount that's one GPS, whether it's live or not. I don't know we help to talk about that, but I know your system is not different than a few of the others that I've looked at. So if you call like for service today, we're typically not scheduling you today. We're telling you you're gonna be put on the list for about two weeks out. We're gonna call you. So in most of the systems you create your work order, but it's just unscheduled, right? And I'm assuming you have that ability to have like a bunch of unscheduled... and then you can just schedule them when you want, you go to that work order. Can you run reports on finding all your, okay. So that's what we do. Now, we do our quotes. I'm assuming you know, when we send the work order, well, when it goes into schedule, it automatically, I guess gets sent to there. So they see where they're going and then map them. If they press a button, does it map them there?

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

SUSAN

18:52 Yeah. Whenever, when I can show that the mobile app, but yeah, whenever they're got an appointment at that location, they just press the directions button, it will open up whatever their native.

BARBARA

19:02 Right. Which then, is that not live tracking, no.

SUSAN

19:07 That's just, it's basically copy and pasting the address into a GPS. Yeah.

--- Paper process ---

BARBARA

19:12 Okay.

SUSAN

19:15 Anything else that's you know, kind of a gotta have for you. I know it's kind of a unique situation because, you know, we got off of FieldBoss, we've kinda gone back. So, I'm sure you're dealing with the pen and paper challenges right now.

BARBARA

19:29 So, right now, the process works like this. You know, we have spreadsheets for every function in the business. Now they work.

SUSAN

19:35 Work honestly?

BARBARA

19:37 But that's how we manage it. And then we have handwritten work orders, handwritten service orders, which then like there's a big time lag between when the person which eventually we need doing the quotes can get them done... the scheduling of routine maintenance. I don't know how we'll see for us because we're kind of a small company. It's always a bit of a balance to try and get to everything. So, how, if we reschedule them, I mean, I like the rescheduling ideal. We just may then have to change them because at that time, right? But to have it automated at least means there's no way that you can lose track of.

--- Paper process ends ---

SUSAN

20:22 You've you've described exactly how we're designed for, you know, planned work, you know, like is the ability to like create the job and say, if we need to get this done at some point in the month of August, and then basically what you do is you run a service opportunities report and say, yes, I want to create all XYZ jobs that are due this month and then it appears on a map based scheduler. So then you can say like all these things are due this month, who do I want to work them in and when, and you can schedule them out in ways that make sense geographically.

BARBARA

20:54 Not through.

SUSAN

20:55 That...

BARBARA

20:56 Way that the reason that my call to other than just research is that my manager who's one of the owners knows someone who is using it.

SUSAN

21:08 Do you know the name of the customer?

BARBARA

21:10 I wanna say it might be like Texas elevator, hold on. Let me look. I can probably tell you... now, I don't know them personally, but I'm guessing that... they probably are similar to us. Let me see it in here.

SUSAN

21:35 Is it American elevator inspections? Nope, that's not it?

BARBARA

21:40 Let's see.

BARBARA

21:50 So, I, let me see it was something Texas with elevators.

SUSAN

22:00 No worries. I was just curious like I'm like...

BARBARA

22:03 A...

SUSAN

22:04 Customer.

BARBARA

22:05 I'm not sure, but I swore that was Texas, something elevate, I know they were in Texas, which isn't that where you were.

SUSAN

22:15 So, the company is based and I am currently in central North Carolina, but we, yeah, we, we've got customers all over Canada and the us. I think we're at 1,300 right now.

SUSAN

22:34 But yeah, any other, you know, in terms of discussions that you've been having things that we have?

BARBARA

22:41 You know, it's kind of gets to be all a blur after a while. So, for example, I roll down field from because they cannot send out like in bulk service contracts, which we would wanna do if we have them, we want to be able to send them out from within.

--- Type of work ---

SUSAN

22:59 When you say bulk service contracts, so.

BARBARA

23:01 Have to be bulk, but like... for renewals, it's just invoicing which we do through, you know, a separate program. So that's not a big deal. But for if you, if we service to lift, and you said, okay, I'm interested in the maintenance contract.

--- Quote templates ---

BARBARA

23:16 Now, I want to be able to send you that maintenance contract. Can I do it from the system? Have the contract in there as a template and send it?

SUSAN

23:24 Yeah. So, so folks do that and I wonder if we'll kind of may have touched on this. So the way that folks that are just using service trade do that is basically they set it up as a quote because you're basically asking someone to sign off on it and, you know, you can create lots of plan, maintenance agreement, quote templates, send that and, you know, send that automatically, you know, well, you know, send that through the templates.

--- Quote templates ends ---

SUSAN

23:51 So that's you know, a little bit automation there, they approve that. And then you can then go forth and set up the job. But in terms of, you know, like for folks that want, really robust proposals when it comes to maintenance agreements like multi pages with pictures. And okay, never mind. Don't need that. We'll go down that.

--- Accounting integrations ---

BARBARA

24:17 Out FieldEdge because in order to use, it has to be linked to your Quickbooks. Well, what we may eventually want to like if we don't want to do that now. So that

was at that because that was how it works. It has to... I have concerns about some of the complaints I'm reading about the different packages. So for example, which one was it? I think it was, I remember like I saw house call pro, which I actually really liked because it was just so simple, right? That doesn't mean it has all the features or not. But then I was concerned because it was like a lot of complaints about like not getting support complaints about, you know... that concerns me about all the companies including yours.

--- Implementation and ongoing support ---

SUSAN

25:11 Entirely fair because the customer experience was like the onboard and what it's like to be supported as a customer that's a huge chunk of it if not more than half. So I will say, you know, just some, you know, stats on that for us, you know, first off is a successful onboarding. So we're gonna depending on the plan that you go with allocate at least 60 or 90 days to a successful onboarding. So that's going to be a dedicated project manager that, you know, you're not going to have one person one week, a different one, the next doing weekly calls, walking you through, the online video certifications for the text for the office workers getting, you know.

BARBARA

25:53 Do you mean video certifications?

SUSAN

25:56 So, so that way, the way that folks can learn is they can, you know, watch videos, so they can learn how to use the tool, you know, that's how I learned it is, you know, it's really like a little online course for them to walkthrough and then they've got a demo account to be playing around with as well. And of course, they can join those weekly calls and ask any additional questions over e-mail during that process. And then, you know, of course, after that, we're gonna make sure that, you know, every, that you're not doing any more long term onboarding that two year onboarding that's not how we operate.

--- Implementation and ongoing support ends ---

SUSAN

26:30 So after that 60 days, when you go live, you've got access to, of course, you know, customer or our average ticket resolution time is less than 17 minutes. So the time, so when reaches out with an issue to the time it's fully resolved is right at that point.

--- Implementation and ongoing support ---

SUSAN

26:46 And then you also get an account manager, so that's somebody that is checking in with you regularly about monthly, just making sure that, you know, everything's going well overall that you're you know, getting your money's worth you're using all the functionality, the tool that you need to be using.

--- Purchase decision ---

SUSAN

27:00 All of that. Okay? And in terms of a decision making process, you know, I saw in the notes that... there he'll probably be some additional folks we'd probably want to bring in. If I...

BARBARA

27:17 Initial just to narrow it down, I think what will happen is once we narrow it, then my managers will get involved. Then we go, you know, full blown, okay, here's. What it can really do. I'm doing the preliminary because like for example, I will out some of those companies already. They don't need to do that. So I, the basics and then we'll take it to the next step after that.

--- Purchase decision ends ---

SUSAN

27:42 Got it. Is there anybody that is still in the running or still on your list to check out?

BARBARA

27:49 I have one more today. I guess who it is. I'll tell you in a minute. Let's see and I'll tell you everything.

SUSAN

27:59 I love it. I give me some insight into.

--- Accounting integrations ---

BARBARA

28:05 Let's see today. I have one more which is with field pulse.

SUSAN

28:12 I'll mix up all the ones that start with field. I'm not gonna.

BARBARA

28:16 So yours, what are their?

SUSAN

28:17 Field or service?

BARBARA

28:18 At field force tracker field pro, max. I can't even remember who that was. I looked at Salesforce, this one, you know, service trade... house co, pro, BuildOps

which can't work for us and.

--- Accounting integrations ends ---

SUSAN

28:41 I ask.

BARBARA

28:42 Why?

SUSAN

28:42 BuildOps would?

BARBARA

28:44 Yeah. What is it that they don't do there's? Something they don't do? They don't do like GPS and they also can't, they, our technicians can't change the work order in the field because they're cared for like kind of more commercial where you're billing you're invoicing after. So that's a game changer. We can't do that. So that will do, build out... this company called, what did I say? The field force tracker? It was interesting. It looked like it could work. But it concerns me when I see a company that I look up the address and it's somebody's house... no, not really do an office somewhere else, but that just really worries me. So, you know, because even if you are working from your house, you're probably in your house now, it doesn't make a difference, but you're not gonna use that as your work address.

SUSAN

29:42 Well, it just makes me, I mean, like even I don't know like, I was trying to find somebody that could come and put more gravel down on my driveway. And like you post an next door and people just like throw out random phone numbers. I'm like, I don't feel good about that. Like I want somebody that's at least taking the time to like make a website, even a Facebook page. I would take, you know, like you just want that credit?

BARBARA

30:01 I know I'm a little weary of next door. I don't trust it at all. Now, I have given people like the name of a contractor and I did... I'm trying to think, did I actually use anybody? But it makes me nervous because there's just anybody on.

SUSAN

30:20 Anybody can say anything?

--- Tech time tracking ---

SUSAN

30:22 Yeah. And I'm also kinda hung up on the fact that BuildOps like won't let folks like go in there. And like change like the number of labor hours or change or add

parts.

BARBARA

30:33 To me, they don't have live GPS, but their GPS is probably.

SUSAN

30:38 Like yours.

BARBARA

30:38 Where you, so that's gonna be a question for the owners, whether that is okay with them. But yeah, the work order pricing, they cannot do it in the field.

SUSAN

30:53 So, okay. So let's get, really clear. So when you say work order pricing.

BARBARA

30:59 So, I'm at the job of the technician. I have a work order. It says service this elevator. It's not working. So, it says one hour right now, I'm there for two hours. So I need to be able to say, okay, two hours at this rate and make that the total.

--- Tech time tracking ends ---

BARBARA

31:17 Then maybe I used a battery. Maybe the battery is 60 dollars. I need to add the battery and give the total to the customer and collect the money.

SUSAN

31:25 Gotcha. So I think a good kind of jumping off point is I wanna show you that exact functionality in service trade to make sure that we're on the same page. So let's go ahead and I'll show.

--- Accounting integrations ---

BARBARA

31:42 Jobber.

SUSAN

31:45 Thing, what was missing with Jobber?

BARBARA

31:48 You know what? Nothing really? It's just that it made me really nervous. They had so many complaints so many that after I looked at it and said, I like this, I liked it actually, right? I don't know how...

SUSAN

32:04 To...

BARBARA

32:06 Evaluate like, you know, you can look at Salesforce and say, okay, well, they're huge.

--- Accounting integrations ends ---

BARBARA

32:12 So they're going to have more complaints, right? That does make sense because they do have, you know, a good view. It just, it made me uncomfortable, the amount of complaints. And so if you have complaints, right? We have complaints, somebody just put one in, right? Whatever that I can explain to you. Okay, here was the problem whatever because it's not that people complain. It's what you do after they complain, right? So, this guy said he knew nothing about that and he hadn't heard of it really. So that made me say, okay, you're an idiot because you, if you're in sales, right? Then you have to be able to address that.

SUSAN

32:57 Yeah. If there's a reoccurring issue that your customers experiencing. And of course, here, like the random one off people that are just like don't listen.

BARBARA

33:04 Different, right? But this was like complaint to complain about support about things not working. I mean, I can't you know, I've only been here two months. I'd like to have my job and if I'm gonna make a recommendation, it has to be. So that made me uncomfortable. So I kinda said, okay, let's put that aside. Who else should I?

SUSAN

33:29 Just...

BARBARA

33:30 Important.

SUSAN

33:30 Ones...

BARBARA

33:33 The 4,000 of them, you know, and so, and I can't really sort it out. I can't really without being in the industry. My sister's a developer. So I'm trying to get a little, but she's in a totally different area, you know, and I'm trying to figure out how to sort through the information that is out there.

SUSAN

33:56 I completely get that my feedback to you would be because you're not going to be able to say like let's say you get it down to like three places, right? I would ask for demonstrable proof whether it's a conversation with a reference or some sort of evidence to show, have you had a customer like me stay with you for more than two years?

BARBARA

34:19 And...

SUSAN

34:20 And if it's and obviously, you're not going to be like, I need to talk to a company in California that also works on elevators like can?

BARBARA

34:28 Of course.

SUSAN

34:29 Not prescriptive, but like, you know, folks that, you know, are doing the mix of work that you're doing generally, you know, just have a conversation with somebody that's been with them for long because the last thing you wanna do and I know that this is a concern for you as it is for anybody else is go with the tool and then have to switch again one to two years.

--- Tech On-site ---

BARBARA

34:47 Done that, right?

SUSAN

34:49 Yeah, yeah. But so this is the mobile app. So this is, the technician experience. And of course, you know, I'm happy to show you the office view as well. You know, they can tap on directions. I'll open up, their native map app so they can head over there, the GPS and clock events we have in route onsite and job prep, the.

--- Dispatch ---

BARBARA

35:15 At, this is, I open my app for the day. This is what I see.

SUSAN

35:19 This is when you open it for the day... let me do this. This is, they would see the list of all their appointments for that day.

BARBARA

35:27 All right. So this is everywhere I have to go today. Okay? Got it.

--- Tech On-site ---

SUSAN

35:32 So that... that's everything that I, you know, the jobs are already set up and we'll head over to this appointment at night Dale. Okay? So we click on that, you know, we can get directions and the cool thing that you can do with the, in route clock in event as you can clock in this. And as I mentioned, it's taking a time and a GPS stamp, but we can click notify customer and, you know.

BARBARA

35:59 Right.

SUSAN

36:01 Let them know we're on the way, it's a nice intro because it's going to send the technician headshot as well as the...

BARBARA

36:07 And one of them, yeah.

--- Tech time tracking ---

SUSAN

36:09 Yeah. And then they can choose the time... then we can clock out of that and then clock in as being on site... but the...

BARBARA

36:21 Block out on your travel.

SUSAN

36:26 Okay.

SUSAN

36:32 And, they basically, you know, there's a lot of other features that we can dig into, but I wanna show like what it looks like towards the end when you, when they want to.

--- Accounting ---

BARBARA

36:40 Yeah. Okay.

SUSAN

36:41 Generate an invoice with pricing. So then we go down here and click generate invoice. And then this is where they have all the options to change this. So we.

BARBARA

36:57 Before you go any further. So I see you have sales tax call has a different tax for every single city and there's a lot of cities. How can we build those into the system?

--- Pricing ---

SUSAN

37:10 Is it based on, is it based on zip code?

BARBARA

37:16 I'm guessing, yes, because the way it works is like, so I'm in almonti, so maybe almonti has a nine percent tax, but then the county has a nine point five. So now it becomes nine point five. So we have this huge tax table with every city and we need to be able to have that in there so that when this guys at this call, it'll bring out the right tax, like you see how it says rally seven point two five?

--- Accounting ---

SUSAN

37:43 Yeah. So this is all done by the, so you can have the full zip code in the back end and say, if zip code is X, charge X percent, and I'll do that automatically.

BARBARA

37:55 And how does that get in the system?

SUSAN

37:58 If it's not, if it's not the default rate. So if you need to like, you need to do that thing where you have the city tax and a county tax.

BARBARA

38:05 Well, it's combined into one for the city, you know, call it one. But it's that's how you calculate it.

SUSAN

38:12 Gotcha. Yeah. So that it's going to be whatever the default is for the city. And if you, if that's not displaying correctly, like if there is like the additional county city tax whatever, then in the back end of service trade, you can go in and update that.

BARBARA

38:28 No. But what I mean is how does it get in there?

SUSAN

38:32 Like how does it know?

BARBARA

38:33 Yeah.

SUSAN

38:35 So, it's based on that. So this location is in, I want to keep working.

BARBARA

38:42 Right.

SUSAN

38:44 So it knows the default?

BARBARA

38:47 Yeah. Where is getting the tax rate?

SUSAN

38:50 We have that in the back end automatically, and then you can change that if need be.

BARBARA

38:56 No, I hear what you're saying but you're gonna have every city in California on the back end. Is that what you're saying? Yeah, automatically. I don't have you have it in there. So if you look up... Carmel by the C, you have the tax, right?

SUSAN

39:17 Yeah. If I create a job for this zip code, the system has that.

SUSAN

39:26 I'm not sure what database we're pulling that from.

--- Accounting ends ---

BARBARA

39:29 Right. Because that's important only so that we know it would be, right?

SUSAN

39:33 Yeah.

BARBARA

39:34 Because it changes. So we need to know that it would be correct?

SUSAN

39:38 Yeah. So I think the thing would be to do is like... yeah, like it can certainly be changed, but definitely doing that kind of like level of qa and that discussion with account manager that kind of stuff.

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

SUSAN

39:54 Yeah. So, you know, this is where we have our options. So, the other piece of this is we have the ability to do pricing contracts. So the, they really should be, you know, like basically pricing structures, you can have multiple ones for different types of customers. And that basically just sets the rules for the margins, you know, things like.

BARBARA

40:18 Less.

SUSAN

40:18 Than 100 bucks charge this percent.

BARBARA

40:21 Okay. Sorry, interrupt, like there's a special hourly rate for people who are covered under service contracts. Is that kind of like what you mean?

SUSAN

40:31 It, it affects the margin. So, so say, for instance, one type of customer type a of customer, they get their labor marked up by 30 percent. But then a different kind of customer. Let's say that like exists under a planned maintenance agreement, they only get their labor marked up by 15 percent.

BARBARA

40:51 But what if we want just a flat amount, we don't want it to with the markup... in other words, I'm charging you 495 dollars an hour that's what I want in.

--- *Quote templates* ---

SUSAN

41:03 But, you can create that same role.

BARBARA

41:06 Got it. All right?

SUSAN

41:10 And then you have the option to say, like how detailed do you want this to be? So like right now, it's set to line items, prices, but you could change that to grand

total. And then we go into these invoice items. So it's gonna display that... and then they can change the price on that from there?

--- Quote templates ends ---

BARBARA

41:36 How would they add something if they use something?

SUSAN

41:39 So if they need to add something that would be before the invoice creation... but... well, let me back out of this. Probably the easiest thing. So if they wanted to add a part or just... the volume of something. So, let's say... for this one, we're using three hours, but actually they want to change this to four, they just go in that and click save.

--- Quote templates ---

SUSAN

42:10 And now it's going to invoice for four hours. If they want to add a new item, this is the list that you guys have. You can bulk upload it through CSV files with just a name, a description and a cost on there. So they can pull from this without having to key anything extra in or if it's something brand new, they can manually add it. So we can click this plus button. They can key in this information and they can indicate this is sometimes helpful for reporting where they got it from.

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

SUSAN

42:42 If they got it from truck stock or if it's something that they need to get from a vendor, they can indicate, is this something they got? Is this something they ordered, but haven't received or is this something they need someone else to order? And this is going to come back to the office with the work order as well and be reportable and aggregate. So you can keep up with all of that?

--- Tech On-site ---

BARBARA

43:00 Okay.

SUSAN

43:05 So that's how you would add additional things on there prior to the invoice creation process, right? And then if they needed to get a work acknowledgment, like just get a signature but not actually send the invoice. They can do that as well by going through the create work acknowledgement feature.

--- Tech On-site ends ---

BARBARA

43:26 Right. Like for planned maintenance.

SUSAN

43:28 Exactly. So, I just want you to sign off and say that I did this. You can do that, walkthrough all these various components with them. I'll save a good chunk of time.

BARBARA

43:42 Right, okay.

SUSAN

43:44 Will do that.

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

SUSAN

43:52 So that's how we would do that. And then we'll go back to, the invoice screen so, we talk through all of those pieces and they can add new notes if they want to there. And then they're going to finalize the invoice.

SUSAN

44:10 Then view it.

SUSAN

44:15 And there from there, they can send it to the customer.

BARBARA

44:20 This is you doing it that I'm getting all these, okay?

SUSAN

44:26 What are all these emails?

BARBARA

44:30 Okay.

SUSAN

44:32 But yeah. So they can review all that click, send invoice. My one is Susan warm, it's me... and then you send.

BARBARA

44:44 Thing before this, right before the meeting, that was like for doughnuts and I'm like, you know, what is it about doughnuts today?

--- Invoicing ---

BARBARA

44:51 But now I realized it was you saying it, which is why I got it. Okay. So it's just gonna e-mail it to the customer. We can also just show it to them.

SUSAN

45:03 You could just show it to them. Yeah, but in terms of, like we talked about the whole collecting payment thing if they wanted to key in, they run it through our payment process or they can do that or do it however you like, right?

--- Customer engagement ---

SUSAN

45:18 Okay. So that's that, and then the other piece, like while we're in the mobile app that folks find the sort of a stand out feature is our ability to find quoting opportunities while folks are on those existing visits, especially those planned maintenance visits. So that's really easy for the tech to do.

--- Deficiencies ---

SUSAN

45:40 So they can go in if they want, they find an issue. They can just go over to deficiencies and then click on add deficiency. And, you know, key in a description, say there's a broken compressor. They can attach photos, videos, etcetera. We're saying like my microphone is our broken compressor... wanna keep. We wanna say that this is inoperable. And then I wanna keep it nice and organized. So we'll tie it back to this asset.

SUSAN

46:23 And this is a new issue. If they want to, they can add a proposed solution.

BARBARA

46:29 In which case, when we come back to you on this look at that, we can then prepare a quote.

--- Access to information ---

SUSAN

46:37 Exactly. So that that's the very next thing I wanted to show you is what that looks like and just generally what the work order looks like in the office view.

BARBARA

46:45 Okay. No.

SUSAN

46:47 So first off, while we're here, this is a work order in the office view of service trade.

--- *Recurring maintenance* ---

SUSAN

46:55 So you mentioned, you know, with the commercial jobs like the ability to have things organized where basically all work is performed on assets that live at locations that are part of companies for residential, you would have to do the company and the location to match. But there's no way for information to get.

BARBARA

47:15 Company, if it's residential.

SUSAN

47:17 You'd have to have both, you'd have to key in both location and company. It takes an extra 10 ish seconds per, for a customer setup.

BARBARA

47:25 So, let's now, look, I have a contract for the la school district. What that means is you've got the district within the district. There are three regions within each region. There's multiple buildings within each building. There's multiple products. How can you handle that?

SUSAN

47:48 So, my first inclination in terms of keeping that organized is, so your asset is going to be that particular piece of equipment that you're working on. So let's...

--- *Assets* ---

BARBARA

48:02 Piece of...

SUSAN

48:04 Single piece of equipment. And let's say that elevator then lives. And then this would be, the physical location. So that particular building and that building's address that they need to go to.

BARBARA

48:20 Okay.

SUSAN

48:21 And then the company name would be basically, you know, the billing contact for lack of a better phrase.

--- *Recurring maintenance* ---

SUSAN

48:30 So that main head district. But if you need to organize contacts, you can easily do that because I can go over here to contacts that's gonna show me everything here. And I can then put in like if there's a district one contact, blah, blah, blah, I can put that all in there. Also on, the location name, I could put in parentheses, you know, blah, blah, blah, building district two.

BARBARA

48:58 And then the equipment goes below that, yes. Okay.

SUSAN

49:05 Would that work for you all?

BARBARA

49:08 Probably.

SUSAN

49:10 Yeah. So that's how we have it organized on these work orders. You can have multiple services on multiple assets. You can have multiple technicians on there. The, the thing I want to emphasize especially when it comes to plan maintenance is just how easy it is to keep up with that and keep those from falling through the cracks. So say, for instance, you have an agreement where they say we want somebody to come out there on the fourth Tuesday of every month at three PM. You could set up the service that way and it's automatically going to create that job. If you have a preferred definition, I'll automatically put on their schedule.

--- *Dispatch* ---

SUSAN

49:48 You don't have to schedule that out. But if they've given you more flexibility to say, I don't care when you do it, just get it done quarterly. And so, you can like this, you can schedule it throughout the whole month. You can set up that way and then use our map based scheduler to figure out when we can do that and on what technician.

BARBARA

50:07 And then I see you add the service to this appointment and the new point. Okay. Got it. So, if you have an existing appointment already, you can add an additional service to it that's what that is.

SUSAN

50:19 Precisely. So, if you're already going out there and they're like, hey, while you're out there, can you also do this?

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

SUSAN

50:23 There you go. So those are, our job items, that we have that we saw before we're still clocked in over there. So you can still see those clock events. It'll give you a warning. If someone says they try to clock in... a further away than they actually should have been... you've got, you can dig into asset history that's another piece that's really nice for the technicians.

--- *Assets* ---

SUSAN

50:51 They have that same access and the mobile app where they can dig in for any asset that's at the location that they've either been to where they're called to. They can see full service history, any previous deficiencies, any manuals, files, folders, et cetera.

--- *Deficiencies* ---

SUSAN

51:10 It's all gonna be right there. But digging into this... deficiency refresh. So that form that I just filled out that's gonna trigger an e-mail in service trade saying, hey, so, and so technician found an issue. So that e-mail will then take you to this page. This page. You can just review this. You can see that they've got an attachment come through and we can easily just add this to a quote.

--- *Quote templates* ---

SUSAN

51:46 And if you want to create it from scratch, if it's something you've never done before, probably won't do it again. You can manually add in a description with tables bullets et cetera. And then you can manually add in parts and labor. But let's say, you know, this broken compressor, replacing that, something that we do pretty often. You would then be able to build out a quote template and save a good chunk of time with that. So I'm gonna pull up and this is something you would create because definitely don't want software engineers, right? In this, you would pull up this description and then the commonly used parts and labor, add that in and then you can go in and...

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

BARBARA

52:24 Manually. So you can manually change the prices. OSHA, that price will not, I need to change it.

SUSAN

52:30 Exactly.

BARBARA

52:31 Okay.

SUSAN

52:32 So, we can go down here and these we've got our pricing rules in here. But for whatever reason for just this one off, you're like actually wanna charge them 95 each for this.

--- *Quote templates* ---

SUSAN

52:43 You can manually do that. And then you can change the way that this gets displayed to the customer. So this was set to grand total only. But I want to show them line items with prices.

BARBARA

52:55 Right.

SUSAN

52:56 You can see that picture and then we're just going to send this to the customer.

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

SUSAN

53:04 You can require a po for approval if you want or it's not required. Let me just show you what a quote looks like in service trade. So, this is the quote. It's got your brand front and center, the description, the parts and labor, the way that you want it. And then perhaps, most importantly, these pictures and videos etcetera that are gonna show the severity of the issue. If they want to approve it, they can just click that big green approve button.

BARBARA

53:32 And then they can sign it or how does that work?

SUSAN

53:35 So, when they click approve, they do the digital signature and, they toggle on the TS and CS. So it's finding.

--- *Invoicing* ---

BARBARA

53:44 Got it. And then the credit card, we can figure out how to do that part because we take credit card deposits.

SUSAN

53:51 Yeah, that would be something you have to do totally separate from service trade.

BARBARA

53:56 Okay.

SUSAN

53:57 Yeah. The only way to.

BARBARA

54:03 I, you know.

SUSAN

54:05 I was like, I can't figure out... but yeah, once that gets approved though, there's a good chunk of time savings here.

--- Quoting ---

SUSAN

54:16 So, I'll just manually approve this. So, let's say they approve this. They want this gone ahead and done. Let's say they've paid their deposit and you've like added a tag saying they've paid the deposit and you're ready to turn this into a job that actually gets worked. You can add it to an existing one or you can create one.

--- Recurring maintenance ---

BARBARA

54:34 But it's the new customer, right?

SUSAN

54:38 A job is a new work order.

BARBARA

54:41 Job is a new work order. So, what's the customers like account called?

SUSAN

54:48 We...

BARBARA

54:53 Store all our customers, their locations. They are details, all that, what do you call that?

SUSAN

55:00 So that would either live on the location page or you can get to the correct location page from the company page and all that.

BARBARA

55:07 Company. And then what are you calling? The product? Is your asset that's what you're calling?

SUSAN

55:14 Exactly. And I think showing you this will probably be a good way to kinda show that organization. So this is the location page for the night Dale crispy cream. When I go to the company page, it's just gonna give me a list of, the locations. So if somebody's got a question, they're like, okay, I've got a question about, so work that was done at. So and so location at this place, I can go in there and select the location. Of course, you can text search for like night Dale, and that would pop up.

--- Quoting ---

SUSAN

55:43 But here's really your central hub in service rate will have all your services, previous jobs, all the equipment there, so on and so forth.

BARBARA

55:52 Okay. Got it.

SUSAN

55:55 Yeah. But yeah. So from there, from this quote, once it gets approved, you can just really easily add it to, a new work order or add it to an existing work order.

--- Invoicing ---

SUSAN

56:09 In this case, we'll do a brand new one... and that's gonna carry everything over. So that way all you have to do is schedule it.

BARBARA

56:22 Got it. Okay.

SUSAN

56:27 Yeah.

BARBARA

56:28 I can going on the work quarter like, so you have the total on there, which is good, but I need to reflect that a deposits been paid as well to show the accurate balance. Can I change that on here?

--- Quoting ---

SUSAN

56:40 Yeah. So that's why I definitely recommend tags for, so I would recommend having like on the quote, right? Once it, once it gets approved or it, it's entirely up to you because I'm thinking, yeah, if it gets approved, but you're waiting on the deposit. As soon as I create this job, I would go in here and add the tag waiting for deposit.

--- Dispatch ---

SUSAN

57:03 And then once you receive the deposit, you change that over and then you'd be able to schedule that, and then you can run reports based on tags.

BARBARA

57:10 Got it. Okay. Got it.

SUSAN

57:15 But, yeah. So... that's that and then just really quickly to show, you know, we've got a basic dispatch board which I think literally almost every digital work order tool has where you can see what's on schedule and then be able to add a job from there. So that's pretty standard for.

BARBARA

57:34 Drag and drop them.

SUSAN

57:36 Exactly. Yeah. And this is what we really recommend for. The more my gosh, I need somebody out there today, tomorrow, the next day, can we throw something on the calendar for that?

BARBARA

57:46 We can do, but yeah.

SUSAN

57:50 Gotcha. Yeah. You mentioned that like even for if it's for like some sort of repair, it's like we got to think about this later on. So probably wouldn't be using that a ton. I think you're you'd probably be living more on our map base scheduler. So this is going to display all of the jobs for whatever time block that you want. So right now, it's showing everything that, that's due in the month of August, the way that this is

set up. So anything with a color and a calendar inside of it means that it's been assigned to a technician, and it has an appointment. So that is on their schedule. So this is, you know, this is already, you know, on their schedule basically. But the way most folks do it when they do their, you know, scheduling for that week, that month, however often they wanna do it is we can kinda Zoom way out. Let's see all of our options here. See if I can find. There we go here's, a nice unscheduled job here outside of San Jose. So see how this one is plain and empty and gray. That means that there's no tech assigned to it and there's no appointment for it, but we can.

BARBARA

59:07 There's no.

SUSAN

59:09 Yeah. We just know that it's due between July 20 fourth and the end of August. So if we wanted to throw that on the schedule, we would say, okay, I want sea grab this guy, want osela to work this and then I want her to do that on Saturday the fifth and then you can adjust the timing from there.

--- Quoting ---

BARBARA

59:33 Good.

SUSAN

59:35 And then I definitely want to show what it looks like to log in for the day from the office view. Just all the different categories that we have here also want to point out from the screen. Is there's a good amount of reports that can be run in terms of outstanding quotes, outstanding invoices.

--- Tech time tracking ---

SUSAN

59:52 We talked about, the jobs with various parts statuses. You can run reports on those tags. We even have a screen that's like a tech scorecard. They'll show you your most profitable technician and how much time they're spending for whatever time block in various job categories, all that. But here you've got your daily schedule.

--- Dispatch ---

SUSAN

1:00:12 You can see where techs are based on their most recent lot event. We've got overdue jobs without appointment. So if there's anything in there, we wanna take action on that right away. Same theme with jobs with out appointments that are due in the next two weeks. And then past jobs to be marked complete. So this is the tech has done all none, some of the work but the office needs to go through and figure out, hey, is this complete and can we get off the schedule or were they missing a part? Was there an emergency? Do we need to reschedule it? And, and that down

here, we've got jobs that have been marked complete by both the office and the tech, but an invoice hasn't been sent for that.

BARBARA

1:00:56 Which we don't really send.

SUSAN

1:00:57 As soon as I started on that, but I was like which you will need?

BARBARA

1:01:01 Maybe it would more be, I don't know anyway. I'm not worrying about that, okay?

--- Purchase decision ---

SUSAN

1:01:07 Exactly. But yeah, you know, that's kinda the grand tour. Obviously, I didn't show you every little tiny thing that's kinda the highlights we'd love to know your overall thoughts.

BARBARA

1:01:19 I mean, let's just say it looks like it could work. I think it's a benefit that one of the owners knows someone who is using it. So that's good, try to think it's gonna be up to them how important that live tracking literally seeing them because some of the packages have some of them don't so I think that's gonna be a thing. They're gonna have to decide how much that matters... an, but overall, it pretty much looks like it could do the job.

--- Type of work ---

BARBARA

1:01:56 Let's put it like that. That's my thoughts. Like I said, when we're talking about the comparison... this seems pretty simple. And... I thought house call flow. How do you compare yourself like to that company?

SUSAN

1:02:18 If you tell me, Susan, I've got a business where we only go to people's houses and do really reactive repair work like handyman stuff.

BARBARA

1:02:29 Right.

SUSAN

1:02:30 How's Cal pro all day?

BARBARA

1:02:32 Okay. Because it's a little, maybe a little too basic or?

SUSAN

1:02:36 Well, in the big, so there's house call pro job or ServiceFusion. And I put those in those buckets of like that same kind of work. Because the fact that, you know, you mentioned there's probably a decent chance that about 50 percent of your jobs are those planned maintenance.

--- Type of work ends ---

SUSAN

1:02:49 And then the other piece of it is you're not really doing the like my gosh, can you get over here tomorrow things you're planning so much stuff out there's? Just not that functionality baked into tools.

BARBARA

1:03:00 Okay.

SUSAN

1:03:01 So, that would be my concern.

BARBARA

1:03:05 Would you compare yourself to?

SUSAN

1:03:08 In terms of comparisons, I would say our biggest competitors overall... recently in this space, I would say BuildOps service tighten and ServiceFusion. And then Simpro.

BARBARA

1:03:31 A Simpro. I didn't look at it, but I saw the name. So you don't consider yourself in line with like a Salesforce field service.

SUSAN

1:03:41 So, I have very complex feelings about Salesforce because I have to use it every day and it drives me insane. I feel like if Salesforce is the right tool frankly for like my organization because like it's a sales tool, you know, like it's really designed to like keep track of contracts and agreements and, the field service add on that they've added on is such an afterthought from what I've seen, it would just make me feel very nervous. And the other problem with Salesforce is that like they may, they put together this very basic field service add on. But anytime you're like wait here's, this like thing that feels like it should come with this, like that will cost them agillion dollars for our people to.

BARBARA

1:04:29 Expensive. Yeah. Okay.

--- *Type of work* ---

SUSAN

1:04:33 Yeah... but yeah. And, and, the other piece of it is like when you look at that because I wanna do full transparency is, you know, when you look at service trade, you know, on our website, like we are geared more towards commercial. So, you know, the pieces that, we talked about, you know, with having, you know, for those residual folks, you know, you would have to key in... you know, the location and the customer.

--- *Quote templates* ---

SUSAN

1:05:01 The other thing I was gonna ask, do you guys ever need to do like what's typically known as like flat rate pricing or is like, the parts and labor, the way that we have displayed, would that be sufficient?

BARBARA

1:05:12 No, it's fine.

--- *Quote templates ends* ---

BARBARA

1:05:13 The way we always do. I mean, unless, if we're going to, for just service and we only do service, but it's still hourly. It's not flat rate, you know? So I had a question. Now I lost it. Okay. So you don't like Salesforce, you don't like that piece? Yeah. Okay. And... I forget why I think the reason that I didn't look at ServiceFusion. I think the reason that it's the one I'm thinking of is there was so many complaints that really just, I forget.

SUSAN

1:05:51 They, I'm being weird in like defending competition, but like they've improved all. I feel like they've kind of improved a little bit recently... just generally from what I'm hearing. But again...

BARBARA

1:06:07 I thought I saw something that said the opposite that setting to be. I don't know service tighten. I can't remember why I didn't look at that. But anyway... this is interesting. And I mean, truthfully a number of the products that we've looked at could work because like even household pro, it may be over simplified if we're talking about scaling and growing. So maybe it's not the best for that, but it would do the job for now. The question, is that what we want and right? Exactly?

SUSAN

1:06:42 Yeah. And I know we've beat this like a dead horse, but I just want to get super clear. Like in terms of the way that you guys are collecting payment... is that, you know, just kinda give me the high level, walk me through how you're getting paid.

--- Invoicing ---

BARBARA

1:07:02 Okay. You call us. So we, well, we have multiple things. Okay. The maintenance agreements obviously being a, okay, they send their payment, they give a credit card, whatever way.

SUSAN

1:07:14 And just real quick with that, like when someone calls you up and says, I want to do this plan maintenance agreement and run my card for 2000 dollars or whatever, what tool are you using to process that payment?

BARBARA

1:07:28 I guess we use Quickbooks right? Gen for credit card processing, but we are sending an agreement. We're getting a signature and then we're processing or credit card.

SUSAN

1:07:38 Okay.

BARBARA

1:07:39 Okay. So that's one, then you have what we talked about, which is like the repair quotes, right? So that's something. Again, it's more similar in that I send it to you in paperwork, you need to sign it. And then again, we process a credit card... and then the third and most.

SUSAN

1:08:01 Calling you on the phone with their credit card information for those.

BARBARA

1:08:05 We're typically either doing like a credit card authorization form. So when we go to your house, so here's, the other piece you called us for service, we don't know, we tell you what the hourly rate is, whatever confirm it in an e-mail and we go out to service it, right? We, we do require a credit card authorization form in advance so that we are guaranteed our paying.

SUSAN

1:08:31 Gotcha. Okay. So you're getting that, that's like being put into your Quickbooks in advance and then once that gets approved, then you guys go.

BARBARA

1:08:39 I mean, I don't know if it goes around Quickbooks because I'm not doing that is, but what?

SUSAN

1:08:43 Whatever that software is?

BARBARA

1:08:44 Yeah. So we are keeping that credit card on file.

--- Invoicing ends ---

BARBARA

1:08:48 And so after the service, when the technician goes to the customer and it says, okay, it's however much money, either the test, they have white birds, they can do it or they call in the office to do it one or the other.

SUSAN

1:09:01 Gotcha. Okay. That definitely makes sense. I just wanted to get, really clear. So I was like, wait a minute.

--- Invoicing ---

BARBARA

1:09:07 That's the biggest most important piece because it's to take a credit card from anyone. But the biggest piece is that we have to be able to collect in the field because really, we don't have receivables really, you know, except for like our contracts and that kind of thing. But we every single day and we collect every single day.

SUSAN

1:09:27 Yeah. As long as the understanding is that there's no software based connection between your card reader and service trade and you're comfortable with that, that's all it matters.

BARBARA

1:09:38 We do have the ability to process them through service trades, credit card process.

SUSAN

1:09:43 Yes. And that would be the process of them being emailed the invoice.

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

SUSAN

1:09:48 And then, so if we're standing here, we're I'm the technician, you're the customer and you said this is great. You know, send me the invoice. So you e-mail the invoice from the field like you just saw, and then you open up the invoice. There's a big green pay now button, they go on, you would go on your device, click that big green pay button and they can put in their credit card information.

--- Invoicing ---

SUSAN

1:10:11 And then on iOS, I believe there's like a little card scanner that can pop up and then that payment would be run through our service trade payment processor.

BARBARA

1:10:21 Charging us.

SUSAN

1:10:23 Yeah, is the standard payment process or fees. It's like, I think.

BARBARA

1:10:29 Talk to me about the price of this software.

--- Invoicing ends ---

SUSAN

1:11:33 Yes. Let's let's discuss that. So the first thing is figuring out which plan would make the most sense. So let's do that.

SUSAN

1:10:49 Going on service trade pricing. So something that makes me lean towards premium for you guys is the ability to have different pricing rules for different types of customers.

--- Recurring maintenance ---

SUSAN

1:11:07 But also, you have to have that. Okay. And the nice bonus piece with this is you can also use that to track the success of individual plan maintenance agreement. So you can set up a contract for this plan maintenance agreement as an individual or group a type of plan maintenance agreements.

--- Pricing ---

SUSAN

1:11:26 And then you can see on that page, the margin percentage and how much revenue has been collected on that, and see how well you're tracking to.

BARBARA

1:11:36 So 139 dollars per month per tech, which is actually really high. But what about the office users?

SUSAN

1:11:46 Office users come with it for free. You can have two or 12 entirely up to you. So in this case, like look as you're kinda going back and forth like, if you had to guess like what you would...

BARBARA

1:11:57 I guess it'll be something like six and six, that would be my guess.

SUSAN

1:12:01 So six technicians.

BARBARA

1:12:03 Yeah, that's my guess.

SUSAN

1:12:05 Gotcha. So to get an idea about that, so all of our plans automatically come with five. So I'll change that. So for our premium plan, it would.

BARBARA

1:12:16 Five, you know, okay, fine.

SUSAN

1:12:18 Yeah. So five times 12 times one 39, gets you to 83 40. And then onboarding is 3,500, all the labor that we talked about with that, and that would take your year one to 11,840.

BARBARA

1:12:37 There's a lot of money.

SUSAN

1:12:40 You know, you could, you know, if you went down to premium, you'd have to have a single pricing contract but that just to give you a ballpark would look like this.

--- Pricing ends ---

BARBARA

1:12:52 Yeah, no, I mean, that's we're not gonna do something that's not what we need. That's just stupid. So... I had a question. So, okay. It's six months in... we're saying,

you know, Jesus is not what you said. This is not working. This is not whatever what happens tough. Let's be real.

SUSAN

1:13:19 Yeah, that's stuff yet. I'm sorry?

BARBARA

1:13:20 Okay.

SUSAN

1:13:21 Well, we will about have to qualify that and say we are going to bend over backwards to keep you. We call it charting when a customer wants to leave in the middle and like we will basically move heaven and earth to, you know, find a way to attempt to make this work. And that's why we're really careful like during this process and, you know, we protect our retention rate more than an individual sale. So that's why I'm telling, you know, the fact that like we are designed for commercial, you know, some of the workflows aren't exactly what our customers are doing. So, like if this is something that you're leaning towards, I'd really want to for lack of, you know, a non inside of sales term, you know, I'd really want to qualify this really well.

BARBARA

1:14:09 Yeah, got it. That's. Okay. I understand that. And I appreciate that, you know, you're probably little straightforward portal to because, you know, I know you're in sales like, I know it's a sales, you know, piece of this part, but, you know, the last thing you want because I'm a salesperson sorted by trade.

--- Purchase decision ---

BARBARA

1:14:30 The last person you want is someone to buy it and not be happy. So, all the others, it really seemed to me they were just so like, you know, pushy and what's your time for blah blah blah, you know, I understand you don't want people. I imagine people waste your time and do all these demos and whatever. I understand that. I'm not gonna do that. I think considering how in depth I'm going, people should know that, right?

SUSAN

1:14:57 Yeah. You're not tire kicker. I can tell you.

BARBARA

1:15:01 We are gonna do something whether this is it, I don't know, but we are absolutely going to do something. So, I appreciate the information. I appreciate how straightforward you were.

--- Purchase decision ends ---

SUSAN

1:15:13 Well, I really appreciate that. And speaking of being straightforward, I do want to give you a heads up. So I actually am doing this demo as a bit of a favor to a colleague. I actually have the western side of the country. She.

BARBARA

1:15:30 I'm in...

SUSAN

1:15:30 California. I know.

--- Purchase decision ---

SUSAN

1:15:31 So I have the east but she has the, she was on a long vacation, and I know that you wanted to go ahead and get this in a little bit sooner than later. So if you continue, she's probably just full disclosure, probably one of my best friends at the company. So I talked to her literally all the time. She's fantastic. You will be in.

--- Purchase decision ends ---

BARBARA

1:15:49 I'm not too worried, right? I haven't become attached to him yet. So it's not like a really big.

SUSAN

1:15:59 Well, very good.

BARBARA

1:16:00 With Carolina.

SUSAN

1:16:03 Yeah. I grew up the eastern part of the state and then I moved to the central part of the state for school and never left.

BARBARA

1:16:09 Yeah, I don't really know what I mean? Of course, I'm from New York, so that's where everybody moves. So, I used to be, I don't know if it still is, but that's where everybody was going now. I'm in California, but I definitely, you know, I won't stay here. So when I, once I retire and I'm trying to figure out, okay, what's my location. So I was just curious.

SUSAN

1:16:32 Yeah. I stayed for a reason, you know, it's really nice like, I mean, they're it's growing pretty rapidly, but there's just like a lot of, you know, good options, you

know, if you want to have that city experience, you can, if you want things to be a little bit more rural but still drivable to things to do. You've got options there, so.

BARBARA

1:16:53 I just think by the time I retire, it's probably gonna be too expensive, you know, because years ago it was quite affordable, I know it's still kind of affordable, but it's you know, obviously the more popular it becomes then, you know, the harder that is, I have no idea, you know, I haven't figured that out yet except that I won't stay in California.

SUSAN

1:17:16 How long have you been?

BARBARA

1:17:17 Here five years, all six, it's not my favorite place. It's very different. It's very far. So, you know, my family is all on the east coast. My friends are on the east coast and just getting there, it's a whole day by the time it's like going to Europe, you know? So I'd rather go to Europe. So, anyway, but yet I can't move back to like where there's like hardcore weather. I just can't so we'll see, I don't know.

SUSAN

1:17:46 Yeah. Well, definitely check us out. We'd love to have you, but in terms of next steps, you know, do we feel like we're at the place where, you know, you might want to throw something on your calendar?

BARBARA

1:17:59 I'm gonna probably put together information for them. I, actually because we have two locations I'm in southern California, and the main office is in north and I'll be up there next week, so I'll know more after that, so.

SUSAN

1:18:14 Okay. Well, that sounds good. I'm gonna send you an e-mail with this recording, the pricing information, onboarding, information, some helpful links. And if you have any questions in the meantime, let me know.

BARBARA

1:18:27 That was great. Nice talking to you.

SUSAN

1:18:29 Nice talking to you. Have a good weekend.

BARBARA

1:18:31 You too. Bye.

SUSAN

The End