ServiceTrade Demo with Keyes North Atlantic, Inc.

Brett Griffith with Keyes North Atlantic, Inc.
Recorded on 8/30/23 via Zoom, 1 hour 10 min.

Participants

SERVICETRADE

Brett Griffith
Territory Manager

KEYES NORTH ATLANTIC, INC.

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Director, Strategic Operation

Topics

Transcript

ANDREA

0:05 Post it and...

ANDREA

0:19 Like me, like even.

ANDREA

0:27 It is on.

ANDREA

0:45 Got you. Yeah.

BRETT

6:35 Hey, Andrea. How are you? Good. How are you? I'm good. I'm glad to see you again. I was very excited to see that e-mail on was that last Friday? Yeah, yeah, awesome. Yeah. So it sounds like you guys have been talking about this internally. Tell me about that conversation and kinda, I read your e-mail I have it pulled up as well so we can kinda reference it, but tell me why we're...

ANDREA

7:00 I think it's a little bit more learning on my part and our part, right? We have out of the two three final that we're looking at two, I think can handle the fire alarm testing. Okay enough for us a third. If that's the solution we go with, we might need to do a different solution for the fire alarm testing.

--- Accounting integrations ---

BRETT

7:21 So, let's start there. Who, who are you guys looking at? Who are the?

ANDREA

7:24 BuildOps, Simpro management agreement module. And then a software you've never heard of hot service factor, which is team.

BRETT

7:38 Yeah, you're right? I've never heard of.

ANDREA

7:40 That's right? So, they are a relatively small company. It's actually the software we're using now.

BRETT

7:45 Gotcha. Okay.

ANDREA

7:46 It's a date, right? Because we're currently on a unix server based software. And so this is their cloud version kind coming along into the next century.

BRETT

7:55 Okay. Do you want me to give you any information on those? Okay. The first one you mentioned was build up. Where does that stand on your list? Is that one two or three?

--- *Accounting integrations ends* ---

ANDREA

8:06 All neutral for us? There really all three equally running?

BRETT

8:10 Okay. So I'm not gonna talk bad about anyone, but I will warn you over the past year, BuildOps is definitely a strong competitor of service trade. They kinda, let me set the stage. Service trade has been around for about 10 years. BuildOps been around for about two and a half three years. They're trying to do the same thing that we do. And they're definitely trying to sell to a lot of our customers that said I actually just worked in opportunity. They went with BuildOps over us back in December of last year and the feedback essentially was BuildOps lie to us and they told us, they sold this paper ware stuff that didn't exist.

--- *Pricing* ---

BRETT

8:45 And actually that customer got their money back from BuildOps, 50,000 dollars and then signed it trade. So I just want to warn you, I would recommend you talk to a reference and a reference in your specific industry that has been onboarded in the last six months to a year.

--- *Paper process* ---

BRETT

9:02 So it's I'll give you there. We've just heard we've heard a lot of complaints lately and I don't want you guys to buy something that's going to make your business worse. So keep that. I don't know a ton about Simpro. I know they, they're kind of making it come back.

BRETT

9:16 They fell off for a little bit there, but they're definitely making I come back. I think of everything you mentioned... Simpro or service factors probably get, let me ask. Is this strictly for fire alarm or is this for activity?

ANDREA

9:32 Right. Again, that's why I gave you our business breakdown, right?

--- *Type of work* ---

ANDREA

9:35 I think, and just to kind of let you know for BuildOps, we actually did talk to a customer and the person has a very similar business model to ours and his residential volume is higher than ours on the VC side. So he's running that through service tighten. Okay.

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

ANDREA

9:52 Yeah, which is not. And running for us, it's too big or we don't want to spend that kind of money and they're too. I think, yeah. So... I think we're just know we're not unique, but we are somewhat unique in the type of different trades that we have. And especially if we're going to add coming into the mix eventually.

--- *Purchase decision* ---

BRETT

10:13 Exactly. I would agree with that. You're you're a little different than some of the people I talked to but not crazy.

ANDREA

10:17 Not totally. But just enough. And so I'm trying to understand a return on investment cost, how much of our business is the pier alarm business? How much of it is it worth us? You know, pricing ourselves or anything we do will be better than what we're doing now.

--- *Accounting integrations* ---

BRETT

10:34 That's fair.

ANDREA

10:35 Right.

BRETT

10:35 So...

ANDREA

10:36 The, you know, I've been over the last couple of months continuing to gather the pain points like what are our biggest pain points? And, you know, a lot of it is just literally not having access to the right information at the right time because it's not cloud based. So anybody will solve for that.

--- Type of work ---

BRETT

10:55 You are exactly right.

ANDREA

10:57 So that being said, the logic for us to continue to evaluate, we sort of took yourself. I mean, my notes from our call was because we do so much residential. You said we're probably not a good fit for you on.

BRETT

11:12 We're a fit for you. Yeah, we're a fit for your alarm electrical division. We're not a fit for your H division.

--- Forms ---

ANDREA

11:19 Right. Exactly. And what that's, what she said is like, well, then let's at least look at it. But then what I fail to understand is if you're a fit for alarm electrical. So form links, we saw her demo is great demo, we integrate with form links. Why would I go with... what we don't like about form links?

--- Forms ends ---

ANDREA

11:48 Is it doesn't integrate with our scheduling at all kinds of, right? So it seems to live out on its own. And then we still are going to have to figure out the getting the right calls onto the board.

BRETT

11:57 Gotcha. So basically... the suite of products between service trade, form link, form links, your inspection software, service trade, you total service management software, essentially service.

--- Accounting integrations ---

ANDREA

12:11 Say those two things one more time.

BRETT

12:13 Service or excuse me, form link is your inspection software, whereas service trade is your total service management software.

ANDREA

12:22 Got it.

--- *Type of work* ---

ANDREA

12:22 That's what I needed. And as I'm new to all of this, right? I consider build up Simpro service. So field management software, right? So you fall into that field management software realm. There are some that specialize on certain trades. And I feel like I've whittled my way through all of you.

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

BRETT

12:38 Exactly.

ANDREA

12:40 Ones that can handle all systems.

BRETT

12:44 Exactly in your form link rep. When you did that demo, did they mention? Did they mentioned getting acquired recently? Yep. Okay. They recently got acquired by InspectPoint, which another inspection software?

ANDREA

12:55 And I saw that their website says we now are blah blah blah integrated or whatever they're calling. I think we're less. I think if you think of us as the customer to you or just as a person searching, we're going from time warp of 1990, which is great to today, right? We're not like baby stepping into anything we're going from. And this company has run really effectively efficiently, has built all the processes around the limitations of the current software, has built their own access database, has built their own PDF. Has, you know, the systems all web themselves together. And so anything again will be better than nothing. And then, the question thanks to your call became, do you go with an all in one? And I read a lot of articles on your site or do we consider one suite of our business going one way and the other and the other? And said, well, let's look at that. Let's look at what the cost is. And I'm having a hard time because I'm completely new to this industry. I don't know anything about how we compare in size to your typical customer. I have no idea if we're small, meeting large, if we're tiny, if we're I have no idea.

<div align="center">BRETT</div>

14:15 If this gives you some information, so, my role is I'm the inside territory manager for the mid market team. So I think you guys are middle of the pack company for side. Some of our larger customers run up to 300 technicians on the road. Some of our smaller customers run three or four.

<div align="center">ANDREA</div>

14:31 So when people define you, they define you by the technicians on the road, not so much on the office staff supporting.

<div align="center">BRETT</div>

14:39 I would say yes to that. And the main reason is because this industry typically cost wise charges by the amount of technicians you're running.

<div align="center">ANDREA</div>

14:47 Sure.

<div align="center">BRETT</div>

14:47 They're they're the ones that are making the revenue and the field. If they don't do the jobs, you guys don't have anything to do in the office, how this industry prices things out, and how we identify companies.

<div align="center">ANDREA</div>

14:58 It market is considered, what to what sort of issue?

<div align="center">BRETT</div>

15:02 Well, I'm a little different from most people on my team. I work companies from 10 technicians to probably 40 technicians, but it's normally between like 10 and 25.

<div align="center">--- *Type of work* ---</div>

<div align="center">ANDREA</div>

15:14 So, the reason I'm asking that is I'm now trying to put my hat on to see where we fall, just an alarm electrical, right? Because I think... we are at the 10 technicians just on the hvac, we're more like the 15 technicians on the hvac service side of things. So, I think we're sort of 20 on both ends. And I think we say about 20 on the hvac service and install, and then about 25 on the alarm electrical.

<div align="center">BRETT</div>

15:46 And as far as the alarm electrical, a lot of times with alarm guys, there's helpers, there's, apprentices, is it, is that, what would you say the breakdown lead to?

<div align="center">--- *Type of work ends* ---</div>

<div align="center">ANDREA</div>

15:56 Yeah, I actually did all of those.

ANDREA

16:03 Somewhere?

ANDREA

16:14 Is...

ANDREA

16:21 So the alarm electrical?

ANDREA

16:31 Two sales people, three dispatchers, so, I know that's irrelevant to technically, but that's a now and then apprentices.

ANDREA

16:50 Four apprentices, four, four to.

--- *Pricing* ---

ANDREA

17:18 18. So for apprentices, 18 tack license. So, like, right?

BRETT

17:25 Gotcha. Okay. So, yeah, I'd say you're a larger middle of that company.

ANDREA

17:32 Okay. And, and that's about what I would have expected just based on what I've heard internally on the management team saying we're sort of we're too small. So, you know, sort of absorb these costs without blinking and in, we're too big to not do it. So.

--- *Pricing ends* ---

BRETT

17:52 Exactly. And you can't really grow without making a change that whole, you got to spend money to make money thing. And I'll touch on what you said earlier as far as you guys are making a huge jump with this. Unfortunately, I know you're new to this industry, but this industry.

--- *Paper process* ---

ANDREA

18:07 It's also not cost us anything, right?

BRETT

18:09 Yeah. This industry everyone's in your shoes like selling service trade. I'll tell you it's very difficult because I am speaking to people that are still in the nineteenth century. It's getting people to adopt the full blown software program when they maybe they run on paper or excel sheets access database like you're saying, it's difficult changing people's minds, and it is a big step for your business.

--- Forms ---

BRETT

18:30 So, I understand. And I appreciate the due dates that you're taking to look at all the different aspects of it... absolutely. And so I also want to say one other thing. So you looked at form link... I'm working another deal, that uses form links. Currently, they're trying to get away from it. That's why I know so much about it. Is it the physical, you know, conditional logic aspect of the forms that you guys require or is it just something to fill out?

ANDREA

18:57 It's just something to, I will say I've gone from and that's exactly it. I'm like why I think these other solutions, all three of them would serve us well enough in our fire alarm industry module, how we do our testing is just having a PDF that I can do pass fail on a mobile app and build that form builder. You know, that software is available for anybody really if we wanted to build it.

BRETT

19:24 Exactly. That's how it works in service trade.

ANDREA

19:25 Exactly. So that's all I need. I don't think I need a logic. I love it's great. The logic that says you're about to Inspect a sprinkler. And here are the four things that you need to look at and record versus your now gonna do so. And here are, you know, the two things that I now need like those different drop Downs. Okay. Nice, not necessarily. When I heard my guys take a look at form link, I had them on the call with me. It's basically down to not our 10, not having too many things in their hands, right?

--- Access to information ---

ANDREA

19:57 So they have a clipboard right now, it's on paper. It's clipboard to paper. They have their mobile device to try and find a location. And then they have to, you know, some manage the iPad, the phone, maybe an iPad only or, but everything right now is on paper for us.

--- Paper process ---

ANDREA

20:13 So the report is done on paper and comes back to the office and manually see the person behind me. And those physically enter all of that into our access database.

BRETT

20:24 Gotcha. Okay. Yeah, that's a pretty standard process. Okay? Like you said, the goal there is to get everything for lack of better terms.

--- Access to information ---

BRETT

20:35 All in one. For the technician really centralize the information. It doesn't make sense for the tech to have the paper, the click board, the mobile device too. If he has the mobile device, you can send him anything from anywhere and he doesn't have to carry a bunch of things around and that's the whole idea of getting off paper.

--- Access to information ends ---

ANDREA

20:50 And then, yeah, the last piece I think that I keep hearing is scheduling the zoning. So we use zoning, you use the word zone? Not necessarily so much location as we use it for the month that, we can flip it, right? We use it. All these systems are in zone one, which is January.

--- Paper process ---

ANDREA

21:09 So then when the report prints, it pulls automatically. All of the, all of the things that need to be done in January. It's printed on paper. I look through our massive calendar schedules them all emails. It sends, the letters, gives the technicians physically a stack of paper here's. You know, here's today's, calls basically.

--- Purchase decision ---

BRETT

21:31 Yeah. I know. I didn't show you service trade last time, but everything you're telling me, yeah, I know, I kinda jumped the gun on that when I thought about it, but I didn't want to waste your time either. If you guys were dead set on looking for an all in one solution.

--- Access to information ---

BRETT

21:44 Hey, by all means that said, I mean, as far as the show me what jobs are upcoming, I can do that. The mobile app giving the technician, you know, what

they're doing for the day, allow them to take pictures, allow them to track their parts, allow them to do their.

--- Access to information ends ---

ANDREA

21:59 I said inventory, do?

BRETT

22:01 Even, I think the big thing was ServiceTrade. I know the big thing was service trade is pull-through efficiency and it's really big on the fire protection side. So let's see what that means is you guys are going out to do an inspection, how many more opportunities for repair?

--- Customer engagement ---

BRETT

22:14 Can you guys find how many deficiencies? Can you guys report, cause more deficiencies? You guys report more quotes, you guys send. The more quotes you send, the more money that's in your pocket, and it's all stemming from that one inspection.

ANDREA

22:26 That's...

BRETT

22:27 How service trade customers are paying for service trade?

--- Customer engagement ends ---

BRETT

22:30 It's it's get your technician to report one more deficiency per week. You're typically paying for the system in, you know, three or four months and then the rest of cash.

ANDREA

22:39 That sounds nice... when you are in contract which is what most of our like all of our fire alarm production is.

--- ST app contracts and pricing ---

ANDREA

22:50 And I actually don't know our contract pricing works, but our largest fire alarm testing customer, is a contract. It's a flat rate contract. So I don't actually know for us

that efficiency. I have to ask it's a great point if finding those deficiencies does anything or if it just sort of we roll it up into we do replacement to find out.

--- Customer engagement ---

BRETT

23:17 Yeah, no, that's definitely a good question to ask because that's the whole, yeah, like I said, that's the whole ROI loop of service trade itself. A lot of the customers, I speak to a lot of the fire companies I speak to. They do have customers under contract where you deficiencies are covered, but then they also have customers where they're reporting those deficiencies sending those quotes or maybe they have not to exceed amounts.

--- Pricing ---

BRETT

23:37 Hey, if it's under 750 bucks, just fix it semi Bill. So that's definitely a good question to ask. Okay. So.

ANDREA

23:49 Again, from your cost by point was by the time line cost in yours is actually very similar. So, like why would I just go with the inspection software and spend that much money but only in a vacuum, right? And know for us, that would be implementation costs and so, but...

BRETT

24:11 I'm sorry, go ahead.

ANDREA

24:12 I was gonna say the only other point about, the sort of per technician. So I gave you, these technician accounts of those, only five of them are regular alarm testing people, right? The others are in both worlds. So, from a licensing, we would probably need... I'm gonna say for it's.

--- Pricing ends ---

ANDREA

24:36 Actually, you know, no more than probably five licenses which puts us in the small market, right?

BRETT

24:45 Fine. We, we do have a lot of customers where they are cross trained, they'll do H back. They'll do fire, they'll do alarm, they'll just sprinkle or whatever, the cross train is that's normal... as far as how we typically handle that is in service trade.

--- Pricing ---

BRETT

25:00 Yeah, you would buy the five licenses for your lead guys that are doing alarm every single day. You'd probably buy two or three additional licenses for those crossover guys. And when they need it, they would take it. That's probably the best way to handle it. I don't wanna make you guys buy 18 licenses when you're only gonna use five, 90 percent of the year. That's a waste of money.

ANDREA

25:20 Before you show, if you want to show me the system just a little bit, the concept then continues to be that how would service trades?

--- *Accounting integrations* ---

ANDREA

25:33 I guess I am trying to visualize how our two departments would run on two different systems and how does the accounting world work for that?

BRETT

25:41 Remind me, I don't have it pulled up. Remind me what accounting system?

ANDREA

25:43 Work on it. I have to switch to quick Quickbooks right now. That seems to be the one we will be using, but it's not, it's also new to us because the software, the accounting system was within the software that we currently use.

BRETT

25:57 Got it. So, I mean, from the service trade side, we integrate natively with Quickbooks. It's you click a button, your pro forma invoice goes from server trade to Quickbooks, all your cost, all your financial reporting, anything that you need goes straight into Quickbooks.

--- *Type of work* ---

BRETT

26:10 To answer your question. It sounds like, yeah, you guys are thinking of, you know, find something for residential, find something for commercial, if you can find something for the residential division that also hooks up to Quickbooks. Everything just goes into the correct revenue accounts. It's you know, from server trade, we're going into the commercial fire alarm, electrical revenue account, and then vice versa for hvac residential... and that's all done via mapping.

--- *Invoicing* ---

ANDREA

26:37 Sure, exactly, just cost centers, right? But then, yeah. Okay. But then our billing departments gonna have to do billing out of both systems, right?

BRETT

26:50 So, that would be the whole idea of pushing to Quickbooks. If you push from service trade to Quickbooks, and from something else to Quickbooks for the residential side and you're billing persons only living in Quickbooks and they would Bill out of there.

--- Accounting integrations ---

ANDREA

27:03 Versus using all the bells and whistles to Bill out of directly out of the softwares that we're buying.

BRETT

27:11 Yeah. So that's the fine line right there. It's any Bill at a service trade. Yes, it's extremely customer friendly for lack of better term and it works. It works well. Customers love it. They use it and they pay you fast that's proven by data. But if you are trying to have one central location for your billing person, it would probably would be Quickbooks?

ANDREA

27:33 Right.

BRETT

27:34 Unless you have a separate billing person for commercial and residential.

ANDREA

27:38 Let me don't so just think so as we're thinking about the solution that's another, just process point, right? Yeah, absolutely. Okay.

--- Accounting integrations ends ---

ANDREA

27:55 So...

--- Purchase decision ---

ANDREA

28:05 What, what do you think is an next for us then?

BRETT

28:08 I think I would like to show you a little bit of service trade given you've seen all the other platforms. Hey, maybe it blows you away. Maybe you hate it. That's what we're here to find out. And I think, it wouldn't be right for you to make a decision without seeing service trade.

BRETT

28:21 Would you agree? Sure. Okay. So I won't show you a full demo. I could sit here for eight hours, Andrea, and tell you about ServiceTrade. So I won't go into everything, but I'll go through a typical workflow. So let me share my screen with you.

BRETT

28:39 So basically what I'll do is I'll show you the first page.

--- Access to information ---

BRETT

28:43 This is what you see when you open service trade, I created a job and inspection job for us. And then I'll basically go out to the field. I'll be your technician, do a work order, bring it back, quote it invoice. It does that work. Okay? So first thing about service trade, we are 100 percent cloud based system. Exactly what you're looking for. All you need to access service trade is internet access in a browser from the office. All your technicians need is some kind of mobile device. So whether that's iOS or android, you guys pick, we don't care and phone or tablet to up to you.

--- Dispatch ---

BRETT

29:16 But, the first thing that you're gonna see in service trade is this service dashboard. It's really giving you all in the office, visible it into what's going on. Do you do have your daily schedule? You know, what time texts are going, what job they're going to, what tech is going, and where they're going. And as text do complete these just kind of a visual. You're gonna see these little check marks saying they are completing these jobs as the day goes on. But as I roll down the screen, we have what I like to call these buckets. So this first bucket is letting you know here's any overdue jobs that don't have appointments, meaning you guys have not scheduled them. This is anything that might slip through the cracks and it's something that everyone is gonna see when they log into service. Straight. This number should say zero because you schedule everything... next. You have jobs that appointments do in the next two weeks. Inevitably, everything's going to be doing at some point. So might as well schedule it now versus waiting till it is overdue. Because that's gonna make your customer not super happy with you guys. Now, this one's really important. Excuse me. This one is really important for you guys in the office. Essentially technician goes out in the field.

--- Tech On-site ---

BRETT

30:19 Does his work order his or her work order? Excuse me, does their PDF checklist finds deficiencies if needed, whatever they need to do once they clock out that work order or that job is coming back to service trade into this bucket right here. This is allowing maybe it's your service manager. Maybe it's you, Andrea to come in, review

it, make sure everything's correct, make sure it does have all the right parts labor the job items, good stuff that you guys need to build for. From there, you're clicking a button, you're saying mark as complete? And it's falling down to this final bucket saying completed jobs to be invoiced now pending how we do the billing.

--- Tech On-site ends ---

BRETT

30:53 This can be done in service trade or this can be done in Quickbooks as we were talking about before. But that's just billing person comes in here and says here's all the jobs I need to Bill 250, that's a lot of money. And then also on this page, you will have tech locations.

--- Dispatch ---

BRETT

31:11 So basically, when your tech is doing a job and we're based in Durham North Carolina. So that's why all those pins are down here tech doing a job, he clocks in whether that be end route on site or for job prep. We're gonna take a pin of where that tech is located and drop a map, right? Or drop a pin on the map right here. That way when you guys are dispatching, maybe you do get an emergency call. You wanna know who the closest technician is. You can say I got this call from wake forest, North Carolina. Well, Jack's my closest technician. So I'm probably gonna send Jack that's a shorter drive time for him than for David things like that. Any questions on this page?

--- Dispatch ends ---

ANDREA

31:46 No, that makes lot of sense.

BRETT

31:49 Okay. Before we get into that work order, I will show you in our data model and I'll show you why this won't work for your residential?

ANDREA

31:57 You're actually in my mind on like why does it does not work for them to?

BRETT

32:01 It's you know, it's not that it won't work.

--- Customer engagement ---

BRETT

32:03 I'll touch on that for a second here. The residential business is oftentimes it is, I am going to this customer. I may never come back. So I'm gonna try to pull the most

money out of this customer while I'm in their driveway right now, whereas commercial relationships are long term contract based relationships. And that's the biggest difference. But sounds like you have something to say. So tell me if I'm...

--- *Customer engagement ends* ---

ANDREA

32:25 Yeah, I know you're right? But I think our customers are actually... most of our customers are long term 20 30, your customers, right? With long?

BRETT

32:37 Did mention high end residential. Do you have contracts with the?

ANDREA

32:42 I...

BRETT

32:43 Anyway, I'm just...

ANDREA

32:45 Saying, so, yeah, I hear what you're saying and I just again, I don't want to press us into something that doesn't really fit. So I'll keep looking at what you've got and looking.

BRETT

32:55 Yeah. And you can see, hey, Andrew, I've been wrong before. So if you, if you're advocating for, hey, I know you're telling me this won't work, but if you tell me it will, my management team won't be happy, but I will fight for you. If that's the case. It's happened before. I'm sure it will happen again anyway.

--- *Type of work* ---

ANDREA

33:10 Take a look, go. All right. Great. So now, this is the customer part.

BRETT

33:16 Yes. So this is kind of the data model and this is one of the other reasons that might be a little double entry for the residential division. So how we're based made for commercial industrial.

--- *Recurring maintenance* ---

BRETT

33:25 We work off a ship two and a Bill to like if you send your e-mail you have multi site clients as well. So in this case, JP Morgan headquarters is my Bill too. They receive all the bills for all these locations, whether it's two locations or it's 200. They're listed out here. But what I have pulled up is JP Morgan specifically in New York. This is my location or my ship too. So under this ship to this job site, Andrea have you as my primary contact, and then I track a bunch of information. So services is the physical information or the physical work that you do for the customer. So whether it is the efficiency repair that you guys need to do or it's the recurring service, I'll go to find an alarm one, for example, this fda 72 or alarm inspection. What I have highlighted is going to be your guys verbiage inside of service trade. So if you wanna be this descriptive, great. If you just want to say fire alarm inspection, your guy knows what that means. That's great too. We're gonna tie these services to the individual piece of equipment to give you guys really Rich service history. And then we're gonna set these up on the recurring basis that you guys come out. So whether it be annually semi annual, quarterly, etcetera, we're gonna set those up. So service trade reminds you to schedule and do these services. So that's services... and get that one jobs, essentially every single work order. We, we call them jobs in service trade. But this is just every work order.

--- *Assets* ---

BRETT

34:52 Your tech has done everything's hyperlink. So you do get a quick summary here, but you can click in to find more information... assets. Though this is important assets in service trade. Are your customers, pieces of equipment, your customer assets, you're tracking them for the service history to know what you did to that piece of equipment for the past five years or however long you need it.

--- *Customer engagement* ---

BRETT

35:12 But also for your customer, they call you and they say I need to know everything you guys did for me, for the past year. How hard is that to find today?

ANDREA

35:21 Typical. Yeah. Do you have a customer portal? We do. Okay. I think for us one, one or two people that we would actually give access to that.

BRETT

35:36 Yeah. And that's kinda a lot of our customers use that as a sales tool. They're like maybe they do something like gold silver, bronze contracts and my gold customers, they get the poor, they get everything and that's a way to upsell your bronze and your silver customers to be like I can give you better customer service if you spend a little bit more money. I'll give you all of this.

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

BRETT

35:59 Also on this location page, yes, you'll have a list of every deficiency on per asset. So everything's here for you. You have the ability to quote those out via service trade, which I'll take you through today. I think the big thing on this page remaining is contracts contact and service trade, or your different pricing or markup roles, pricing structures. So essentially you put them in, once you start using service trade, you apply them to your customers. Then when it is time to quote them to invoice them, the proper mark up roles do apply. So I know that was half the amount of information I just gave you on this page. Do you have questions?

--- *Recurring maintenance* ---

ANDREA

36:34 It's good to see later than you.

BRETT

36:37 Perfect. Yeah, I like to show this one because it kinda sets the stage for the rest of the demo here. So now, what we're looking at is an inspection job that I set up, JP Morgan's my site, headquarters, my Bill to you're my contact. So I did set up that nfpa 72 fire alarm inspection right here. You can see it's due sometime in the month of August, but we're going out today August thirtieth cutting the wire cool.

ANDREA

37:01 I...

BRETT

37:02 Here's the material that we expect to use on this job. Basically, we have templates.

--- *Quote templates* ---

BRETT

37:08 This is a template right here. It houses these items. It says, hey, we've done this inspection 400 times. We know what we're gonna use it is, it's basically putting it here so your technician doesn't have to waste time in the field doing it. The rest of this, I'll just show you there's no deficiencies, yet there's no attachments yet that's gonna change as your technician does work in the field.

--- *Access to information* ---

BRETT

37:30 And so I'll actually take you out to the field here. And there we go. So like I mentioned, iOS or android phone or tablet up to you. I'm on an iPad right now, but this is your technician mobile app right here. They can see scheduled jobs, unscheduled jobs, or completed jobs, and they can filter it by today just to keep things a little bit cleaner.

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

37:50 It's what I did. So when I click into this, I got a little bit of a lag on my screen share when we try to let's... see.

BRETT

38:07 There we go. Working. Okay. So here's your work order for the technician. The first thing your tech is probably gonna do is they're gonna clock in and route. So down across the bottom, you have your clock events, they're gonna say, I'm driving to location. Do you guys pay for travel time? Beautiful. That's gonna track it. Maybe your technician wants to notify the customer that they're on the way. Really easy to do that. They say, hey Andrea. I'm on the way. I'll be there at 12 35 and I'm gonna send you an e-mail you can see what that in route notification looks like. It's the customer engagement side of things. And I'll send you a few emails.

ANDREA

38:42 An e-mail not a text.

BRETT

38:44 Correct. Okay. From there, your technician drove really fast. He's on site. Let's clock in on site. This is going to track my hours in the background. There's nothing more that your technician needs to do. But now that he's clocked in, he's ready to get to work. So, what is he performing on site today? That information is housed under services right here.

--- *Recurring maintenance* ---

BRETT

39:04 It's that it's that same verbiage that you just saw from the office. It's the fire alarm inspection. And maybe there's a reason that you don't want your tech to see estimated price or duration. Everything in service trade can be turned off or on. It's all permission based. And just to point out, I know I only put one service here, but you can put multiple services on one work.

--- *Access to information* ---

ANDREA

39:22 I share. That makes sense. And then if they don't have internet access, what happens?

BRETT

39:28 Good question. So service trade does have full offline capabilities. Basically, they can do anything they need to do in their mobile application and it'll cash to the system. Once they catch a wife, I signal or so connection, it'll upload to the home.

ANDREA

39:40 Do they just need to download at first?

BRETT

39:43 Need to download it? Just do your...

ANDREA

39:45 Thing. Okay?

BRETT

39:47 It's a, it's an application, not a web app. So as soon as connections found, it'll automatically do.

ANDREA

39:53 Sorry, in order for them to have the offline and see all of this offline. Do they need to download it to their device first? And.

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

BRETT

40:00 The only... the only thing they would need to download would be their PDF, checklist, everything else they have access to. Okay?

BRETT

40:14 Under services, you got attachment a lot of times our customers specifically, they're taking before and after pictures, they're trying to tell the story to the customer of what they did.

--- Deficiencies ---

BRETT

40:24 So you come in, maybe take some pictures, some videos up to you guys. What you wanna do, you can also do audio recordings. Maybe your technician just doesn't like typing things in a time saver for him in the field. Your job items, these are your parts, you already saw the parts on the work order.

--- Deficiencies ends ---

BRETT

40:41 It makes it really easy for the technician to come in here and just say, yeah, I use this. If I click on that one, I market is used is all I have to do that way. When you guys build for it, you know, that he used everything on this list.

--- Assets ---

BRETT

If he needed to add something additional, he can do so down here. And that's going to be from your guys inventory.

ANDREA

41:00 I...

BRETT

41:01 I will show you assets again, customer equipment. We're working on this notifier system in the main lobby. I can click on it here's. All the information we know about the system. If my technician finds additional information, he or she can come in and edit it, add that information here. As you can see, there's a lot of fields that aren't filled out... but they can also see full bone service history. So here's every single work order that I have done at this JP Morgan location with the job type, whatever it is. So I can click into those. You can see what was done on July sixth. It looks like I did an alarm and a sprinkler inspection under attachments. I can see, hey, I filled out four different forms.

ANDREA

41:42 And then assuming these attachments because they're not going to be created in your system until after our go live, would we be able to upload attachments from previous reports to deal with history of all other systems?

--- *Forms* ---

BRETT

41:55 Yes, we can upload those. And then as far as like the PDF forms we take, we actually take your guy's PDF forms and put them into service trade as billable PDF. We have about 1,300 customers live active using every single day.

ANDREA

42:09 That's...

BRETT

42:09 A lot of forms for us to keep up with.

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

BRETT

42:11 So we don't provide... but yes, anything can be added in at really any time. Let me go back to our main screen here. Talking about that, you know, PDF checklist. Let's get you guys off the paper ticket, the click board, etcetera. I'm just scroll down and just hit a few more details.

--- *Forms* ---

BRETT

Gonna do exactly that. It's gonna show me a little bit more information about the job. So here that is and what all your technician needs to do. And don't worry they'll be trained on this. If this is a direction you guys go, they'll hit actions, they'll go download blank paperwork. These will be your guys forms inside of service rate. We will set up dispatch rules if it's an alarm job, they get their alarm form kind of etcetera from there. So in this case, the demo account. So I'll just select the, and I need and we'll hit generate. So what we do here is I'm sure you're used to this. We open this via Adobe acrobat, acrobats, a free app. It enables us to smart fill these forms on site. And what I mean by smart fill is all this information that I have on my service trade job pre fills onto your meaning, your technician doesn't have to waste five minutes in the field, typing it all in time is money, your technicians are expensive. So for example, you're my contact that's why your name float over onto this, but it's exactly that to fill up a document. So whether it's checking off the boxes like, so, or maybe it's free form information like this that's all your technician needs to do. He fills this out. Is this kind of what you're looking for on the form side?

ANDREA

43:43 I think so. I mean that's really that's the step for us that's really all we need.

BRETT

43:48 Exactly. Make those forms digital. You don't need something crazy. I think the next steps as far as the conditional logic that's like if you go this direction and you buy something like service trade with these fill able forms. Maybe you upgrade to the conditional logic three years down the road that's what companies typically do.

ANDREA

44:05 So something you offer it's just a different price.

BRETT

44:09 Yeah, correct. We, we do have an additional product. It's called service forms, the names changing soon to inspection manager, but it is similar to form like.

BRETT

44:27 So once your technician finishes up with this PDF in the field, all they need to do is add this back to their service trade work order.

--- Tech On-site ---

BRETT

44:34 So it's as simple as sending a copy and saying add to service trade. The cool thing is it knows where I'm clocked in on it. It says, do you want to add that paperwork to JP Morgan? We're gonna say upload, yes, exactly where I want. So back to my work order, right here, the picture I took the PDF checklist are both here under attachment. They're also reflected back in the office.

--- Deficiencies ---

ANDREA

Right? Time, right?

BRETT

Exactly. Now, if it is the case of you guys log in deficiencies whether you're quoting them or not, that can be done from the technicians, mobile device, right? Under deficiencies. So let's say alarms, I have a pulse as obstruction.

BRETT

We go, I don't have to be crazy descriptive with that because I am gonna come behind it and I'm gonna add more detail, meaning I am gonna take a picture of the deficiency. I'm gonna tell the story to my customer what the problem is. And then maybe I do want to do an audio recording because I don't wanna type anything in but I want to let the office know what they need to quote out. So it's hey, Andrea. I'm here at JP Morgan in New York. I need to fix this position structure. I gotta do XYZ to fix it. It's gonna take me two hours took me nine seconds to tell you a whole lot of information, saving your technician time. So from there technician has the ability to select all these different fields depends what kind of information you guys want in the office? Maybe I come in, I select the severity, hey, this is totally inoperable. The asset is the, again the piece of equipment?

ANDREA

More...

BRETT

And then as far as the status, it's either new, I just found it. Maybe they are under contract and I just fixed it on site, but I still want to log it. So they're aware of it. I say fixed all verified mean I sent a quote to the customer and they're aware of it. We just haven't fixed it yet. So save that in now that efficiency has been reported. My PDF checklist has been sent back to the office. Do you know if your technicians are getting their work signed off on site?

--- Tech On-site ---

ANDREA

Yes, we try to, if we can't get it, we move on but we try to, yes.

BRETT

Okay. We call that a work acknowledgement. So it's built right in and all these fields depending what you guys wanna see. Maybe you don't want text to generate invoices, permission setting. We'll turn it off for the work acknowledgement. Basically, I'm pulling this up. I'm selecting my onsite contact and I'm coming through making sure everything I just put it into the system is correct. So I'm just review.

ANDREA

Yeah.

BRETT

47:00 Then I hit that review button at the top and I turn this around to you, Andrea. You're my onsite contact, you're coming and you're making sure you're signing off on the right?

ANDREA

47:07 Stuff.

BRETT

47:09 So the, your guys TS and CS.

ANDREA

47:11 You...

BRETT

47:13 Would essentially acknowledge, yeah, Brett did everything he was supposed to do. I'm gonna send you another e-mail here and you'll get that signature move on. Is there, is there anything else from the field that you think is, you know, top minor important?

--- Tech On-site ends ---

ANDREA

47:27 No, I think those are the things that... I think for us. The number one thing is what you understanding or, your system. Obviously, I can do that is creating... the schedule and going for the technicians to know what they need to do when.

BRETT

47:45 Perfect. So I'll also talk about scheduling right at the end there.

--- Tech On-site ---

ANDREA

47:50 Well...

BRETT

47:51 So, yeah.

ANDREA

47:52 Looks great. And.

BRETT

47:55 Just gonna work out of this job.

ANDREA

47:57 I'm...

BRETT

47:57 Gonna say, yep, done with this visit, ready to move onto the next. If I go back to schedule, it disappeared because I said I was completed with it. So take me back into the office, do a quick refresh... moving a little fast. So, job status says in Progress that said appointments says completed because my technician completed what he was supposed to do, but you guys still need to review it. You're coming in, you're saying, did Brett use all these parts? Yes, he did. Maybe I'm checking this clock events. He was in route for one minute. He was on site for nine minutes, but...

ANDREA

48:32 He...

BRETT

48:32 Was 534 Miles away service trades, flagging that and say you should probably go talk to your technician about.

ANDREA

48:36 I...

BRETT

48:39 The efficiency I just found is right here. This is not the only way that you guys will get notified. You will get an e-mail notification and it'll look like... this.

--- Deficiencies ---

BRETT

48:49 It'll say, hey, Brett found this deficiency. The person that does do the quoting, they get this link... and it just says, hey, here's, further information about what your technician found on site. So here's that pole station obstruction here's, anything related if you're seeing the same thing over the course of two years, that's a problem. And then attachments there's, my picture here's, my audio recording of what was physically found. So actually, let me ask you this is because we don't know the answer to the question of customers under contract. Do you wanna see the quoting or would you rather jump to something else?

--- Deficiencies ends ---

ANDREA

49:25 I think scheduling is probably more important than quote and cross?

BRETT

49:29 Yeah, no, that's fair. So just know we can send a quote through here through service trade one click approvals. So let me just finish out this work order and then we'll end with a little bit of scheduling.

--- Tech On-site ---

BRETT

49:42 We can answer questions around that. But I do want to show you how we get this to the invoice status as well as making sure you guys have all the accurate information. So here's that PDF that I filled out. You know, I marked three things off. I hit test my picture, and there's where I got my work signed off on.

--- ST app contracts and pricing ---

BRETT

49:58 So all you guys are doing in the office is completing job and creating invoice. Brings you to this page. You're making sure your pricing contract for this customer is correct as well as your unit cost. No markups yet. Once I hit this button, the markups will be applied... and they are right here. As you can see under unit price. So this is your pro forma invoice. We're making 38 percent on this job. I'm pretty happy with it. I can always change things if I need to.

ANDREA

50:24 And...

BRETT

50:27 Then I can add additional notes if I need to.

--- Invoicing ---

BRETT

50:29 Now, this is where it gets a little hairy because we don't know, what process you guys are going with yet. Meaning, yes, you can send the invoice via service trade. I'll show you what it looks like. I'll even send you a copy so you can share it with your team.

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

BRETT

50:41 If it's sent through service trade, it has the keys of north atlantic logo at the top. It says, hey mister, customer here's. What we did for you. You guys can break it up however you want to break it up. Maybe it's just grand total. Maybe it's full line items, but your customer knows that they owe you 4,300 bucks. If they have any questions, what they're paying you 4,300 bucks for go to service details. This is a full post service report of everything that technician did on site. So what appointment did he have? What services did he provide? What parts did he use? And what attachments are here.

BRETT

51:12 So here's that customers PDF checklist. And this is the information that would also flow into the customer portal. The other the last thing on this before I show you how to get to Quickbooks, is the pay now, but customers can pay you via service trade. They can pay with a credit card with a CH. And the benefit of this that we were kinda talking about earlier is when customers use this, their customers pay them faster, they're typically decreasing days outstanding by anywhere from 15 to 20 days, which is.

ANDREA

51:45 Bye.

BRETT

51:46 If it's the case of we need everything to funnel back into the ERP or Quickbooks. We can simply send to the accounting system. And I only have online setup. I don't have Quickbooks on my computer. This is just our sales demo account. So you guys would hit submit and this would map over to Quickbooks.

ANDREA

52:00 Got it. Okay.

BRETT

52:02 That's invoicing, but let's get into scheduling.

--- Recurring maintenance ---

BRETT

52:05 Like you said, that's super important. That's not what I wanted. All right, got this. And... so this report right here kinda reminds me of what you were mentioning earlier as far as your zone and scheduling out, you know, what to do. So service opportunities, it's exactly that. It's report you guys run that, paying for any job that you have to do within certain parameters and what you select above. So maybe I'm looking at next month or my alarm division and I'm looking at recurring services. So show me all my inspection. These are all my inspections that are due next month with these parameters. Ideally you guys hit select all. I have a demo later this afternoon. So I'm not gonna hit select all it's gonna grab a couple of...

ANDREA

52:50 I...

BRETT

52:50 So we'll grab those and I search for recurring services. So I know these are all inspection if we have preferred technicians that we want to send to these locations fantastic put their names here. This is just telling the dispatcher that, hey, if Brett is

available, send Brett, if not, you can send someone else to show you. Let's look at fort of sand for there's multiple icons here. Especially what that means is there's multiple services do within the same time frame to service treats, gonna automatically put all of those on work order for you guys. So you're not going to fort of sand for four times in one month.

--- Dispatch ---

BRETT

53:25 So from here, I'm just gonna create these jobs... and there we go. So those jobs or that report service opportunities kinda works in conjunction with this map based scheduler. So let me filter this out for you... and we'll so now... let me go up to Chicago. So you see all these different pins on the map. Some of them have, some of them are gray, some of them are colored with calendars, some of them are square. What all this means? Basically all your technicians are on the left hand side. They all have a color associated that's how, you know, which technicians go into which job. However, all these gray pins right here, these are the pins that are unassigned and unscheduled. The ones we just created from service opportunities. So that's queue for you guys to come in and schedule these things. So I'm gonna grab these two right up here in north Chicago and let's say, Adam strong, he's our guy. He's go into these jobs. It's a simple drag and drop to assign the technician. But now we have to physically schedule it. So I'm gonna say I'm gonna send Adam to these two jobs in north Chicago on Thursday. The 30 first simply drag and drop these down. They gain the calendars within the pins, letting you know that this appointment is now for the 30 first of August to eight a.

--- Tech On-site ---

BRETT

54:39 M. It's expected to take two hours. This information is then reflected on the application like on the mobile app like you saw with my JP Morgan job.

ANDREA

54:47 Okay. And then the next step for us and share with all your customers too is then create either an e-mail or a letter saying we've scheduled so and so to come on site September, you know, fifteenth.

--- Dispatch ---

BRETT

55:01 Exactly. I would say a lot of our customers are doing just a call. It tends to be easier. You get a response faster.

ANDREA

55:07 We have letters and emails.

BRETT

55:09 Okay. Let me pull something for you appointments. Maybe I wanna look at... all my appointment schedule next week.

ANDREA

55:23 On...

BRETT

55:24 Fourth through the here's, all my jobs that are scheduled.

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

BRETT

55:29 Maybe something I do is send the service link. So, the service link is that post service report I was telling you about that typically goes to the customer after the fact. But if you send it prior, you're saying to the customer, hey, I just schedule this appointment. It's for Thursday, the 30 first.

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

BRETT

55:43 We wanna come out at eight 30 a. M, it's notifying the customer. When you wanna come out, what you wanna do and what you're gonna use. That could be a replacement for the emails you currently send today, and they can reply to that saying that time doesn't work.

ANDREA

55:55 And for those where we don't have an e-mail, what would we do? Or we mail them a letter?

BRETT

56:02 It sounds like you'd have to mail if you're not calling, yeah.

ANDREA

56:04 You like, would I just export information onto like a mail merge or do you have something?

BRETT

56:11 I would personally, you could print the service link. What, what do you mean by like a mail merge?

ANDREA

56:19 Again, welcome to the nineteenth century. But, right? So we have letters that literally go out and say your scheduled contractor will come out on September first and we mail it to the customer.

<div align="center">BRETT</div>

56:32 Yeah. So, I mean, my best recommendation, you guys can definitely keep using your letters that you currently have, or you could use the service language.

<div align="center">*--- Customer engagement (quoting and invoicing) ---*</div>

<div align="center">BRETT</div>

56:43 Let me just get it pulled up. Let's get this. So this is printable. And this fits into a letter head when it is printable. And it'll show all this stuff. It'll say, hey, we're coming out for your appointment on next.

<div align="center">ANDREA</div>

57:00 But I have to go through in front each one of them out like a group. So.

<div align="center">*--- Customer engagement ---*</div>

<div align="center">BRETT</div>

57:06 That's a problem. And how many of your customers don't have? Or do you guys not have emails for?

<div align="center">ANDREA</div>

57:11 I have no idea. I just don't they want me to ask, so.

<div align="center">BRETT</div>

57:15 Okay. I think a big me.

<div align="center">ANDREA</div>

57:18 I'm just saying that just be for us and something to look into, how we communicate with our customers about the schedule.

<div align="center">BRETT</div>

57:27 Absolutely. And I think, you know, a big thing service trade hops on a little bit is... we enable you to fire your worst customers. The, the goal of service trade is to fire your bottom 10 percent of customers. The ones that don't wanna work with you online or engage with you online. I guess what they're usually paying in the butt to work with. They're usually not paying you on time, fire them off work for the best customers that you can find, the ones that do pay you on time, the ones that approve your quotes online, pay your invoices online, etcetera, that's really, the service trade way. And that's something, my CEO definitely preaches. And Andrew, what I'm thinking I'll do is my CEO wrote two books. Are you a big reader? Sure. Yeah, I send you some books. One of them is called digital wrap. And that's talking about like most commercial contractors have a truck rap on their trucks. But when you're driving down the road and you see keys north atlantic, and it takes the exit, it's gone from my brain. So, what are you doing to get in front of your customers to give them that really good customer experience? Are you sending online quotes? Are you telling them the post service report, pictures, videos, etcetera, that's really the digital rap.

And then the other one is called money for nothing. And that's the whole kind of ROI loop. I was talking about, you guys are already scheduled to do an inspection. If you can find more deficiencies, you're not doing extra work. You're just sending quotes out and it's hey, I didn't do any extra work but I made more money.

--- Customer engagement ends ---

ANDREA

58:52 And...

BRETT

58:53 That's why service trade, fire contractors are growing on average 37 percent year over year and mechanical contractors are growing about 32 percent year over year. Great.

ANDREA

59:04 And...

BRETT

59:06 So, back to scheduling here, that method of scheduling. Do you think it would work for you guys?

ANDREA

59:13 Yeah, I think so.

--- Dispatch ---

BRETT

59:15 I will point out there's also a dispatch board and it's basically, you know, those reactive calls that do come in. If someone calls me, I need to get it on the schedule right now. I need to send it to a tech... and this is what it looks like. So, all your techs are on the left side. Maybe you guys have a lot of available work to get done. It's as simple as dragging and dropping these down to make your technician.

ANDREA

59:39 On busy.

BRETT

59:40 Or to my point, you do get an emergency call, you know, JP Morgan calls you.

--- Assets ---

ANDREA

59:47 No.

BRETT

59:47 That's the wrong one. That's the right one. All their information is in here. They have, their alarm is being...

ANDREA

59:57 You...

BRETT

59:57 Guys need to go fix it. We'll be out there today is one o'clock I'll have someone, do you by 245?

ANDREA

1:00:03 I will.

BRETT

1:00:05 Asset. It's just a piece of equipment and we'll say this is an alarm job.

--- Dispatch ---

ANDREA

1:00:09 I'm...

BRETT

1:00:09 Just gonna say fix it. You guys will be a little more descriptive, but this is a way to quickly dispatch a job to a technician. So, in this instance, I'm not gonna pick the technician that I'm sending. I'm just gonna save this.

ANDREA

1:00:20 Okay.

BRETT

1:00:21 Close this. Where that job goes into this unassigned bucket. It's a queue of jobs that you guys need to schedule. Let's see. I'm gonna send Brett to JP Morgan, drag it, drop it to Brett calendar. If I go out to my mobile application in the field... that, right? Yep, there we go. It's my screen share anymore. I need to get it's my problem. It's coming.

--- Dispatch ends ---

ANDREA

1:00:47 I know. But so it does show up immediately. I'm sure.

BRETT

1:00:50 Exactly. Yeah. I was like what's going on here, but there's that JP Morgan?

ANDREA

1:00:54 Perfect.

BRETT

1:00:55 Everything's flowing in real time and.

ANDREA

1:00:58 That's a big, like I said, we do an improvement on that. So that's excellent. Yeah.

BRETT

1:01:05 What I mean? Yeah.

--- Pricing ---

ANDREA

1:01:07 Take, the, that's all I can offer up to them... again. I think you set, the version I saw which is not with the conditional logic and it's just the service trade. I was like one 39, 149.

BRETT

1:01:30 Service trade is one 39 a month? One 39. Remind me, I think form length is 129, right?

--- Pricing ends ---

ANDREA

1:01:36 Yeah. Exactly. That's why I, why would I use just a conditional software versus a database? So.

BRETT

1:01:42 That's exactly what my other customers said to looks good here.

ANDREA

1:01:47 Yeah. Well, right. It just depends on what you're trying to accomplish, exactly switching to the software, okay?

BRETT

1:01:57 Would it, do you need a price? Do you need a quote?

--- Pricing ---

ANDREA

1:02:03 No, I mean, if you want to let me know what an implementation assuming your annual contracts.

BRETT

1:02:12 We are an annual contract, we can do up to a three year, if you guys wish to no more than three years at this time... I can definitely provide you a quote. Would you want to base it off five technicians? Or would you want to base it off?

ANDREA

1:02:28 No more than five. Yeah. I think five was maybe two floating, I think seems right?

BRETT

1:02:34 Two seven.

ANDREA

1:02:37 Okay.

BRETT

1:02:44 Will let you know exactly how it's gonna look. No, I won't, it's calculated doesn't go below 10. I'm grab my phone. Okay. So one 39 times, 12 months, times seven technicians, first year total or first year subscription, 11,676 dollars. And then first year implementation would be 3,500 dollars and that consist of your training, your onboarding, your data, conversion, all that good stuff. So, first year total, just about 15 grand.

ANDREA

1:03:18 15 grand. Yeah. And so I'm assuming all of the training, the implementation is done remotely or is it on site?

--- Implementation and ongoing support ---

BRETT

1:03:28 Included in the 3,500 is remote training. If you wanted us to come on site, we can, there is an additional charge for that for remote training sessions, one on one like Zoom, like we're doing right now. I think those are 149 an hour. And then for us to physically, two people from my support team, fly up and sit with you guys.

--- Pricing ---

BRETT

1:03:48 The two days you go live, that is 3,600 dollars that pays for their travel, their accommodations, as well as their services.

ANDREA

1:03:55 So, the remote training there is like an onboarding training on 3,500.

BRETT

1:03:59 Exactly.

ANDREA

1:04:01 And then if I need anything above and beyond.

BRETT

1:04:04 Exactly.

ANDREA

1:04:04 It's the 145.

--- Pricing ends ---

BRETT

1:04:07 Exactly.

ANDREA

1:04:10 Are already perfect. So really this is.

BRETT

1:04:21 I'm curious to hear how you think based on our very brief demo today, how do you think this would or wouldn't fit your H division?

ANDREA

1:04:32 So interesting that you say that... I'm still neutral? I'm gonna say I'm not like I can't lean can't tell you one way or the other, right? The second, the reason I'm saying that is you are correct and everything you just said at the end of, you know, making more money, and losing a bottom 10 percent, all that, that's the antithesis of how this company runs and on purpose, right? So... so I'm gonna say from values based, how do I want to, how to currently, right? The owners currently will take that 10 percent bottom 10 percent customer and do it right by them and they lose money, they lose money, right? Yep. So... that's not the sales pitch. This, the sales pitch, this group is efficiency and of course, how do we pay for it by finding more deficiencies? 100 percent, same as in the hvac field, right? In the hvac fields, you're not finding you're still sharing your screen. So if you want to.

BRETT

1:05:48 No, I was gonna post something up for, yeah, I was gonna post something for.

ANDREA

1:05:51 So I, so when I say that this whole software thing is bigger than just software, right? This whole approach of how we do this is also, this allows the conversation to, you know, have a conversation around that. So.

BRETT

1:06:09 Absolutely. And, I think you just said that the pitch for your company is efficiency and that's why I pulled this up. This is service transmission right here.

--- Customer engagement ---

BRETT

1:06:16 Our goal is to help you guys control costs and grow quality revenue. How do we do that? Do by improving your service and your projects operations? So you guys can focus on planned maintenance. We wanna set your technicians up for success. We don't want him carrying, that click board, that paper and that mobile device, give him everything in one location. But we also do want to help you guys sell more agreements when more project work, and at the end of the day grow that loyalty. So customers do come back to you guys. I think as you're talking to the management, I'll send you a screenshot of this. This is probably the pitch.

--- Customer engagement ends ---

ANDREA

1:06:46 Yeah, it is that and I'm gonna also say it's also the, you know, the perception of when tech show up that we are on cutting edge software, which is how we certainly on the mechanical side that's what we're for the installer that comes in when everybody else says can't be done?

BRETT

1:07:07 The, the leader in the market?

ANDREA

1:07:09 Not on fire, alarm, fire alarm is fire alarm testing, but certainly on the, each side. So again, so it's a, you know, several different personalities within each trade I think company.

BRETT

1:07:24 Yeah, absolutely. Okay. So what I'll do?

ANDREA

1:07:29 The other question that you're sort of what I want to share with you.

--- Purchase decision ---

ANDREA

1:07:32 So our decision making process is, you know, we hope by the end of September to have made a decision or at least know if we have enough information to have made it, make a decision to go with a software solution or two. And if it's two, then I need to bring you back, you know, online with us in call with the, by our team specifically.

BRETT

1:07:57 I would absolutely love that. And I know you mentioned prices is definitely something you guys are thinking about. You mentioned a really good time line, if it really is the end of December realistic or September, excuse me. That is the end of my quarter and I'm allowed to help you more.

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

BRETT

1:08:15 Yeah, they'll say yes, a lot more at the end of September than right now for the beginning of October. So if I need to help you help me help you, let me know what you need. And like you said, yeah, if that alarm team wants to see servers trade, I'm happy to do an indepth demo with them.

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

ANDREA

1:08:29 Sure. And I think what, you know, I'll share if you can share the recording that you just sent, that will help me. I can just snip it out and say, let's watch these 10, you know, what you just showed us. We could do that in house and I don't have to try and match your schedule with, you know, the other people's schedule. So, but, this is very helpful.

BRETT

1:08:48 Good. I'm super glad we were able to connect today, and give you some answers. Actually, what I'll do Andrew is we use this internal software it's called recap. It's it's essentially a shared workspace that allows me to send all the companies. I'm speaking with a lot of information in make something real quick. I'm gonna send you a copy of this and I'll put your logo and your name in a second, but it'll have the recording. It'll have a quote. It'll have screenshots. I'll write down everything you told me what was important, but I would encourage you to, you know, come in here and look in here. Helps me stay a little more organized. I think it'll be really good.

ANDREA

1:09:23 I love it that's beautiful. That's awesome.

BRETT

1:09:26 For sure. Yeah. So give me, you know, an hour. I'll put everything together and yeah, just e-mail me if you need anything at all. Should I say the end of September? Should I reach out to you mid September, see how it look?

ANDREA

1:09:37 Be time to reach out? Will be the week of September eighteenth.

BRETT

1:09:46 Okay. Do you want to, should I just call you or do you wanna put a 15 minute meeting?

ANDREA

1:09:49 I was just no idea what that we let's just ping, that Monday and we'll set something up. I'm in the office to do Monday through Thursday, it Monday.

BRETT

1:10:03 Awesome. I will send you an e-mail then I'll send you an e-mail today. I'll send you an e-mail September eighteenth and we'll see what happens.

ANDREA

1:10:09 Sounds fantastic.

BRETT

1:10:10 Thank you so much for your time, Andrea. Take care.

ANDREA

1:10:12 Thank you care. Bye bye.

The End