

Business as Unusual: Part 5

Lessons Learned from an Information Systems Journey

Brian Mount, CEO

Tempo Inc.

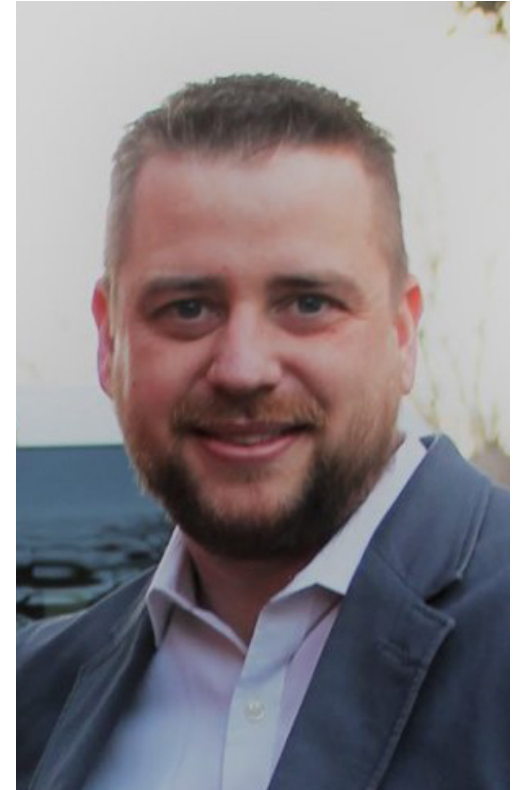
<https://www.tempoair.com/>

About Brian Mount

- Chief Executive Officer of Tempo Air, an HVAC and Plumbing contractor in the Dallas-Fort Worth area.



- Over a decade in residential HVAC.
- With roles focusing on:
 - Operations
 - LEED certification
 - HVAC design for new construction
 - General Management



Takeaways from Today's Webinar

- Learn how Tempo has focused on pulling data from a range of sources including web-based applications, APIs, cloud-based query, and has utilized internal development to move the business forward on the cutting edge of residential HVAC during the Covid-19 crisis.

Major Takeaways for Today:

- **Turning Data Into Information**
 - Warehousing and Accessing Data
 - Using Software for Insights
- **Lessons Learned from Software Implementations**
 - It won't go smoothly. Document!
 - Upsale and API's
- **Applying Web-Based Productivity During COVID-19**
 - Increase productivity + Real time insights

Turning Data Into Information

Warehousing and Accessing Data – Local Servers



- Don't have to pay per user
- Works optimally only on premises
- Reporting is limited to the program and the local server's ability



- Building power failure
- Cyber Security – (Critical)
- Language is less than user friendly – outdated stagnant GUI
- Specialized Tenured IT to run and Maintain

Turning Data Into Information Warehousing and Accessing Data – Web based

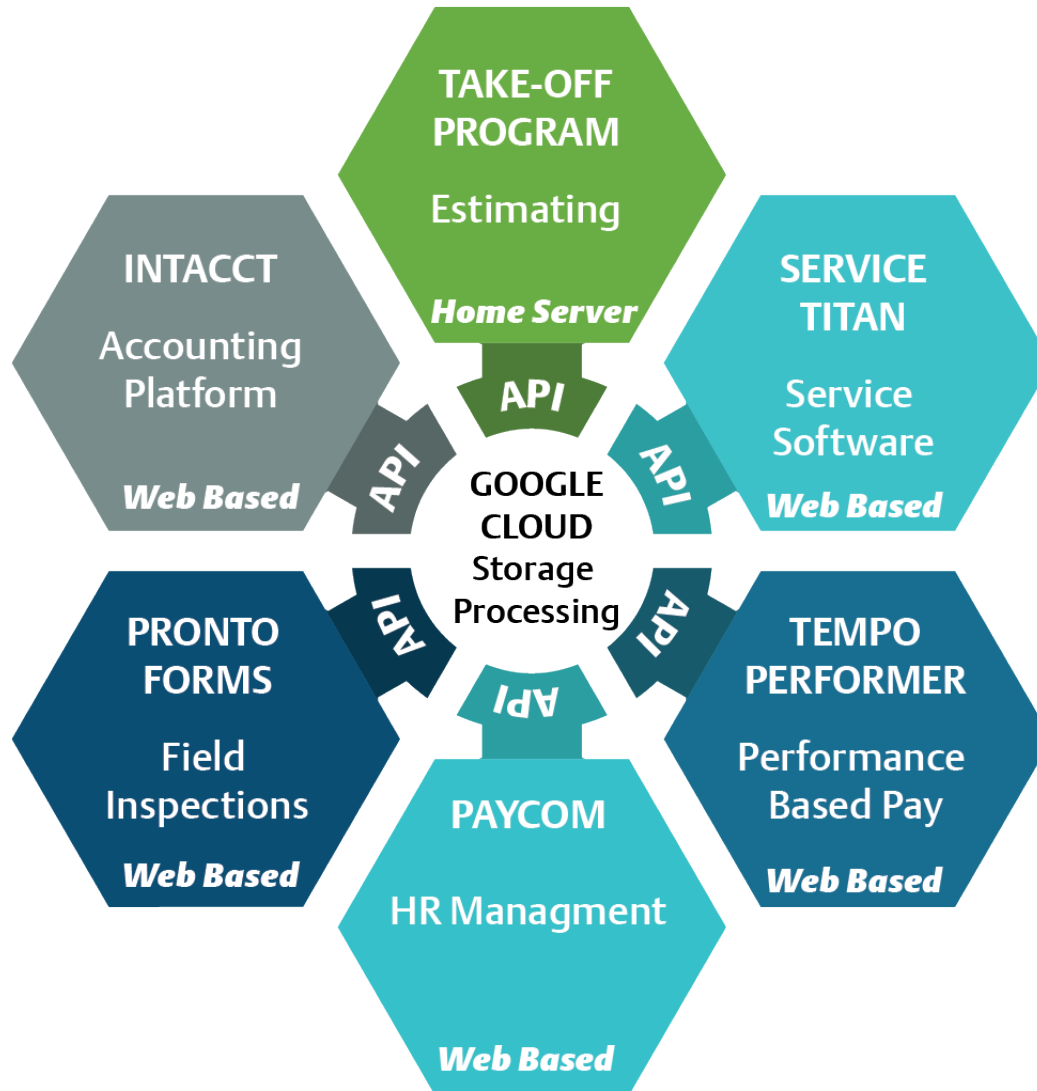


-User-based Subscription
Models

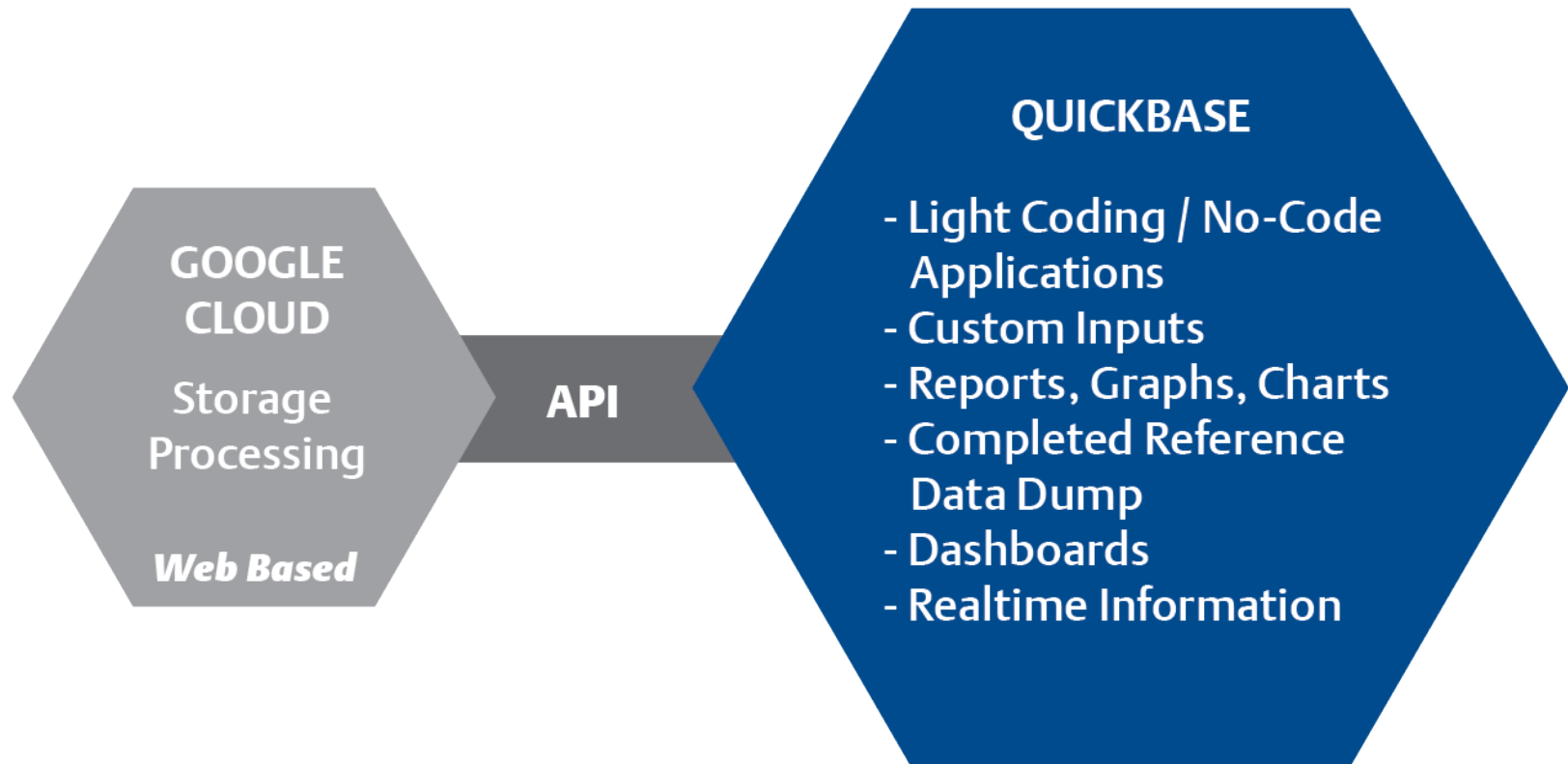


Access
from
anywhere

Turning Data Into Information Using Software for Insights – Data Collaboration

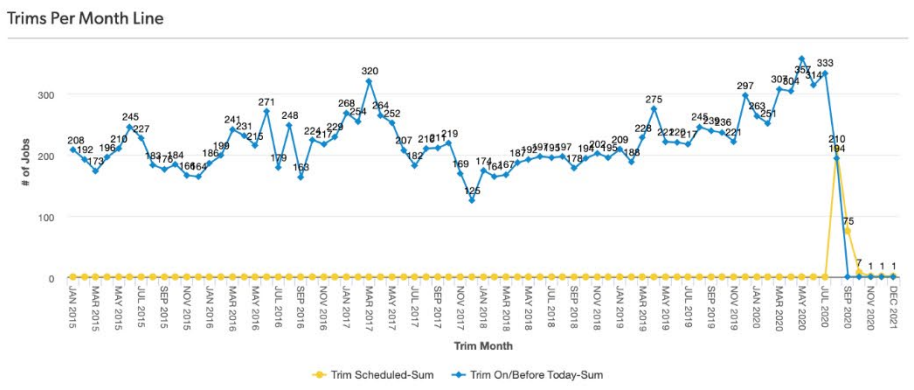
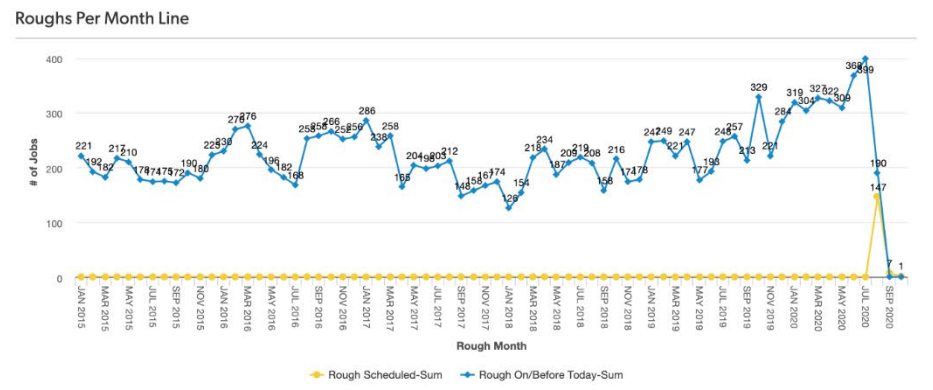
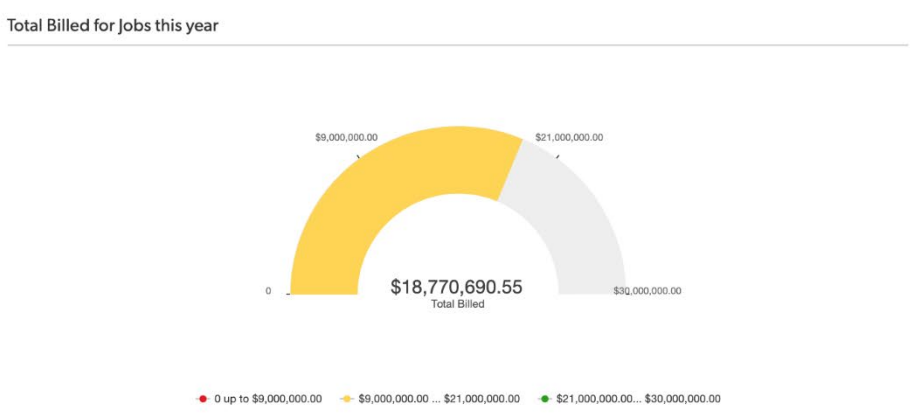
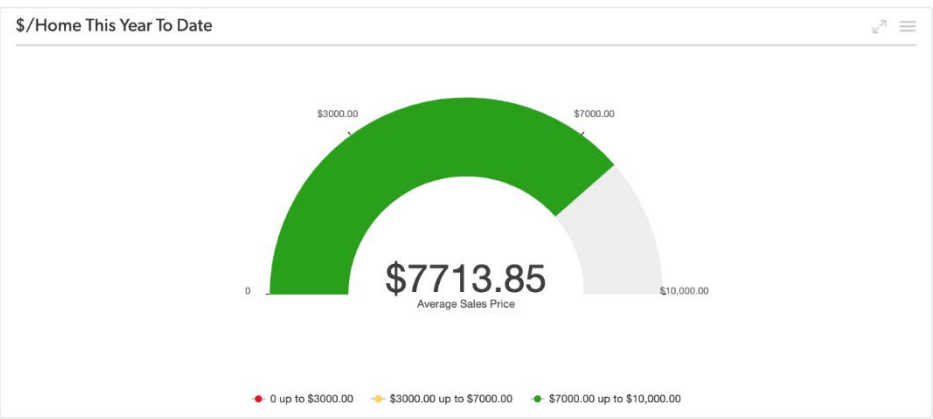


Turning Data Into Information Using Software for Insights – Data Collaboration



Everyone can learn to use reporting!

Turning Data Into Information Using Software for Insights – Reporting Example 1

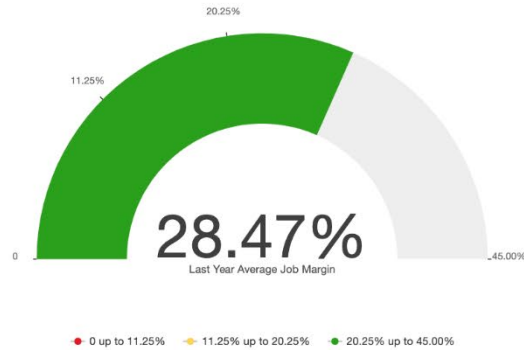


Service Titan + Intacct - Data
Reported In QuickBase

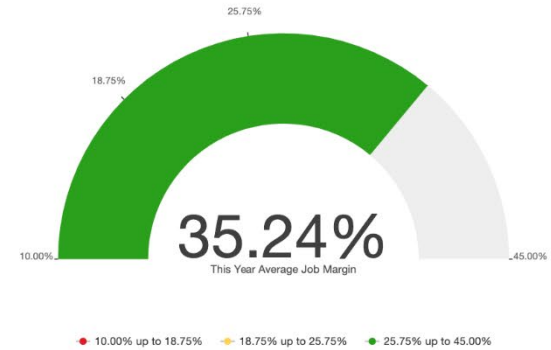


Turning Data Into Information Using Software for Insights – Reporting Example 2

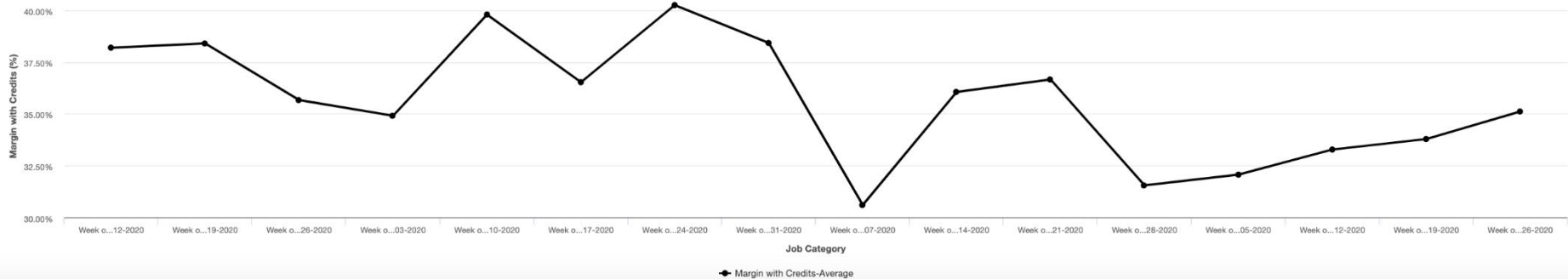
2019 Margin Gauge



2020 Margin Gauge



120 Day Margin Progression



Service Titan + Intacct + Tempo Performer - Data
Reported In QuickBase



Turning Data Into Information Using Software for Insights – Reporting Example 3

120 Margin Progression

Is Project	Job Category	Job Number	End Time	Service Titan Link	Job Status	Business Unit	Date Modified	Intacct Billed Amount with Tax (Includes Deferred Revenue. Not in Margin)	Intacct Paid Amount (Cash collected from Customer)	Deferred Membership Revenue (Not included in margin)	Incentives Cost (Included in Margin)	Equipment Cost (Included in Margin)	Labor Cost (Included in Margin)	Other Cost (Included in Margin)	Materials Cost (Included in Margin)	Total Cost	Warranty Credits	Margin with Credits (Includes Warranty Credits)	Review Notes	Margin Revenue (Revenue used in margin calculation)
Week of 08-02-2020 (93 Jobs)																				
no	Membership/Inspection	204411695	08-03-2020	Service Titan Link	Completed	Plumbing - SF Mbrship/Insp	08-10-2020 09:57 AM	\$0.00	\$0.00	-\$24.35	\$0.00	\$0.00	\$44.20	\$0.00	\$12.80	\$74.68	\$0.00	-100.00%	customer declined estimates JT/	\$24.35
no	Billable	204598931	08-06-2020	Service Titan Link	Completed	Cooling & Heating - SF - Service	08-14-2020 05:20 AM	\$591.55	\$541.55	\$512.55	\$0.00	\$0.00	\$100.25	\$0.00	\$0.00	\$140.35	\$0.00	-100.00%		\$29.00
no	Membership/Inspection	204306919	08-05-2020	Service Titan Link	Completed	Plumbing - SF Mbrship/Insp	08-13-2020 05:22 AM	\$0.00	\$0.00	-\$66.17	\$0.00	\$0.00	\$76.74	\$0.00	\$12.80	\$120.24	\$0.00	-81.71%	plumber left estimates. JT/	\$66.17
no	Membership/Inspection	204451991	08-03-2020	Service Titan Link	Completed	Cooling & Heating - SF - Mbrship/Insp	08-07-2020 05:21 AM	\$0.00	\$0.00	-\$52.66	\$0.00	\$0.00	\$54.90	\$0.00	\$0.00	\$76.86	\$0.00	-45.96%		\$52.66

Year-to-Date Summary, by Category of Call

Job Category	Number of Jobs	Intacct Billed Amount with Tax (tot) (Includes Deferred Revenue. Not in Margin)	Total Cost (tot)	Warranty Credits (tot)	Margin with Credits (avg) (Includes Warranty Credits)
Billable	1566	\$591,895.38	\$211,382.72	-\$2,378.65	50.40%
Membership/Inspection	4414	\$509,268.67	\$391,378.76	-\$643.01	42.79%
Project	2315	\$6,261,770.95	\$3,068,959.86	-\$130,391.63	31.54%
Return Trip/Unbillable	20	\$4,175.50	\$2,018.12	-\$436.25	-1.80%
Unspecified	1317	\$109,067.76	\$62,755.39	-\$9,530.35	1.43%
Warranty Service	166	\$37,197.00	\$18,148.68	-\$2,006.90	4.75%
Totals (6 groups)	9798	\$7,513,375.26	\$3,754,643.53	-\$145,386.79	35.05%

12 Month Rolling Margin Progression by Job Category Su...

Job Category	Number of Jobs	Intacct Billed Amount with Tax (tot) (Includes Deferred Revenue. Not in Margin)	Total Cost (tot)	Warranty Credits (tot)	Margin with Credits (avg) (Includes Warranty Credits)
Billable	2736	\$1,023,563.31	\$361,925.73	-\$4,049.01	50.24%
Membership/Inspection	7099	\$657,654.92	\$601,781.50	-\$643.01	42.25%
Project	3338	\$10,760,077.28	\$5,330,388.52	-\$215,361.83	30.67%
Return Trip/Unbillable	25	\$4,683.50	\$2,305.24	-\$436.25	0.63%
Unspecified	2404	\$138,509.56	\$119,550.66	-\$9,612.14	1.94%
Warranty Service	344	\$45,165.50	\$38,714.15	-\$7,153.86	2.29%
Totals (6 groups)	15,946	\$12,629,654.07	\$6,454,665.80	-\$237,256.10	34.19%

Service Titan + Intacct + Tempo Performer - Data
Reported In QuickBase



Recap and Next Up

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Lessons Learned from Implementation

It will not go smoothly

- Make sure everyone understands the time/effort required during software implementation.
- Start with the end in mind: know what you want and don't let it get lost.

Document!

- What you believe you are getting and what they believe they owe will be two different things. Document their commitments, continue with the implementation and negotiate the shortfalls on the final bill.



(Brian) Need an example/Story for Flavor, maybe a time when documenting didn't happen?

Lessons Learned from Implementation

The Up-Sale

- Ensure you understand what is included in what you are purchasing.
- Software implementers will have countless add-ons and upgrades (similar to us), keep your original goal in mind when evaluating them.

APIs

- You'll need any software purchase enabled with APIs for data in and out of the software.
- This can cost extra, offer limitations.
 - E.g. Service Titan won't allow APIs to populate their core fields.
- However, some programs will allow customizable APIs in their program to match your specific needs

(Brian) Need an example/Story for Flavor...maybe some more around Service Titan here?

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Applying Web-Based Productivity During COVID-19

Local Server Applications

- Require a remote login to access applications
- Remote Logins are slow and less reliable
- Remote Logins typically cost more based on number of users
- If server goes down, everyone goes down

Web-Based Applications

- People can be productive from anywhere they have internet service
- One person's computer goes down and everyone else is still working
- Security is on the applications side and not your side

Applying Web-Based Productivity During COVID-19

Moving to Web-Based Applications

- We learned quickly through COVID-19 the unreliability of our home-based applications and are moving 100% web-based
- We'll use server log-ins to reference files stored on home servers only, not to create data.
- Less dependency on home servers lowers the capital expenditures for business infrastructure and moves costs to operational expenses

Of our 7 primary enterprise software, 5 are now web-based!



Applying Web-Based Productivity During COVID-19

Tempo during Covid

- Our productivity did not diminish, even when working from home.
- Personnel are inspired by being using their devices and home internet to complete their job functions, without traveling to the office.
- In many areas, productivity has increased
- By using web-based reporting, management can see issues and can address in real-time.



In Conclusion

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- Know where are you now & where do you want to be
- Build a Data Warehouse first
- Find a suitable information reporting system
- Identify the missing information and implement programs to get it.
- In our experience Web-Based systems Trump Home Servers.

Thank You Slide

Brad for continuity