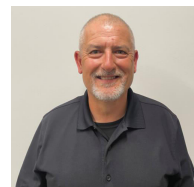


# Leveraging Service and Maintenance Technology

June 28, 2023



## Our Panelists



**Jerry Hein**  
President  
ECSI System Integrators



**Brian Morales**  
CEO  
Pro-Cal Lighting



**Jason Kreger**  
President  
Aladdin



**Chasen Tedder**  
Vice President  
Hampton Tedder

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## Strategy for Service and Maintenance



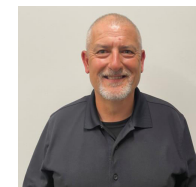
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President  
ECSI System Integrators

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## Strategy for Service and Maintenance

- Your Companies product decisions will impact your ability to do service and maintenance
- Parts and smarts jobs don't give you service opportunities
- Margins:
  - Monitoring 100% GP
  - Daily Service 45% GP
  - Inspections 35% GP
- How to get proprietary products
- Certifications needed, cost of training to keep certificates up to date
- Field work force must embrace 24/7 service
- Maintenance Contracts: Gold, Silver, Bronze
- Sub out generator, security and fire alarm monitoring



**Jerry Hein**  
President  
ECSI System Integrators

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## Bridging Technology to the Customer



**Brian Morales**  
CEO  
Pro-Cal Lighting

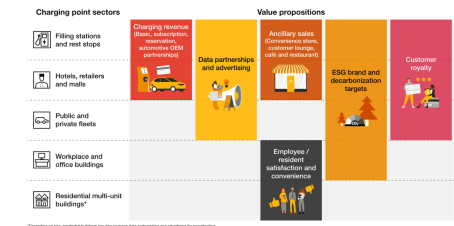
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## Bridging Technology to the Customer

- Partner with Utility, Manufacturers and Government Agencies
- Talk the language of the CFO when discussing building upgrades.
- Value to the Owner's client may mean value to the Owner.
- Why would they choose you instead of their existing electrician?
- Provide convenience for guests and patrons that can generate new revenue streams through energy sales, data partnerships, advertising and maintenance plans.

A diverse set of value propositions exist depending on the charging point sector



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## Service Mindset



**Jason Kreger**  
President  
Aladdin

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## Service Mindset

- What is service?
  - Doesn't matter what the work is, what matters is how you approach it.
- Customer vs Client
  - Price vs Trust
  - Transactional vs. Relational
  - Short term vs Long term
- The most successful service companies are true partners with their clients.

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## Service Mindset

- Every day is different
  - No ordinary days
  - 1000's of clients = 1000's of different expectations
- Do you have the stomach for it?
  - Is service in your DNA?

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## Service Culture

- Mission, Vision, Values
  - Mission = Why. Why do you do what you do?
  - Vision = What. What does success look like?
  - Values = How. How your entire team will do what you do.
- Build a culture that is desirable for both clients and team.
- Brand Everything
  - Clients won't call again if they don't remember who you are.

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## Service Culture

- Finding the right personalities
  - Confidence is different than arrogance
  - Construction culture vs service culture
- Spoil your team
  - Unhappy team members DO NOT make for happy clients
  - Care for them then show them that you care!
  - Treat them like your first crush!
  - Vans and tools are important

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## Technology Advancements



**Chasen Tedder**  
Vice President  
Hampton Tedder

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# Technology Advancements

## FIELD DATA FORMS

Before (Handwritten)

GROUND FAULT SYSTEM

CUSTOMER: *W. W. Co.* JOB NO: *10019* DATE: *5-2-23*

JOB LOCATION: *11111 South Ardena Drive* CITY: *San Jose* STATE: *CA* ZIP: *95128*

DATA

EQUIPMENT LOCATION: *Panel 1* EQUIPMENT DESCRIPTION: *Panel 1*

SYSTEM OVERCURRENT DEVICE

MAIN OVERCURRENT DEVICE

GROUND FAULT SYSTEM

SYSTEM SETTINGS

INSPECTION

ELECTRICAL TESTS

TIME DELAY TESTS

OFF PRIMARY VOLTS

OFF SECONDARY VOLTS

REDUCED VOLTAGE TEST

NEUTRAL INSULATION RESISTANCE TO GROUND

ADDITIONAL COMMENTS

After (Laptops / Excel / Word)

GROUND FAULT SYSTEM

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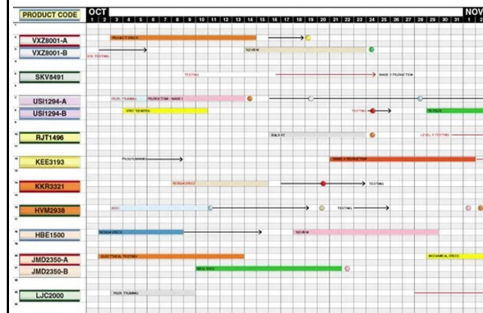
ADDITIONAL COMMENTS

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# Technology Advancements

## SCHEDULING

Before (White board at office)



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After (Everywhere – Google Sheets)

EMPLOYEE	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1. J. Doe (Owner/Manager)							
2. J. Smith (Electrical Engineer)							
3. J. Brown (Electrical Engineer)							
4. J. Green (Electrical Engineer)							
5. J. White (Electrical Engineer)							
6. J. Black (Electrical Engineer)							
7. J. Grey (Electrical Engineer)							
8. J. Gold (Electrical Engineer)							
9. J. Silver (Electrical Engineer)							
10. J. Copper (Electrical Engineer)							
11. J. Iron (Electrical Engineer)							
12. J. Steel (Electrical Engineer)							
13. J. Lead (Electrical Engineer)							
14. J. Zinc (Electrical Engineer)							
15. J. Nickel (Electrical Engineer)							
16. J. Cadmium (Electrical Engineer)							
17. J. Mercury (Electrical Engineer)							
18. J. Platinum (Electrical Engineer)							
19. J. Palladium (Electrical Engineer)							
20. J. Rhodium (Electrical Engineer)							
21. J. Rhenium (Electrical Engineer)							
22. J. Ruthenium (Electrical Engineer)							
23. J. Selenium (Electrical Engineer)							
24. J. Tellurium (Electrical Engineer)							
25. J. Vanadium (Electrical Engineer)							
26. J. Niobium (Electrical Engineer)							
27. J. Tantalum (Electrical Engineer)							
28. J. Zirconium (Electrical Engineer)							
29. J. Hafnium (Electrical Engineer)							
30. J. Yttrium (Electrical Engineer)							
31. J. Lanthanum (Electrical Engineer)							
32. J. Cerium (Electrical Engineer)							
33. J. Praseodymium (Electrical Engineer)							
34. J. Neodymium (Electrical Engineer)							
35. J. Promethium (Electrical Engineer)							
36. J. Samarium (Electrical Engineer)							
37. J. Europium (Electrical Engineer)							
38. J. Gadolinium (Electrical Engineer)							
39. J. Terbium (Electrical Engineer)							
40. J. Dysprosium (Electrical Engineer)							
41. J. Holmium (Electrical Engineer)							
42. J. Erbium (Electrical Engineer)							
43. J. Thulium (Electrical Engineer)							
44. J. Ytterbium (Electrical Engineer)							
45. J. Lutetium (Electrical Engineer)							
46. J. Bismuth (Electrical Engineer)							
47. J. Antimony (Electrical Engineer)							
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100. J. Arsenic (Electrical Engineer)							

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# Technology Advancements

## SAFETY AUDITS

Before (Handwritten)

Crew Audit

Actual Time: \_\_\_\_\_ Job No: \_\_\_\_\_

Foreman: \_\_\_\_\_ Division: \_\_\_\_\_

Location: \_\_\_\_\_

Work or Activities in Progress: \_\_\_\_\_

Personnel on Site: \_\_\_\_\_

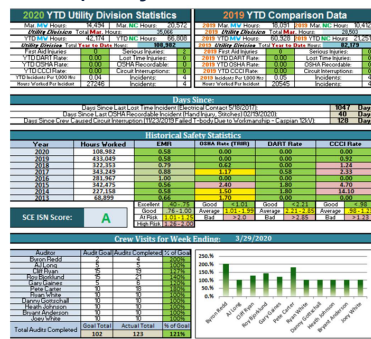
Checklist:

- ☐ Daily Tailboard Mtg.
- ☐ Hot Work (Ph. Vtg.)
- ☐ Grounding
- ☐ Contractor Inspection
- ☐ Test Power (Primary)
- ☐ Use of Hand Tools
- ☐ Traffic Control
- ☐ Test Power (Secondary)
- ☐ Use of Power Tools
- ☐ Lighting
- ☐ Associated Construction, Maintenance, and Testing
- ☐ Housekeeping and General Jobsite Condition

Comments: \_\_\_\_\_

Approved By: \_\_\_\_\_ Date: \_\_\_\_\_

After (Everywhere – Quickbase)



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# Technology Advancements

## TIMESHEETS, RECAPS, EXPENSES

Before (Handwritten)

JOB RECORD - TIME AND MATERIAL

W.O. NO. *117552*

LOCATION: *FALL BROOK BESS* DATE: *6/14/2023*

ADDRESS: *1405 E. MISSION ROAD, FAIRBROOK, CA 95022* DAY: *FRIDAY*

EMPLOYEE NAME AND CLASSIFICATION: *CHASER TEDDER - EE* EQUIP. NAME AND NO. *S-70*

RECAP: *8* PI: *4* EQUIP. HRS: *12* SUB: *50*

ENGINEERING SERVICES / ACCEPTANCE, MAINTENANCE TESTING / MAINTENANCE PROGRAM / WORK PERFORMED:

*ATTENDED MEETINGS TO DISCUSS PROGRESS, SCHEDULES, AND SCOPE.*

*WROTE PROPOSALS FOR OUT OF SCOPE WORK, EMAIL SETTING DISCREPANCIES*

*FOR PROTECTING RELAYS, WROTE SWITCHING PROCEDURE FOR SLOW GENERATOR*

*AND 400V SWITCHGEAR. SCHEDULED TECHNICIANS FOR WEEKEND WORK.*

After (Everywhere – Quickbase)

Work Order	Job	Start Date/Time	End Date/Time	Work Accomplished	Revised Date	Team	Members	Approved	Status	Signature	Signature Date	Signature Time
05-20-2023 (1 Timesheet)	VT PAULT INSPECTION AND CLEANING - TRANS	05/21/2023 08:00 AM	05/21/2023 08:00 AM	MOBILIZATION - PM		Contractor	Contractor	Pending				
05-20-2023 (1 Timesheet)	VT PAULT INSPECTION AND CLEANING - TRANS	05/21/2023 08:00 AM	05/21/2023 08:00 AM	MOBILIZATION - PM		Contractor	Contractor	Pending				

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# Technology Advancements

## MARKETING

### Before (Flyers)

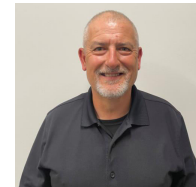
Hampton Tedder Electric Company



### After (Everywhere – Website)



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