



Leibold Associates & ServiceTrade Consultation

Chris Kidwell with Leibold Inc.
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Participants

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OTHER

Topics

<i>Purchase decision</i>	0:22
<i>Type of work</i>	1:15
<i>Accounting integrations</i>	1:44
<i>Invoicing</i>	2:10
<i>Assets</i>	2:33
<i>Paper process</i>	3:01
<i>Type of work</i>	3:24
<i>ST app contracts and pricing</i>	5:40
<i>Type of work</i>	6:00
<i>Deficiencies</i>	7:10
<i>Paper process</i>	7:31
<i>Purchase decision</i>	8:42
<i>Implementation and ongoing support</i>	9:02
<i>Purchase decision</i>	10:36
<i>Access to information</i>	11:00
<i>Purchase decision</i>	11:26
<i>Customer engagement</i>	12:39
<i>Customer engagement</i>	13:32
<i>Purchase decision</i>	14:17
<i>Invoicing</i>	16:11
<i>Recurring maintenance</i>	16:30
<i>Assets</i>	18:01
<i>Recurring maintenance</i>	20:00
<i>Assets</i>	20:21
<i>Deficiencies</i>	20:40
<i>Tech On-site</i>	21:26
<i>Access to information</i>	21:51
<i>Tech On-site</i>	22:18
<i>Assets</i>	22:55
<i>Deficiencies</i>	23:42
<i>Tech On-site</i>	24:06
<i>Parts management (inventory)</i>	24:26
<i>Parts management (purchase orders)</i>	24:43
<i>Parts management (inventory)</i>	25:01
<i>Tech time tracking</i>	25:23
<i>Assets</i>	25:38
<i>Deficiencies</i>	27:06
<i>Customer engagement</i>	28:30
<i>Forms</i>	28:58

<i>Tech On-site</i>	30:06
<i>Parts management (purchase orders)</i>	32:09
<i>Tech time tracking</i>	32:26
<i>Deficiencies</i>	32:43
<i>Quote templates</i>	33:16
<i>ST app contracts and pricing</i>	34:36
<i>Customer engagement (quoting and invoicing)</i>	35:46
<i>Quoting</i>	37:01
<i>Parts management (purchase orders)</i>	37:20
<i>Quoting</i>	37:36
<i>Quote templates</i>	37:55
<i>Quoting</i>	38:08
<i>Customer engagement</i>	39:18
<i>Deficiencies</i>	39:41
<i>Access to information</i>	40:32
<i>ST app contracts and pricing</i>	41:02
<i>Pricing</i>	41:25
<i>Tech On-site</i>	42:23
<i>Customer engagement</i>	43:08
<i>Customer engagement (quoting and invoicing)</i>	43:23
<i>Accounting integrations</i>	44:12
<i>Invoicing</i>	44:38
<i>Access to information</i>	46:00
<i>Dispatch</i>	47:57
<i>Pricing</i>	49:07
<i>Dispatch</i>	49:25
<i>Dispatch</i>	50:15
<i>Type of work</i>	50:57
<i>Recurring maintenance</i>	51:24
<i>Type of work</i>	52:13
<i>Dispatch</i>	53:08
<i>Dispatch</i>	54:35
<i>Purchase decision</i>	55:01
<i>Dispatch</i>	55:26
<i>Recurring maintenance</i>	55:58
<i>Dispatch</i>	56:17
<i>Type of work</i>	57:31
<i>Access to information</i>	57:57
<i>Pricing</i>	59:35
<i>Pricing</i>	1:01:05
<i>Pricing</i>	1:02:37
<i>Customer engagement (quoting and invoicing)</i>	1:04:10

Transcript

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CHRIS

0:00 You be able to hear me now? Can you hear me Clay?

CLAY

0:03 Yes, you there?

CHRIS

0:04 Yeah.

CLAY

0:05 Yep. I got you.

CHRIS

0:08 Cool. How are you?

CLAY

0:09 Doing today? Doing?

CHRIS

0:11 Doing good. I'm doing good. I'm doing well. Hey, so we've had from my side, we've had a couple of balls bouncing back and forth with some folks that we're gonna to handle this.

--- Purchase decision ---

CHRIS

0:22 So I'm kinda coming in last second. So what I'm hoping to do is get an understanding of what you're looking for, and I apologize if some of this is redundant. I went through the notes but I just wanna make sure that I have a fair assessment of kind of what you're looking for. So I kinda wanna take the first couple of minutes to get a full understanding of your business, what you guys do, the problems that you're having and trying to navigate what you're trying to solve from a software platform, make sure we are a good fit, right? Fit. We'll probably get into a little product conversations, show you a little bit of the product demo pieces there. And then if the conversation goes well, we'll try to keep it moving forward if it's not a right fit or something's not right. We'll we'll shake hands and part ways.

CLAY

1:07 Okay. Sounds good. So, I don't know, yeah, how much information you have about our company, but I can give you the brief low down.

--- *Type of work* ---

CLAY

1:15 So we're hvac service, mechanical, you know, sheet metal and piping contractor, regular average yearly employees, right? Around 40 or 45 people. And then we, you know, grow as the summer months, and we get a little bit quite a bit busier over summer with renovation projects, mostly commercial, industrial, very small amount of residential.

--- *Accounting integrations* ---

CLAY

1:44 And I'm looking to get the service department, you know, a little bit more efficient and have is a platform or a system that can kinda handle the scheduling... tech hours dispatching, you know, and customer information in, you know, all in one platform that's you know, easy to use.

--- *Invoicing* ---

CLAY

2:10 And then, and then, you know, have that flow through to the office, and, you know, get tied into our Quickbooks possibly to do, you know, the end result which would be, you know, invoice and get the information back to the customer.

CHRIS

2:27 Quickbooks online or Quickbooks.

CLAY

2:30 In desktop? Yes.

--- *Assets* ---

CHRIS

2:33 Okay. How are some of those processes working now?

CLAY

2:39 So currently, we're pretty old school with the standard triplicate work order that manually has to be filled out. And, you know, then all that paperwork comes back. Hopefully it's documented on that work order with, you know, model and serial number of units.

CLAY

3:01 And then we have, our hours for, you know, what was used for that job that gets handed in like a weekly basis, to the main office here. And then someone else handles it and takes over, and builds it off of that work order.

CHRIS

3:18 Okay. How many, how many guys out in the field on the service side?

--- Type of work ---

CLAY

3:24 So strictly service, I'd say, we have about five including a service manager, about five. I was thinking another five possibly for the, we have about four or five other project managers and that I don't know how it involved I want to get with including them. But, if the system can handle some project management tasks, you know, that would be a bonus. And then, and obviously, these project managers coordinate heavily with the service department on their Construction jobs. So that's why I say another five. So a total of like 10, 10 users, I guess.

CHRIS

4:04 Okay. Talk to me about project management. What does that look like for you guys. So.

CLAY

4:11 So we have, I said four or five individuals that will handle the larger Construction projects and they are, you know, having to look at the drawings, send, attend meeting minutes, send RF, I... can keep track of change orders. They don't get involved in, the actual billing that will come, you know, out of the main office here. But there are hands on with, you know, keeping track of RF is change orders, things like that.

CHRIS

4:46 Is that more like retrofit swap out small installs, or is that heavy duty Construction, two year projects?

CLAY

4:56 It can be both and everything. But yeah, it could be, you know, rooftop unit, swap out a little renovation to a bank, or an office. But then, you know, we do a fair amount of school renovations where it can be a year long project.

CHRIS

5:18 Okay. I'll talk a little bit more about this, but just as, we do fantastic on the service side of the business, we do fantastic with small projects, stuff that carries six

plus months, requires a lot of Aia billing off to a pro core or the accounting system or something like that.

--- ST app contracts and pricing ---

CHRIS

5:40 But if, you know, I kinda call them your turn and burn projects, your tenant swap out retrofit, gotta swap out a RTU. We can handle those. Great. We can handle change orders. We can do a whip. We can do some Progress billing. But if you've got five guys on a project for a year, we don't do well handling that stuff.

--- Type of work ---

CLAY

6:00 Yeah. And, and I'm okay with that. That. So, we use other platforms like you mentioned, pro core middle exchange. Mostly, you know, when we're required by the GC or the project manager. So we're used to using them. I just didn't implement that throughout my company because I was kinda waiting to see, you know, what we would do with the service side of it. So I, I'm okay with that. So that would be a bonus if we can pull in some of the project management.

CHRIS

6:34 Yeah, we can handle the light project management stuff.

CLAY

6:37 Okay.

CHRIS

6:40 Maintenance contracts. You guys have a maintenance contract business that big small, you try to grow it. What does that look like?

CLAY

6:46 We're we're trying to grow that. So we maybe have, you know, 30 30 solid preventative maintenance contracts currently that are, you know, yearly three year renewals, things like that, but, we have it's been a struggle to keep track of those schedule, those, you know, keep an eye on them. So you don't miss some things like that.

--- Deficiencies ---

CHRIS

7:10 Okay, perfect. So we can handle those. What does, what we call is pull through revenue or a deficiency loop? How do you guys do that? Do you track that? Is that important? And what that is technician finds an opportunity of repair opportunity out in the field. How does he record that? And who quotes it? And what does that workflow look like?

--- Paper process ---

CLAY

7:31 Right. So we probably, you probably use a little, you know, upgrade to that whole process. So, yeah, it would be back to that work order that, the technician fills out. Yeah, I would have to note it and then it would ultimately come through the office. I oversee them and look over before it goes to billing. So I would have to catch that and then relay it to one of our either can myself or relay it to one of my estimators to follow back, you know? So, yeah. So, there's some holes in that system, yeah.

CHRIS

8:06 Okay. And then, and then you do majority of the quoting is that run through word docs, PDF, echo signs, DocuSign?

--- Paper process ends ---

CLAY

8:14 Mainly just our standard PDF template and then customizing it to the customer and then sending it off, yeah, email regular mail stuff like that. We, we have DocuSign, but that or that, that's mostly mainly on, our contractors contract with us. So a bigger GC, or another entity where we would be a sub to them. Okay. I don't implement, I have not implemented DocuSign yet.

--- Purchase decision ---

CHRIS

8:42 Okay. What does the timeline look like for you? So everything's great service trades, right? Or or not service trade something else? Whatever else you guys might be looking at, what is the perfect scenario of a timeline look like for you implementing a software platform, go live? Etcetera?

CLAY

9:02 Sure.

--- Implementation and ongoing support ---

CLAY

9:02 I would say within a month. Okay. We're I've been trying, to establish something and now's a good time. We just hired a new service manager and I wanna, you know, kind of bring everything up to, you know, a little bit better system and there's no use continuing with, you know, an old out of date way of operating when I have a new guy, you know, in the position to kinda roll with something new.

--- Implementation and ongoing support ends ---

CHRIS

9:31 Yeah. Cool. What else are you guys looking?

CLAY

9:37 As far as capabilities from this type of system or other options?

CHRIS

9:43 Other options?

CLAY

9:45 So... few things that have been thrown out there, your, the service trade that you're handling was brought to my attention from like an msa convention, mechanical association. There was one or two other... businesses or firms at that same convention. I think it was billed. Ops was another one. And then I was referred to.

CLAY

10:21 So the company train uses it. So I...

CHRIS

10:28 Okay.

CLAY

10:28 And, and another that's part of a two part system and I forget the name of that one, but.

--- Purchase decision ---

CHRIS

10:36 Yeah.

CLAY

10:36 But actually, so I did have, I did have a demo with BuildOps last week... I think, and we'll see how yours plays out. But that one almost seemed to be a little too intense, a little too much information, too many options. So, I'm just seeing what, the options are.

--- Access to information ---

CHRIS

11:00 Okay.

CLAY

11:00 So, user, it has to be user friendly and, you know, easy to navigate. So, I'm not saying it has to be like really dumb down, but, you know, you have to be able to, the

guys have to be able to navigate through be familiar.

CHRIS

11:18 Yeah. Yep. Okay.

--- Purchase decision ---

CHRIS

11:26 I think that's most of my questions... that at least gives me, I think we can run through a bunch of stuff today that will make sense. That at least gives me some sort of an outline.

CHRIS

11:41 Any questions for me before I kinda get started in with the dog and pony show?

CLAY

11:45 No, I don't think so all.

CHRIS

11:47 Right. Let me share my screen.

CHRIS

11:53 So, I'm gonna run through a couple of slides just to kinda give you an idea of who we are and what we do is as a software platform before I start to get into the actual meat and potatoes. So, hey, we've already kinda gone through some of your workflows and your needs, you fit the Bill for what we do. I'm gonna go through service straight and the benefits and then we'll figure out what next steps we need to do after our demo.

CLAY

12:19 Okay.

CHRIS

12:20 So, we kinda look at how we can use software to do a couple of things.

--- Purchase decision ends ---

CHRIS

12:25 One of them is control costs. And then the other one that we focus on, is growing quality revenue. One of the things we have is fit your bottom 10 percent of your customers, the ones that are difficult to deal with and find that quality revenue that you guys want and grow more of that.

--- Customer engagement ---

CHRIS

12:39 And we do that with helping you guys sell more PM contracts, capturing, those repair opportunities for those swap out those retrofit and then growing your customer or loyalty. So this is what we consider our profit Pat platform. These are all of the things that we do, from a software standpoint... service agreements, right?

--- Customer engagement ends ---

CHRIS

13:02 So those are going to be all of your preventative maintenance contracts. Any, any agreed pricing that you guys have structured with, your customer, all of your projects, your parts, time tracking, etcetera... product man, I can't speak... technician productivity, let's try that again. Just giving your text all of the stuff that they need to have out in the field to be productive and get the job done that they need to get done.

--- Customer engagement ---

CHRIS

13:32 Customer communication won't go through a couple of these things today. But I call this the Amazon experience, right? So pinging your customer about when the text on his way, the service, what we call service link is he's actually done. We're gonna go through a quoting engagement piece with the customer of what that looks like, invoicing, if you choose invoice, out of service trade, getting that engagement digitally with the customer... centralizing all of your data.

--- Customer engagement ends ---

CHRIS

13:58 So, you had mentioned this in the beginning part of this conversation, putting all of the data into one central location so that you can act upon it appropriately. And part of that as well, is managing all of the pieces of equipment. You guys are servicing, all of your quotes, your proposals, what a pipeline management looks like... is everything that we're gonna do from a software platform.

--- Purchase decision ---

CHRIS

14:21 So you should still be able to see my screen. Was there any questions on that?

CLAY

14:25 No, no.

CHRIS

14:29 I roll pretty quick through this stuff. So if you need me to slow down, let me know if we need to dive a little bit deeper, I'm happy to go through that.

CHRIS

14:37 But, I kinda talk pretty fast. So let me know where we need to slow down. But from a service trade standpoint, this is what typically you guys will see, when you log in and we can filter this out by different offices if you wanted to different regions, different job types, service lines is another filter functionality, right? So whether you're working on boilers chillers or to use whatever that is. And this is a demo account. So you guys won't have all this stuff in here.

CLAY

15:07 Right, right.

CHRIS

15:08 You can filter job by job owners or sales people if you want it as well. But what this is a quick snippet of kind of what's happening. I can see all of my technicians and where they're clocking in and out of, right? I can see Michael clocked out of that job at 11 36, a quick view of the daily schedule. I could break that out by the specific technicians if need be. As I scroll down overdue jobs without appointments, right? So I call these catchall bucket. So, we will give you guys the tools that you need to capture all the revenue as much as possible. And, and one of these is overdue jobs without appointments. So that is any sort of reoccurring service or any quote that's been approved that has not been scheduled. Yet. We'll track some recent clock events, jobs out appointments do in the next two weeks, right? So, hey, here's all the stuff that we have that's upcoming, right? Typical workflow is technician out in the field. He, he actually says he gets his work order, his job. He completes it.

--- Invoicing ---

CHRIS

16:11 Once he's actually done, the office needs to put eyeballs on it and actually approve it. And that's where this catch all bucket is. Once that happens, it moves down to this bucket of completed jobs to be invoiced from there. So you guys will choose the invoice out of service trade or you can push that to Quickbooks and invoice out of Quickbooks?

--- Recurring maintenance ---

CLAY

16:30 Nope. Okay.

CHRIS

16:32 And we'll go through this workflow here. So you'll see what that looks like. Let me just open up a location page real quick. So you can see what that looks like. So let's just screw around with capital one arena. Today, what I wanna go through is our data model, so you can kinda understand what that looks like under services. We're going to track all of your reoccurring services, right? So this is all of your PM scheduling that we will have. So we'll know your quarterly PM when they're due the

scheduling window, right? A description of what the technician is supposed to do... what's the scheduling window. So if it's a single day, a whole month, a specific week, we have the time frame to get that PM done. How often should this occur? Is monthly, repeat, every three months will be a quarterly. I could do, repeat every six months will be semi annual. And then here's all of the parts widgets, labor hours that we need for this specific. So when I go ahead and actually schedule this and turn it into a ticket, all of these will automatically flow to that specific work order. So the technicians aren't going to have to add that later.

CHRIS

17:46 The next tab down is going to be jobs, right? So on a location page, we're going to track all of your jobs and this is kind of putting all of the data in one central location, right? Organized so that if it's an office admin staff or whoever it is that needs to act upon, it can see these things.

--- Assets ---

CHRIS

18:01 We'll also see if it's actually completed and invoice is tied to that job. All that will be on a location page. The other important piece here is assets, right? So we're going to track all of your pieces of equipment that you're working on. And I'll just pull up, this piece of equipment so you can kinda see what an asset page looks like. We'll track, you know, location, the typical things that, a piece of equipment will need, model, serial number, refrigerant type, belt sizes, filter sizes, all those things based off of the different types of assets. Our services are going to be tied to a location as well as an asset. So, I know what quarterly PMS I have that are tied back to each piece of equipment. Again, jobs will be tied to a location as well as a piece of equipment. If you go that far, deficiencies, right? So, those are all, the repair opportunities that are getting captured out in the field. So you guys will have centralized data, to capture those for repair opportunities. Quotes can be tied back to a piece of equipment as well... sub assets that's the concept of a parent child asset if you will. Attachments. This is where you can put in wiring diagrams, piping diagrams, blueprints, install, manuals, tech manuals, whatever you need there. And then any comments. So you can put a comment with pieces of equipment as well?

CHRIS

19:35 That's how assets work in service trade. Again, deficiencies. We just talked about that, but they'll be tied back to a location page as well... quotes. So we'll track all of your quotes and these are a lot of, your turn and burn submittals... retrofit, 10, swap out things like that. Your, your big heavy duty stuff. Again, we won't handle. You would do that outside the system.

--- Recurring maintenance ---

CLAY

20:00 Okay.

CHRIS

20:02 Contracts, this is going to handle all of your pricing and your markup roles as well as all of your PM agreements. We'll also tell you, when they expire too. So you can run reports and show me all of my service agreements that are gonna expire this month, this year, this quarter, whatever that is, and you guys can then go renew them or not renew them.

--- Assets ---

CHRIS

20:21 And then we'll have all the reporting on the back end of how well do we do against that contract et cetera. Do we need to renew? Do we need to renew with a price increase? What happened?

CLAY

20:30 Okay.

CHRIS

20:31 Comments, self explanatory, these can be a scheduling note, a specific technician note, it can be an internal or external comment.

--- Deficiencies ---

CHRIS

20:40 So if you don't want to be customer facing, you can keep that hidden and then location attachments that's just going to be pictures of the building, pictures of a site, plans, PDF, site plans, all those things.

CLAY

20:52 Real quick on the pictures. So... we, the tech and can take pictures and then upload it to that.

--- Deficiencies ends ---

CHRIS

21:03 Correct. Yeah. So, we go rather in depth and I'm kinda going to migrate right there in a second because I think that's an important piece of this conversation is the technician productivity piece.

CLAY

21:15 Right.

CHRIS

21:17 I'm gonna pause on scheduling dispatching, let's circle back on that. But what I did for time purposes, I just created at a job and I grab some of these preventative maintenance.

--- Tech On-site ---

CHRIS

21:26 Yeah, I took two here. So this is what, a digital work order looks like in the back office, right? So what I wanna do is let me try to get my should work there we go. So just want to go through a workflow from, a technician standpoint, as well as an office standpoint, so you can see, the work order and I should use my verbiage correctly. We use the terminology of job ticket, work order. All interchangeable.

--- Access to information ---

CLAY

21:51 Sure.

CHRIS

21:53 So here's what the technician is gonna see on the left side of my screen, you should be able to see it. This is a mobile app. Were compatible with any android or iOS device. I could filter by today, right? So here's what I have on my schedule today.

--- Access to information ends ---

CHRIS

22:07 I could see all my unscheduled appointments. I could see all my completed appointments. If I wanted to see stuff up on a map, I can. So if you give your technicians some leeway, you, they could see all the open jobs on a map. If not you shut that down.

--- Tech On-site ---

CHRIS

22:18 And that's the permission based thing. But capital one are I'm gonna come down here and down here at the bottom, we have our three functions, job prep in route. So, hey, I can go ahead and notify the customer Clay. I can say, hey, we're going to be there at like 11 30. I can clock in that I'm on site. I'm driving on site. And now we can actually say, hey, you know what a short drive we're actually on site. So now here we are from a technician standpoint of everything that we're supposed to do, I set up a PM, I'll go through a service call too, just to kinda show you what that looks like.

--- Assets ---

CHRIS

22:55 It's very similar workflows. But here's what we're supposed to do. We're supposed to come here. We got a chiller maintenance thing, test this test that. But what I want to go through is all of, the tiles and this is where I can come in here and comments. I can come in here and add a comment and I can associate my comment with my job. I'm all done here. The customers happy I'll add my parts.

CHRIS

23:22 I could do it with this specific job or the service. Meaning if I had different services out at this specific location, I can tie my comments to that specific service. I'm gonna come back to deficiencies here. Attachments. This is where I can come in and start to add my, you know, my pictures of whatever it is that.

--- *Deficiencies* ---

CHRIS

23:42 Let me get a picture here. I, this is where I can come in here and start to take my before and after pictures, right? So this is a picture of the pen. I could say it could be filters. It can be whatever... this is, where they'll start to add those pictures, those videos again, I can tie it back to that specific job or that specific service... contacts, right?

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

CHRIS

24:07 Will know all of your contacts on site. So for whatever reason, they need to ping a contact, they can... job items, this is where I come in here and I start to what I call consumables. But, but because this was a scheduled PM, we already know all of the different things that, we need.

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

CHRIS

24:26 And now I just come in here and say, yep, I actually use that part and we can start to add, and use those parts. Hey, I had to use all those, all 10 pieces there. If, for whatever reason, this was a service call and I need to come in here and add a new part, right?

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

CHRIS

24:43 I can say, hey, we added a widget... right? And I can tie it back to the service. Let's say I use six of them. Cost is blank because we hide that from the technician. I'm gonna screw it up just so I can show you what that looks like in the back office... we can even go as far as sourcing the parts.

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

CHRIS

25:04 Meaning where do they come from? If I pulled it from a part vendor, a warehouse, I can just say, hey, I came off of my Danny's truck.

CHRIS

25:15 Not sick time. Let's just put it on a... equipment maintenance, whatever it doesn't matter.

--- Tech time tracking ---

CHRIS

25:23 This is where I can come in here and also add some labor too, right? So as I start to type, that list will get smaller and I can say, hey, we got double time labor. We got eight hours of double time labor. We'll also source that to the technician.

--- Assets ---

CHRIS

25:38 Okay? So, we know if we had multiple technicians on a work order, we can handle that. And Chris kids got eight hours versus Danny with six, whatever that is. Let's go ahead and add those job items. Any questions on the job items?

CLAY

25:56 No.

CHRIS

25:59 Next piece down here is assets, this is, the pieces of equipment that we're supposed to be working on. I had had mentioned this giving the technicians the tools that they need to complete their task. But hey here's, the two pieces of equipment. I could see any related assets. I could see all assets on this location. I can click into this piece of equipment. I can get a service history. I could see everything that's ever been done, right? I can come in here and click that specific past job and find all the pictures that Brett and Chris added back on December fourteenth. I could see any broken pieces to this piece of equipment attachments. Again, you can see whatever wiring diagrams, piping diagrams, et cetera, tech manuals, all that stuff would be there and you can kinda see all of models or numbers, everything else. Go ahead.

CLAY

26:48 No, that's fine.

CHRIS

26:50 Technician can also edit, the pieces of equipment out in the field. I won't go through all this processes. They could also add pieces of equipment. If you want the tech to do that. Technicians are typically pretty expensive. So that's more of a, hey, just take a picture of the rating plate and get off and I'll update it back in the back office.

--- Deficiencies ---

CLAY

27:06 Right.

CHRIS

27:09 The next piece that I want to go through is deficiencies. So here, I'm gonna come into the deficiency. I'm gonna go ahead and add a deficiency, right? And this is where we can say, hey, I found a broken compressor. We're gonna click next, we're gonna go ahead and take a photo.

CHRIS

27:32 This was the broken compressor. Go ahead and click, I'll just do one more real quick, but you can see we can do video. We can do audio, right? I can do an audio. So if I can say, I can say, hey, we're gonna need parts abc xyz, it's gonna take me eight hours to get this thing fixed. We're also going to need a 20 foot ladder and I'm gonna need a helper.

CHRIS

28:01 Go ahead and click next. The severity of this. We're gonna say that it's inoperable. We're gonna put it on that rooftop unit. It's on the cooling system. The status of this is new... and fix ASAP.

CHRIS

28:22 Go ahead and click save so that's just capturing the deficiency, what we call a repair opportunity, pull through revenue.

--- Customer engagement ---

CHRIS

28:30 We're we're very big with that specific workflow that mouse trap if you will, of driving pull through revenue. We are big believers in the software platform of giving you guys the tools to sell those contracts, those PM contracts and then capturing all that pull through revenue.

CHRIS

28:52 Tasking. I'm assuming you guys have Inspect PM checklist or start up checklists that you guys are filling out in the field.

--- Forms ---

CHRIS

28:58 Yes, perfect. So the next thing that we do here is we click view more details and this is just a little bit of a more granular view of the technician view, but they're going to go ahead and download their blank paperwork. And then we can dictate how you guys dispatch your PDF form. So these are going to be your PDF forms will help convert those to fill able for you. And then they can get dispatch based off of the different job type, the different pieces of equipment that they're working on or the different locations. So if you are doing work for, you know, Sam's club, whatever, and they have to have a Sam's club PDF, we can handle that. So we'll go ahead and generate the paperwork. I'm not gonna go through all this and I don't have... I'm not signing that's? Going to be a pain?

CHRIS

29:57 They will come in here and go ahead and see, you can see we'll pre fill the different fields... and this is all fillable.

--- Tech On-site ---

CHRIS

30:06 So this is where they'll come in here and they'll start to check. Yes. No, yes. Hey, I check these things. Any comments that I need to put in here would handle all of that, right? And then essentially, once they're done, they're going to go ahead and save this and then send a copy to service trade... that'll flatten a file and they'll upload it to service trade.

CHRIS

30:37 And then that will be under the attachments back in their job on service trade. You can see my paperwork is now filled with one.

CLAY

30:44 Okay.

CHRIS

30:47 So, from that standpoint, technicians came here, he's done everything he's supposed to do. He's essentially going to go ahead and clock out before I clock out any other questions from the technician view.

CLAY

30:57 No.

CHRIS

31:00 Go ahead and clock out. I'm gonna say, yeah, I'm done with both of these services. If for whatever reason, I ran out of time and I didn't get it done, I can leave a blanket. And then obviously, the office would have visibility that wasn't done. Am I done with this visit? Yes. Finished clocking out. Any questions from the field side?

CLAY

31:21 No.

CHRIS

31:22 Is that check in the boxes? Is that what you're looking for?

CLAY

31:26 Yeah, yeah, it should. Yeah.

CHRIS

31:30 All right. Well, then back in the office since we're essentially done with the technician view. We're still in Progress, right? Because of that workflow of our customers, somebody from the office needs to put eyeballs on this work order, this job before the custwords or the pictures get out to be customer facing, right? So we're technically still in Progress. But as I slow down, my appointments completed because the technician said that he did what he was supposed to do. And then you saw my services when I checked both of those boxes, they're both completed. As I continue to scroll down, we can kinda see the parts that we use for this, which is going to build out some of the invoice pieces.

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

CHRIS

32:09 We can edit that, right? So you can come in here and see whatever we need to edit. You can see that Chris obviously picked the wrong part. So we can fix that if we needed to for whatever reason. And he didn't type the right part in there. Where did my hours go?

--- *Tech time tracking* ---

CHRIS

32:26 Right? Hey, we can see his hours here. I could say it should have been eight hours, not one. I could fix that. I can add some parts if we needed to be whatever we'll go ahead and save that. As I continue to scroll down, we'll track our clock events, right?

--- *Deficiencies* ---

CHRIS

32:43 So kind of a check and balance. So we can see how long the technician was actually on site versus what he's saying he was on site for... the pieces of equipment that are associated to this specific work order... the deficiency, right? So this was that broken compressor that we found. So let's pop open this deficiency loop real quick. And this is where this is where we'll come in, and the pull through revenue piece, right? Where I can come in here and say, hey, all right. It looks like we got a broken compressor here's. My technicians, pictures here's.

--- *Quote templates* ---

CHRIS

33:16 His audio that told us what he needed. I'm gonna go ahead and get this quote out real quick. We'll call this repair. So an expiration date at the end of the month... we need to fix this thing ASAP. We have the concept of templates, right? So you guys will build out these templates, and these will be your templates where I can come in here. And, you know, your boiler swap out killer swap out, you know, two to five ton units, whatever it is. And I think I actually have a compressor replacement right here. This is going to be your description. This will be all your verbiage right here's. The typical stuff that we use for a compressor swap out. I, call them boiler templates, right? Let's just open up here.

CLAY

34:01 You, well, we have to build these with you or someone from your firm will help that's right?

CHRIS

34:08 Right. That's right? So, these are all the items. I'm assuming you guys have, a book or a log sheet of items somewhere that you guys typically use, we can import them into service trade. And then building out a template is simply saying, all right. Hey, this is typically what we use. These 10 items is typically what we use on a, you know, a 510 unit.

CLAY

34:29 I'm good.

CHRIS

34:31 And then because that's just a boiler template, you can come in here and say, hey, this guy lives out in like Pittsburgh.

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

CHRIS

34:36 So we're hitting them with a trip charge, of 250 bucks... right? And then I can say, hey, no, Chris said it was going to be eight hours of labor, not three. We need 10 jugs, refrigerant, not five. And then everything else looks pretty good. We'll flag anything that's not a standard cost, right? If you remember that contract, this person's under contract, so they have their pricing structure already built. So, for example, if I were to change my contract, my markup rules will change.

CLAY

35:07 Right.

CHRIS

35:09 Right. So, gold silver, bronze level pricing structure, I can dictate how I want to show this to the customer. So if it was a TAM job, for example, grand total, if I wanna line item type with detail, if we had multiple services, so that handle some of your project management stuff that we can talk about a little bit more of like, hey, we got a demo. Once we get a demo, we got a cleaning service. Then we're going to go rewire everything, right? That it can be a different service. So you can group out your quotes by your different stages or phases, if you will. We just call them services. And I'll send you some stuff on that project management piece as well. Just can't get everything done in an hour?

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

CLAY

35:46 All right.

CHRIS

35:49 So, I'm gonna click save. This looks good. What I'm gonna do is I'm gonna actually send this to you. I'm gonna, we can pick and choose which pictures we want to send to the customer, right? So I can kinda show what that looks like. I can actually send this to you. I don't know if you have access to your email or not. Yeah. So you may need to refresh your inbox, but you should see what, you know, kind of you're being your customer, if you will and giving you the customer experience of if you decide to quote these things out of service trade, this is what it will look like. You should see a.

CLAY

36:29 Yeah, I got, a service there.

CHRIS

36:32 Yeah. Ardvark is our fake hvac company.

CLAY

36:36 Sure.

CHRIS

36:37 Down at the bottom, there will be a little button view and respond to quote and you can kinda see what all that looks like.

CLAY

36:47 Okay.

CHRIS

36:50 And then if you go ahead and approve it.

CHRIS

36:59 Let me take one second.

--- Quoting ---

CHRIS

37:01 Once you go ahead and approve that, this will change from submitted to approved. We're gonna track an entire history of that specific quote. So I can see who's adding all of the pictures.

CLAY

37:12 I see this is enter a purchase or so. I can as a customer put it in my purchase number and hit approve.

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

CHRIS

37:20 That's right? And then you can even require them to put a po number in. So if you have certain customers you won't, do work for, unless they give you a po, you can require that.

CLAY

37:29 Yeah, perfect. Then it has it proved there. Yep. So where would this be saved?

--- Quoting ---

CHRIS

37:36 What do you mean?

CLAY

37:38 In the system, like under this file, this job name?

CHRIS

37:42 Correct. Yep. So, so right now we're still in quote and we're still quote two one, whatever that number is, right? So we're still in the quote status and this quote has been approved. Okay. So there's a couple of things that happen.

--- Quote templates ---

CHRIS

37:55 Now, we can go ahead and create that job from a quote, we can add it to an existing job. So if I know I back out there next week to do something else, I can go ahead and add that to an existing job or I can create a new job from that quote.

--- Quoting ---

CHRIS

38:08 And then once I create a new job, it is now essentially a job that came from a quote and that quote will be tied back to that job.

CLAY

38:15 Okay.

CHRIS

38:17 The other place that lives is under the quotes tab. So I can come in here and I can run a report based off of these different fields of whatever quotes I need to see. So what does that mean? I can see all of my approved quotes based off of show me all approved quotes ever or created by certain dates. Show me all quotes that have been submitted and viewed but not approved, right? So here's everything that we've ever done, that, the prospect your customer has taken the time to open and look but not approved.

CLAY

38:55 Okay.

CHRIS

38:57 We can also bulk send those back out. So at the end of the month, let's go ahead and run a report of everything customers have not approved. We can go ahead and bulk, send them back out. Show me all the stuff that's getting ready to expire. So we'll track all of those quotes and give you guys all these different fields, to report behind the scenes, and try to get those quote approval rates.

--- *Customer engagement* ---

CLAY

39:18 So...

CHRIS

39:19 This is another piece where we're seeing a lot of our customers grow faster than industry standards, right? Capturing that, capturing that repair opportunity out in the field, getting it back to the appropriate person to quote, have that quoted out and then track that quote, some of the, some light CRM functionality.

--- *Deficiencies* ---

CHRIS

39:41 We call them deficiencies. But that was that repair opportunity that I captured out in the field. Again, similar to quotes where I can show me all deficiencies that have been new, all the deficiencies that are out for quote deficiencies once they go from a deficiency that's been captured, quote, approve the job, it would automatically move the fixed. So you can start to build some stories for your customers of, hey, look at all the stuff that we've fixed for you?

CHRIS

40:11 Pretty simple, right? Yep. Any questions on, the quoting side before I move back to, that work order and close that?

CLAY

40:21 Only real quick. So typically, I don't know that every tech would have the ability or the authority to quote a job.

--- *Access to information* ---

CLAY

40:32 So, does this require like one head in one, one main user and the text would have a lesser capabilities or do all users have it's like one should stop shopping the same price for everybody. You know, how does that look?

CHRIS

40:54 So, so a couple of things in, that question, we have the concept of permission and roles.

--- ST app contracts and pricing ---

CHRIS

41:02 So roles have permissions that allow whatever that is that role to be. And then you assign roles to users. So technicians for example, can't go edit prices, they can put in their parts, but they can't edit prices.

CLAY

41:17 Okay.

CHRIS

41:17 So, you can build out those roles and then apply those roles based off of permissions to specific users.

--- Pricing ---

CLAY

41:25 Okay. Is, is the, you might, we could probably get into this later when we talk about pricing, but is the price structure any different?

CHRIS

41:33 So, all office and admin staff are free. We charge by a license by technician. So, office users, admin users, they're all free. It's strictly by technician license.

--- Pricing ends ---

CLAY

41:47 Okay. But what, but the admin or office would most likely, have the authority, to do the quoting and a little bit more than, the actual technician, correct? Okay.

CHRIS

42:00 90 95 percent of our customers quote from the office admin side.

CLAY

42:07 Correct. Yeah.

CHRIS

42:08 You know, sometimes the technician will see it and it's something that they can just fix. They'll go ahead and fix it and put the parts that they use on their tickets. Sometimes we can do there's a couple different workflows. But most of the time

that's coming back to the office and being quoted from an admin or a sales guy, sales rep, whatever that is.

--- Tech On-site ---

CLAY

42:23 Correct.

CHRIS

42:24 Yep. Cool. All right. So rewind a little bit if you remember, this was the job that we did out in the field at the capital one arena. We got distracted here at this deficiency. I'll come down here in my comments. You can see my comments are there, my attachments here's, my PM checklist that I think filled out in the field, you saw that workflow, but that PM checklist is gonna be here. And then my pictures as a technician standpoint would be there. So whatever pictures that they put there and I'll show you why that's important here in a second. So this looks good. I'm gonna go ahead and actually complete this job and we go one of two ways here.

--- Customer engagement ---

CHRIS

43:08 I can immediately create the invoice, but what I wanna show you is that customer in engagement piece, that getting your customers engaged with what you're doing digitally and that's what we call a service link. And this is where I can come in here and I can pick and choose what I want to show to the customer.

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

CHRIS

43:23 But I'm gonna send this to you, Clay. And so you can see what that looks like. So you're going to get a service link... right? Again, very similar to the concept of, the quote where we're picking your inbox again. And obviously, it wouldn't be a var service. It would be your guys logo, your guys branding on that pinging your customers inbox, but this is kind of everything that happened as you can see all of my appointments. We were here to do that chiller work. If it was a service call, obviously that would be there and that's going to have everything there that you wanna show to the customer.

CLAY

44:02 Yeah.

CHRIS

44:03 I turned a lot of these check boxes off. I should have turned them back on so that it had some more content. But right again, you can pick and choose what you want to show to the customer.

--- Accounting integrations ---

CLAY

44:12 Okay.

CLAY

44:17 That's...

CHRIS

44:17 Just the kind of, the Amazon experience, the digital, the customer engagement piece. From there, we go ahead and invoice this job. And this is where we start to pull our hands out of the mix. Whatever you mean by that is, hey, we're not in the RP system, we tie into a lot of different ERP systems, whether it's a Sage product, Quickbooks desktop.

--- Invoicing ---

CHRIS

44:38 Obviously, we have an integration with, I can show you what that looks like. But if you choose to invoice out of service trade, you would go ahead and send an invoice link. Obviously, if you're gonna push it to Quickbooks, this would say send a Quickbooks.

CLAY

44:50 Okay.

CHRIS

44:52 The reason why most folks are migrating the invoicing out of Quickbooks is we kinda have the saying of quote to cash. How fast can you capture that cash? And one of the things that we do now, is we put a pay now button up here. You're obviously engaging with your customers on a quote basis, service link basis. Your technicians are sending them the notifications, and then this invoice... is tied back to the service link... right? So that service link now is going to have all of my appointments, the services, all of my parts and labor the pictures, all of that now is tied back to the specific service link so that your customers know what that invoice is tied to and they can click pay now and pay with a credit card to pay with AC. H.

--- Invoicing ends ---

CLAY

45:39 Okay.

CHRIS

45:44 And I can send you that just so you see what it looks like. Obviously, you can ignore it. But just so you have in your inbox because I think the point there is I've gotten free marketing to you three different times just by completing one, one service call, one preventative maintenance task, right?

CHRIS

46:00 Right? I wanna take a pause before I get the scheduling and dispatching to see if this is making sense. If I'm if I'm checking the boxes, how do we look?

CLAY

46:14 Yeah, no, it looks good. I think it's looks like it's easily... able to be navigated... and how, so this is an app. So, the text would have the app, everything will be done on a phone or possibly a tablet or do you recommend one over the other?

CHRIS

46:40 So, this is the app on the phone, right? So it's just the service trade app compatible with any android or iOS device. 95 percent of the workflow can be done strictly from their phone. The only thing that is a little bit... pension drag fat fingers. If they have to fill a PDF out on their phone, it's easier to do with a tablet than a phone.

CLAY

47:08 Okay. And then when it comes to handling the invoicing that should, so that could tie into a PC or a laptop just a little bit more, you know, bigger screen is more for ease of, you know, seeing all, the different tasks that would, that, is that what most people would do?

CHRIS

47:34 Hang on a second. So, when you're saying invoicing versus tasking, you mean getting that invoice out to the customer?

CLAY

47:40 Yes.

CHRIS

47:42 Yeah, that's going to be through a web browser. So, Google Chrome, safari, a Microsoft, a firefox, internet explorer that's where that lives, that's just in a browser.

CLAY

47:55 Okay. All right.

--- Dispatch ---

CHRIS

47:57 So, this is just in a browser. So any browser, you can run from the office standpoint, and the technicians would have an.

CLAY

48:04 Gotcha. All right. So far?

CHRIS

48:10 Okay. Kinda touch on some scheduling a dispatching real quick. This is what our dispatch board looks like. Right here. We have any available jobs, right? So these can be, you can see all the different job types, right? So, and then this is all kind of drag and drop as well being that it's a little dynamic. So, and then down here, this is the technician associated over here with their respective swimming and what they're supposed to do throughout the day.

--- Dispatch ends ---

CHRIS

48:41 And this is where we handle more of the reactive service calls, where I can come in here and say, hey, capital one is calling us again.

CLAY

48:50 And it's kinda like almost like live... time where any service can check in, and take a call, or the service manager can dispatch to more than one one tech.

--- Pricing ---

CHRIS

49:07 That's right, right? So, hey, they're saying they got no heat. I can put it on that rooftop unit, you know, go and fix, not to exceed seven and 50 bucks, right? And I can say, hey, it's 1,145. Let's get there by one one o'clock and I can just go ahead and save that.

--- Dispatch ---

CHRIS

49:25 And what that does is that falls into an unassigned bucket, right? Because I don't know who can get there first. And now that I see that brett's got nothing to do, I can say Brett is going to get there at one o'clock and that will, Brett will get an email notification and that will automatically populate on his phone in his app and he knows he's gotta go get to capital one at one.

--- Dispatch ends ---

CLAY

49:43 Okay. That's...

CHRIS

49:45 That's...

CLAY

49:47 Would be, you know, taking control of inputting this the, you know, the most real time frame and most an itemized by importance. So the, in our case, we'd be like a service manager would be putting inputting these details.

CHRIS

50:04 Yeah. Yep. That's typically your service manager that's putting this is, he's handling the phone calls, capital ones calling him, pitching up a storm, saying, my God, the world is gonna end, right?

--- Dispatch ---

CLAY

50:15 All right. Okay.

CHRIS

50:17 Okay. I'm going to get to you at one, right? Brett is going to get this notification. Brett is gonna say, I can't get there at one and he's gonna say, all right, well, then, fine, I'll send Chris. And now that's off of Brett, brett's calendar. And now that's on Chris.

CLAY

50:30 Gotcha. Okay?

CHRIS

50:32 If I needed to put two technicians on here... I can go ahead and add Brett, and you can see now that it's already now back on his schedule. So you can have multiple technicians on a specific work.

CLAY

50:44 All right.

CHRIS

50:45 So, for some of, the lighter project stuff where you might have three or four or five guys on a five day job, we can do that with different appointments in different tech.

--- Type of work ---

CLAY

50:57 Right, right.

CHRIS

51:02 This is what your, this may take a second. So this is where your preventative maintenance scheduling. So more of your predictable scheduling, this is where this is

gonna live and this should go, not be too long. The reason why this is long is because it's a demo account and we got a bunch of sales guys with shitty data in there.

--- Recurring maintenance ---

CLAY

51:24 But this.

CHRIS

51:24 Is where we handle all of your PM scheduling. So I can see, hey, show me I'll stop this month, next month, two months out, three months out. Reoccurring services is going to be all of, your PMS, your semi, annuals, quarterlies, approve services would be your quotes that have been approved, and one time would be service calls, but this is where I can come in here and kinda grab.

--- Recurring maintenance ends ---

CLAY

51:47 Dumb question. Those little icons on the right there and they real like they will show up and that is kind of like visual like I'm assuming a plug is an electrical problem, the spinning fan is maybe a fan issue. So they're actual icons?

CHRIS

52:09 Yes.

CLAY

52:09 Okay.

CHRIS

52:10 Yup. They're they're all icons you can see like this is a fuel one.

--- Type of work ---

CHRIS

52:13 And again, this is a demo account. So you wouldn't have that stuff, but Greece systems that's a commercial plumbing issue.

CLAY

52:20 Yeah, no, that's kinda cool because, you know, sometimes it takes a little picture for somebody, to register in somebody's head. What would it really involves?

CHRIS

52:30 Yep. So here's where we can kinda say, hey, these are going to be my PMS again, I'm gonna go through the preventative maintenance scheduling. And to your point, I

can come down here and see those little icons and see what that is. Is some air duct maintenance. This is that general electric. I can see that this is a quick hour and a half job for 500 bucks is what we typically Bill on that one down here.

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

CHRIS

52:53 We got an hour project for a 1,000 dollars... but we go ahead and create these six jobs. And what most folks do is they'll check this box so they check all of them and throw everything up that we have to do. I'm not gonna do that because I don't want to ruin the demo account.

--- *Dispatch* ---

CHRIS

53:08 But... the next thing we do is we start to throw all those things up on a map. And again, you wouldn't have all of these things. But now we add a couple of offices. And as I scroll down, you can filter this out by the different service lines. I could filter it out by my estimated price as well, right? So my PMS that are a little bit more. I can go get those things done out of the way and then save the cats and dogs for a later time frame. And then this throws everything up on a map... and you can kinda see, the pins are color coded. Gray means I have no technician scheduled through for it and calendar icon means no appointment. And then this is all drag and drop me. I can come down here and I can say, hey, Shawn is going to get this office. I mean, Shawn is going to get that appointment and I can drag and job and say, Shawn, you'll get their Saturday. And now that Shawn is going to be there Saturday, I could say, hey, you know what? Actually that's going to be a two day job or I wanna move that to Friday.

--- *Dispatch ends* ---

CHRIS

54:11 And now, I've just moved, that to Friday, for Sean, I could say or go is going to get to that stone creek village job and he's going to get their Friday Saturday... or if I needed to add Jordan to that job, I can as well. And now we have two technicians on that, and this just kinda throws all of, your stuff up on a map.

--- *Dispatch* ---

CHRIS

54:35 Obviously, you guys wouldn't have the entire United States but just to give you kinda a little bit more context contextual view of what's going on?

CLAY

54:42 No, that, that's daily weekly, or monthly like that?

CHRIS

54:49 This map, is... monthly?

CLAY

54:54 Okay.

CHRIS

54:54 But you can put it down to a weekly or daily view. And down here at the bottom is a weekly view of kind of what's going on?

--- *Purchase decision* ---

CLAY

55:01 Right.

CHRIS

55:02 I can see, hey, what's going on next week as well?

CHRIS

55:10 So, hey, we, I think we allotted for an hour. If I'm not mistaken, it might have been 45 minutes. We did 45 minutes. So I'm a couple of minutes over, but I mean, thoughts questions, concerns is I check in the boxes? Yeah.

--- *Dispatch* ---

CLAY

55:26 Yep. And then to kind of on the schedule thing here. I like the visual, the, you have the calendar week by day and then the visual. So the names are in there, the times and then the little map icon. So, if we wanted to schedule PMS for the whole year by customer, can we input like a full years calendar and like implement those and have them available like reassign them?

--- *Recurring maintenance* ---

CHRIS

55:58 So, yes, the thing to do, right? So back here, I know that this capital one arena, I have a quarterly PM here and I have to do it on a single day window the first day of every month. I know that this one's automatically going to get scheduled.

--- *Dispatch* ---

CLAY

56:17 Right.

CHRIS

56:17 So, you run that report and then you can also, where is it... preferred technicians? Is what I was looking for. So I can also make Chris kid. Well, the guy that this gets scheduled to every single time.

CLAY

56:32 Okay.

CHRIS

56:34 So, yeah, you can say, hey, Chris, kid. Now, it's not until you actually turn that service into a job, meaning you go through that service opportunity reports and just say, make my PMS then it actually gets scheduled out.

--- Dispatch ends ---

CLAY

56:45 Okay.

CHRIS

56:48 So, to answer your question, yes.

CLAY

56:50 All right.

CLAY

56:56 Okay. I think that's I think, it covers everything that we would need and use it for, how about, the price structure?

CHRIS

57:09 Yeah.

CHRIS

57:15 So... you'd have to remind me refresh my memory again. I don't know how many guys you would have from the project management side, but you're going to be somewhere between the selector, the premium side?

--- Type of work ---

CLAY

57:31 Yeah. So... briefly said, so five in the every day service world, but then maybe another five as project managers, that would benefit by knowing where techs are, but not so much. You know, there would be more in charge of projects and not really messing around with scheduling the text.

--- Access to information ---

CLAY

57:57 It it handy to know like just for them to log in and see where techs are or the availability or who's scheduled, where, but really not have to reassign or, you know, be as involved as the service manager. So I'm not sure how the, like I was talking about before the licensing or users or, who would have what access?

CHRIS

58:24 Yeah. I mean, if they, your project guys, do they have some sort of tablet or laptop out in the field? Yes. Yeah, they can just log into a browser. They don't need a license.

CLAY

58:37 Right.

CHRIS

58:38 Yeah, they can just log into the browser. They don't need a license for that. It's more guys that need the mobile app and are clocking in and clocking out and adding pictures, and telling you what I use and what I didn't use, and handling the service calls, of getting them fixed. They're the folks that need the licenses.

CLAY

58:59 Right. So, I guess, like, yeah, like five licenses or five... text field text. And then a couple of like two or so of the service manager types that would handle that would be in the back end, handling the invoices and quote.

CHRIS

59:24 Okay.

CLAY

59:24 And then, and then the other people, like we mentioned, the project managers would just log in off of their laptop, and more. So just see what's going on.

--- Pricing ---

CHRIS

59:35 Yeah. So it sounds like you need five licenses because your service managers will be free. Your, your project managers just need overview. They're they're going to be free.

CLAY

59:45 So...

CHRIS

59:45 Five licenses you could probably get started on select because that comes with the Quickbooks integration. And then if you need to add more licenses or if you wanted to upgrade for more functionality, you could always go down to premium at that point.

CLAY

1:00:02 Okay. That's 89. So it's 89 a month. Yeah, per...

CHRIS

1:00:10 Per technician that?

CLAY

1:00:12 Right, right. So that's you know, per technician, we say we're...

CHRIS

1:00:16 Eight.

CLAY

1:00:17 Nine times five. So 445 a month.

CHRIS

1:00:22 Yeah.

CLAY

1:00:23 For the year? Yep. Okay. Any, and that any like initiation or setup fees or anything like that?

--- Pricing ends ---

CHRIS

1:00:33 There are some setup fees. There are some data migration fees. I don't know what that is off the top of my head. I have to look it up.

CHRIS

1:00:48 I'm trying to see if I have it.

CLAY

1:00:53 Any cost for the app?

CHRIS

1:00:56 No, that's you just download that from, the... gosh. Dang, what is that called? Apple store?

--- Pricing ---

CLAY

1:01:05 Sure.

CHRIS

1:01:13 Yeah. I mean, setup fee is going to be data migration and the setup cost and the training is going to be about 2,500 bucks.

CLAY

1:01:19 Okay. And like one time thing?

CHRIS

1:01:22 One time?

CLAY

1:01:23 Yeah. And then, so 80 89 times the five is 445... per month. That times the 12. So about five, yeah, 53 40 plus the 25, is about all in, for the first year for five end users? Yeah. Okay. All right.

CHRIS

1:01:51 Ready to get started, send you a contract?

CLAY

1:01:53 You can send it over. So to be honest, it is price wise, a lot better than, the other options I was looking at and I think user friendly wise.

--- Pricing ends ---

CLAY

1:02:08 I think it's pretty good. It's not crazy but not, you know, super basic either. So, I think it's I think it's pretty good. Okay. And, how long is the process of, you know, integrating our stuff with, you know, the, you know, our templates, our information and our Quickbooks stuff.

--- Pricing ---

CHRIS

1:02:37 So, plan on about two to three months. Okay? And, that's a under promise and over deliver typically we go faster, but let's just be on the safe side somewhere between 60 and 90 days.

CLAY

1:02:53 Okay.

CHRIS

1:02:54 How how many PDF forms do you guys have? Do you know?

CLAY

1:03:04 So, you have you're talking about like the like startup sheet?

CHRIS

1:03:08 Yeah, startup sheets and PM checklist, like.

CLAY

1:03:13 I don't know less than 20.

CHRIS

1:03:16 Yeah. Okay. I'll put you guys down for, I'll put five down. And then if you need to add more, that's fine. Yeah. Okay. When should... I mean, are you guys, do you need to have an internal conversation? Are you wanna see a formal proposal?

--- Pricing ends ---

CLAY

1:03:47 Yeah, I just got, I just wanna talk about a little bit with the guys that are going to be involved. You can, if it's not, if it's not too much, or if you're okay with sending a proposal that way, I can see exactly what, you know, what we're getting what we're paying for. And then if I'm good to go with it, I just sign it.

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

CHRIS

1:04:10 Yeah, I'll send you a I'll send you a proposal. If you're good to go with it. Let me know we have, we go through DocuSign which is why it came up earlier. What I'll do is I'll turn that into a file assignable doc if it's good to go.

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

CHRIS

1:04:24 And then I'll send that to you via email. So why don't I give you about a week? I'll touch base with you. End of next week, I'll put that proposal together, get that over to you this afternoon, touch base with you. End of next week. If it makes sense, we'll turn it into a signable doc and get the ball rolling or if we need to have some more conversations, we will.

CLAY

1:04:44 Okay. All right. I think we're good for now.

CHRIS

1:04:49 Thank you, Clo?

CLAY

1:04:50 All right. Thanks a lot.

CHRIS

1:04:51 Nice to meet you.

CLAY

1:04:52 You too. Have a good one.

The End