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LET AUTOMATION SMOOTH YOUR JOURNEY THROUGH 2021

IF WE LISTEN to recent corporate announcements from Google, Microsoft, Amazon, Facebook and Twitter as a guide, then a whole bunch of people are going to continue working from home through most of 2021. That means the “workcation” and “staycations” that fueled the 2020 pool industry into a frenzy last year are going to continue through the better part of this new year.

It probably won't be as bad (as in “busy”) as 2020, but even if this year's increased demand is only half of what it was last year, it's still likely to be more than you did in 2019 and more than you can handle in 2021. So it looks like you've got another year of being pushed to your limits and drinking from a fire hose.

Now if you had unlimited manpower, you could just keep throwing warm bodies at the problem and balloon your operations up to handle the added demand. But as we all know, the extra manpower is exceedingly tough to find right now.

That's why we should be looking at AUTOMATION. 2021 is undoubtedly the year to start working smarter, not harder.

When I first got into this industry 15 years ago, I quickly figured out that “drip marketing” would be a vital part of any pool industry marketing strategy. We would need a great looking website, a tempting low risk offer, and then a series of messages that would automatically drip-drip-drip on the prospects until they were finally ready to buy.

That was a good start. But something was missing. The strategy didn't take into account any changes in the prospect's behavior.

That's when we evolved to “Phase 2” of marketing automation: Use a sales/marketing “Client Relationship Management” system (a.k.a. CRM) to manage and monitor all your leads. Now the business manager and/or sales manager could more readily keep tabs on all the prospects and all the sales activities. And with most CRMs, everything is in the cloud, so you can check the status and activities from anywhere.

But now here comes 2020 – 2021, where everyone is overwhelmed with too many leads and too much business to handle. So looking at your CRM will only remind you that you have more business than you can handle. And the “drip-drip-drip” messages encouraging people to call you, ironically, only makes matters worse.

That's why you've got to move to “Phase 3” of marketing automation: Let the prospect's behavior trigger automatic messages and reminders, rather than blindly dripping on everyone.

And let's not give short shrift to that magical word: *automatic*. Rather than yelling at salespeople and sales administrators to call more people and send more messages, you can let the system do all of that for you. From texts to emails to task assignments and voicemail messages, just about everything can be set up to trigger automatically based on where the prospect is in the pipeline.

For example, if I were a pool builder, here are just a few steps of automation I would put in place:

- An auto-reply “Thank You” email to every inquiry, letting them know how

soon we'll get back to them.

- A second email with video to introduce them to their designer.
- It would include a link to the designer's calendar, so the prospect can schedule an appointment based on the salesperson's availability.
- Automation will add the appointment to the client's calendar and the designer's/salesperson's calendar to confirm the upcoming meeting.
- Another email (or text message) will go out the day before the meeting reminding them of the meeting, and telling them what to bring and how to be prepared.
- Another text message would go out 45 minutes before the meeting once again to confirm the time and location, and to eliminate “no-shows.”
- The salesman could also be notified if and when a prospect watches a video or clicks a link.
- And *not* watching a video within “X” number of days could trigger reminder messages to the prospect to check out the video and/or take other steps.
- Further lack of action will re-categorize the prospect as a “cool lead,” so the designer doesn't waste precious time with prospects who aren't ready to buy.
- After the first meeting, an automatic “Thank You” email and/or text message is sent.
- If the “No. 2” meeting has not yet been scheduled, the prospect and designer are both reminded to get that scheduled.
- Automation also keeps track and reminds the designer when certain tasks are due, such as making a phone call, creating a design, attending a meeting, etc.

I would also set up *internal* automation, to automatically remind key people of tasks that need to take place, at exactly the time they need to be reminded. For example:

- A designer would be reminded when a particular design is due for a particular prospect.
- A salesman would be reminded exactly “X” number of days after giving a proposal to seek a decision from the prospect.
- The office manager would be notified two hours before any in-office meetings with a prospect.

Once a project is sold, there is still more automation that could be put in place. For example:

- The prospect would receive a "Welcome to the Family" email.
- They'll also get a "What to Expect During Construction" document, so the homeowner has no surprises and doesn't have to keep calling you with questions.
- The Accounting department and Construction department would be notified of the sale, including the homeowner's name, address, phone number, email and the amount of the sale. (And anything else you care to capture and share.)
- Your subs could be automatically notified in advance when you have an upcoming excavation, steel or plaster job, etc.
- The system could also automatically send invoices for various draws whenever a particular stage is completed.
- You could also automatically send out a "How Did We Do This Week?" message every Friday, so you could

proactively and preemptively uncover and resolve any possible homeowner concerns before they fester into real aggravations.

- When the project is completed, another "Thank You" email and/or text message is sent, with a link for them to give you a five-star review.
- Another email/text could take the client to a "Send Us a Video Testimonial" module that allows them to easily and instantly record and upload a video testimonial for you using their mobile phone.
- Another staged email would remind them how much you would like to meet more people like them (i.e. "Thank you in advance for sending us referrals").
- They continue to get "Thank You Again" / "We're Just Checking In" emails every year on the anniversary of the completion of their pool. (And maybe every six months – if you want to remind them of their semi-annual filter clean.)
- I would probably also automatically send various holiday greetings and/or

birthday wishes every year.

Well, that's more than two dozen easy-to-implement steps of automation, which is two dozen things none of your people will have to do anymore.

And that's the point. Let's take the day-to-day tedium of emails, phone calls and text messages, and automate every single thing we can think of. Now your people can be more productive, and you can sell more projects, make more money and maybe even retire early.

Although who knows – maybe with all this automation, you'll be having so much fun you won't want to quit!

Yes, I'm a huge fan of automation. ESPECIALLY in times like these. ~

Brett Lloyd Abbott is the founder and CEO of Pool Builder Marketing LLC (www.PoolBuilderMarketing.com), a marketing consulting agency that works exclusively with swimming pool builders, pool service companies, and high-end landscape professionals throughout the world. He is a frequent keynote speaker and leader of workshops and seminars.

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