

## Automating Your Business With Sam and Josh Podcast by Pipelineology.

**00:00:48 Gary Ruplinger**

Hello everybody and welcome to another episode of Pipelineology. I am your host Gary Ruplinger and today I am pleased to be joined by Sam and Josh Ovett from Mobile Pocket Office. Gentlemen, Welcome to the show.

**00:01:03 Sam and Josh Ovett**

Hey, Glad to be here.

**00:01:05 Gary Ruplinger**

Well, I am. I'm excited to have you. I'm really looking forward to our conversation before we jump into that for people who aren't familiar with you or Mobile Pocket Office, could you just give a little bit about your story, your background, and how you guys got here?

**00:01:20 Sam and Josh Ovett**

Yeah, absolutely, the first part.

**00:01:22 Sam Ovett**

Yeah, it's we're. We're a firm just so people understand it. That does consult and implementation of automation process. But that's the technical part. The exciting part is we're Father, Son lead firm. So, it's a lot of working together to look at your business from two different angles. The old guy that you see here, Josh and the young guy me, so we say it with a bit of just a bit of fun. But the idea is to look at your business and help you understand where you can be human, where it counts and otherwise automate. Josh, you wanna jump in for a second talk a little bit about the background of why we started this specifically 'cause it comes from different backgrounds.

**00:02:03 Josh Ovett**

Absolutely. So, I spent most of my years 30 plus years doing automation for large companies so that we're making things consistent, delivery consistent and you know, integration of different systems so Long story short, is well now that we work with small to midsize businesses or agencies or consultants, one of the things that we find is they're busy. They're too busy to work in, in their business rather than on their business. So, the idea is where can we free up somebody? And I use the statement of two things. One is the best business model is the one that doesn't need you. So, it can run and the other one we get started conversation or like OK, we're gonna go off into the Amazon and spend six weeks on vacation exploring it. The nearest phone service is 4 hours away and we go for six weeks. Will your business still be as good or better when you return? Can you actually do it? And so, when we look at things in that perspective you have to take a very close look at what could you? Remove that you're doing on a regular basis, and I'm sure Gary that during our

conversation will go through some actual real-life examples of clients and customers who we've done some cool things with that might interest your audience.

**00:03:23 Gary Ruplinger**

Thanks for sharing that. I've I'm definitely excited to kind of talk about, you know, kind of explore some of these automations, some of the possibilities, 'cause as you as you were mentioning the being off in the Amazon for six weeks, I got. I got like knots in my stomach when you were saying that 'cause I've, I'm thinking? Gosh no I couldn't. I couldn't spend 6 days away. You know I need my phone. I gotta talk to people. Gotta email I gotta be in communication and make sure you know everything's running smoothly. So that's a that's a scary prospect. I know, I know, for me at least. And I know a lot of a lot of our listeners. Probably thinking the same thing of 6 weeks.

**00:03:58 Josh Ovet**

I didn't learn it. I didn't invent. It I learned from a gentleman who for 30 years took 166 days a year off. No cell phone service, no interruptions. A room with a view somewhere in the world so I know it's been done. I learn how to do it. I did it this year I took six weeks off. No, and guess what? We're still profitable and it's still growing.

**00:04:27 Gary Ruplinger**

That is awesome. So, I'm in where do we start? What do we do, where, where? Where do we begin this journey? What should we be focusing on?

**00:04:38 Sam Ovet**

But I'll tell you what, I'll jump in there Josh and you can layer in some stories around how we how we look at it with folks, and I think an interesting little back story just to back up a second on. This is how we started this thing and where it came from. Because you know, here Josh is been doing for years. I mean I'm a son, so I've seen it for years and grew up around it. Process based. So, you know something related to process and technology put together, mostly for large businesses. For the majority of my upbringing, I went out went to college. Really enjoyed that and decided I'm gonna professionally Whitewater Kayak and guide. So here I am being a professional athlete. I had this background of all this business process stuff. And in green environmental Sciences. So, I'm learning about ecosystems and how things go together, and this is years ago now at this point, but. I think it's an interesting story because there's a lot of things that I took from my time as a professional athlete and that we've applied into this business and that Josh took from his business process years, and we've applied into the process side of marketing, so I like to talk about that because it's a unique background. It's not completely what people are used to hearing and I think if you start to look at it that way, it's a lot of fun. Josh, it looks like you've got something to chime in there with so.

**00:05:55 Josh Ovet**

Well, one of the things that you don't know about Sam 'cause we all just kind of met, is he likes to do adventure sports, hiking, whitewater kayaking. Anything that you potentially, if you're not paying attention, you could wind up in the hospital. We're not gonna get a couple of good. Scrapes, so there's a lot of risk management exactly in what he does and how he looks at things. I mean, I looked at risk management from a business perspective. He's looking at it for personal and I applied it backwards. But I'll let him talk about, you know, one example would be is, you know if you're gonna go run some. You know, if you see some pictures at a later day of him running a, you know 400-foot Cliff.

**00:06:39 Sam Ovet**

Down or like 8080 feet.

**00:06:41 Josh Ovet**

Yeah, yeah OK, you know I was 400 feet away looking at it, so it was it was big, it was rough. It looks like you go when I would look at it before when I took them to these rivers and said, look at those crazy people. They're trying to kill themselves, literally. Um and next thing I knew is I put my sons in that kind of training at, you know, 810 years old and said, OK, let's go learn how to whitewater kayak. Um, so anyway, I'll let Sam talk about his perspective of looking at something from a risk, right? And averting like you just said, Jerry, what we just told you is super scary, right? So, we're looking at a a giant River. This gushing with giant waves and saying. You're gonna get in that and you're gonna do cartwheels and you're gonna have fun at it. So, Sam. Why don't you start there?

**00:07:32 Sam Ovet**

Yeah, I like that to take this idea and apply it because everybody's done something physical that they look at and they go. Oh, that that looks risky. You know, and then they go experiencing it, even if it's in a small scale. What looks risky or scary to them, and so you take this idea, and you apply it back to business, and you even apply it back to automation. And in your case carrier to look at it and you said, hey, this is the idea of taking this much time off without touching. My business is terrifying, right? And so, we break that down we go. What are the component parts that make up that risk, right? Why can't you take that time off today? And once we break it down and start to understand it, then we can objectively identify the pieces that need to be worked on to allow you to then do the things that you want to do, like taking that time off. This is the same with the physical component of high adventure sports, right, you don't jump in and just do the hardest thing right away. You start with baby steps and you learn and you breakdown the risk and you start to understand the landscape of risk. What's objective, what's objective, right? Is its subjective risk if you actually put your phone down for six days, would your business actually have major issues, or would people just not be able to contact you, but ultimately it would actually be fine? You know what I mean? And so, we look at these pieces, and we do that in all the components of the systems that we look at for people. Because, often times some of it is, uh, as a lot of its subjective risk that people have in mind, so I can't do that right. I can't automate that, and so actually, yes you can, and they miss the pieces where they should, where they think they could automate. And it's like, no, that's where you need to not

automate right there, and we'll get into those pieces. But the whole idea here is that there's a framework of looking at and assessing risk. In high adventure and physical activity, they can be applied to business. And the thing that you're trying to do is break it down. Understand the risk at the components, and then make changes to improve yourself in a business context to the point where you can fully step away and have an automated business.

**00:09:43 Josh Ovet**

So, I'll add a framework to that. Everybody's seen an onion, right? An onion grows in layers. Smaller layers and layers and layers. Most people who are successful in business. Started out small and they added a layer of the thing they had to do or deliver a review an overtime. They've added lots of layers and now they got those big layers, and the most recent and up-to-date layers are on the outside. But what they don't do sometimes is take the time to go back and remove all the unneeded layers that you started with that are duplication. You know a good example of that is I have people I say I ask the question just like annoying little kid. Why do you do that? And you know you. Can be like a fly on the wall. It's one of the things that we do is we observe what people do and why they do it and how they do it. And then as a third party, and I always say that the best person who is the smartest in your organization is the newest one you hire. And you try to train him 'cause then you're trying. To train them how to do all the things that you want them to do. And most of that, they're smart and they're not afraid of you know, giving feedback to their boss or their manager will ask the question you know why you do this when you do it in three different steps, and you go straight line. If you just eliminate that and get the same result. In the comment would be as well. That's because that's the way we've always done it. And that's what we call a habit. That kind of is change. And looking at these things sometimes means. Looking at some of the habits processes that you do, and there are many that if you're past the age of 25, you do things. When I call automatics there, things that you've done the same way you don't even think about him. But when you try to explain to somebody. Here's what you need to do to do this job. And you try to do it step by step so they can repeat what you ask them to do and in the exact order and all that. They usually come up with them and probably at least 75% of the time of things that you do going. Wow, that's a lot of work, there's an easy way to do that, and that may because they know about a tool they're thinking about the process, or they just realized you know that's your habit, but I can do it faster and you know, go do something else and be more productive for you as a team member.

**00:12:17 Gary Ruplinger**

So, when you kind of start developing this is that kind of where you start breaking it down is, what are your habits? Or are there certain areas that you focus on 1st or as you start this, where does somebody focus their attention to begin this process?

**00:12:34 Sam Ovet**

Yeah, so I'll jump in on that one is we start with something really simple and not digital. Surprisingly, we have people print out a piece of paper That's got some lines on it, like a spreadsheet and it's called, we call it a pal or a personal activity. Logs with acronyms for, and

it's simply having everyone on your team who's involved with the different aspects of your business. Write down what they do for two or three days, just all the different things they do.

**00:13:06 Josh Ovet**

And that's where minute increment.

**00:13:08 Sam Ovet**

Yeah, yeah, everything you do an and sometimes it has to be a few more days. Sometimes it's faster than that depending on what people do, but the idea is that you start to understand what you actually do that makes up running a business right? What are all the little things that, in the context of taking time off that you quote unquote, maybe don't feel like you can take the time away from right. And so now that now that you understand what those are, that's the starting point.

**00:13:40 Josh Ovet**

You know what sucks up your time?

**00:13:42 Sam Ovet**

Exactly, what is the busy work of business? What is the busy work of business? What actually takes up your time? And then we take that I'm gonna layer this in. This is the next thing that we do for people to think about and start putting in their minds. And this is something people can do themselves. You write this stuff down.

**00:13:58 Sam Ovet**

And then the next thing you do is you look at it in the context of five different areas of your business.

**00:14:04 Sam Ovet**

Attracting, what do you do to attract new business, right? That's usually the least automatable. The very top part of that. That's the raw marketing. The creative work that's going out a lot of the times. Now that you've got that interest, how do you convert it into leads and then sales? And those two. That's where automation really can start to kick in. And then you've made a promise to people, and they've bought something. Now you've got to fulfill it. Obviously if you don't fulfill your promises, you're pretty quick out of business and then after that is where most businesses stop. But there's two more crucial ones, and that's really good businesses make a point to have processes and automation that delight their customers that help them get more utilization out of their product or service and also opportunities to upsell them to new and different aspects of the product and service that give them more benefit. And then the final one and the cheapest marketing anybody can do if they have a good product or service that people love is making sure that they identify their process for referrals. So, you have a tract, convert, fulfill, delight and refer. And if you look at the different things that you do in those stages of your business, now you have a pretty clear

picture of all the things that go into running your business, and that's and only then is where you start looking at of the processes. What can and should be automated?

**00:15:43 Josh Ovet**

And those processes are the same regardless of what kind of business you're in. So, when you drill down into those processes, you know what you actually do. That's when we get to the detail of OK, what are you doing today? What's supposed to happen? And then you know the idea of being is OK. Um and everybody seen this. Think of a series of pipes, right? Big diameter, small diameter. If you're have. A lot of water pressure and you have two small pipe many leads not enough you know way to follow up on 'em the pipe burst and guess what you're not. You're not following up on business that you invested to the bill. If you're trying to build pressure. Then you need to make sure that your pipes are about the same size. Otherwise, we've all experienced and then you know we got the shower on the third floor of the House and you know it dribbles out of the shower. Well, you know if you make the pipes the right size so that the pressure is going through them consistently. The pipes either don't leak and you get consistent. You know flow of leads, business money, cash, no matter where that end is a good example of what I'm talking about when you talk about. So, they'll give you some example. One of our customers, she is super successful. It takes her 30 minutes to take your money after you said yes, and then when that's nuts, you have somebody on the phone. You should be able to ask for their credit card, take it, and then all the things that happen. All the things that they are enrolled in, all the information they get all the processes that get started on you should just say put on this campaign and damn, it all happens and in one of those situations that 30 minutes was down to a checkbox. And guess what?

**00:17:42 Sam Ovet**

I think the other important thing that Josh is the volume of how many she's doing.

**00:17:46 Josh Ovet**

Right exactly so. Here's the real key. Is the fact that you have spent 30 minutes really wasn't a big deal to make 3 or \$4000, right? The difference is she was having to do that 30 times a day. What? Yeah, 30 times a day she was having to do all this stuff, so I took 30, 30 minutes. So, between her and her staff doing this stuff just to get the customers on board. We reduced it the whole process down to one click OK after they take the credit card. Enroll right and then all those things happen. There were literally like 20 two different things that go on right to get them involved in this course or that campaign or recurring meetings. All the things that they need to set up and manually do. Now happen with the clip. You know what is her comment was? There's an interesting comment that came from her. She called me about 3 Thursdays. Ago early in the morning. It said you're gonna laugh your butt off. Josh and I said what, she said, you know. I think I have PSP PTSD of automation. What the heck are you talking about? She said I signed up because this was early on when the 1st three or four days that we put this place I said I just signed up a new customer and I started checking all the places that I normally need to go, and they were already done. She said, you know, I was reaching. For an arm that no longer was there. That I needed to feel so it was

like. Oh, you know. And then you know. Realistically, another like 10 day 10 days ago she called me says there was a problem with one of the processes. OK, she changed a few the way she did things and one thing didn't fire. He said, you know what? I forgot that I that I forgot that I actually had to do all this stuff. I'm so busy doing all new marketing that you know; I didn't realize how much stuff is being done. In other words, how quick they for, she forgot. How she used to have to do it was like boom, it's all gone and her next time it was. What else can we do?

**00:20:08 Sam Ovet**

Decision point at this point in a business I would jump in Josh because like this is this is what a lot of the customers that that we work with experience. Is there a decision point I could hire somebody to do those 30-minute tasks for each customer and it would still be profitable, but now I have to hire and pay someone ongoing basis to do this type of work or press one of my other team members to take on more work from an area that they're not necessarily hired to focus on? And I have to continually pay that person to do this ongoing task that is process driven, standardized the same every time or I can invest once in automation. And it works always and forever, and the automation also does not need a health insurance plan. It does not take a vacation, right? And it's also a work that people often don't want to do, and they just get it tasked with in addition to what they're really there to do. And it's that idea of pipes and Josh talked about this. It's the other part of that analogy, which is its people we poured water down the pipe. It's about to get to the end. Make sure that somebody picks that pipe up and connects it to the other one so that the water flows through versus building a connector so that anytime you put water into the pipe it goes through. And you're not leaking water. And you don't have to hire some made up move the bike beach time. Again, move the data.

**00:21:53 Josh Ovet**

The name of your podcast is Pipelinology, but it's kind of a fitting thing that you don't want leaky pipes you don't want improperly sized pipes. You know you want it to flow and there's an interesting thing. If you have a business that has multiple people who tasks or processes need to be handed off to, you know you sold somebody sales marketing hands off the sales it has to hand it off to production or implementation or you know shipping whatever that might be, right? So, this is the thing that really keeps us busy. When we start with the customer and we start with where? The Leakiest pipe is right. Ken. Let's fix that immediate problem. Get that out of the way. Stop get removed. The bucket that's tripping some speak, or, you know, is about to implode. But we can always tell if we've drawn out this whole kind of 10,000-foot level and if we improve this thing right here and we increase the pressure. We know who's down the poor person whose down line from that, who is now going to have to deal with it and we also know that once that thing pressurizes this fullest working grade. There's somebody at the other downstream that's going. Yeah, much to do. So, we know where our next focus will literally need to be, because we're going to see that section of the piping right in the plumbing, so to speak. Start to experience some issues. Alright, not always, and some people have some really good solid. You know existing piping, but when you go in and do a remodel of and house a business you know you replace something with

better technology, faster, easier, smoother. You know larger flow there's bound to be something downstream that's gonna burst, break or stop, you know. Um, it's plumbing, you know when, as I jokingly say, sometimes you know you have an expectation when you press the lever that everything flashes. You know it should just go smoothly from that perspective. But you know the interesting thing, I'm sure that everybody is saying, well, that must be expensive. You know so. You know it takes a lot of time, a lot of money on injury it to make things simple, it does take energy in time. OK. But in most of our customers, we might be, and I and I'm accused of. Hey, you gonna come in and replace my employees and like no I'm gonna release them from the boredom. OK and let. And if they've been with you for a while, they know the quality of what you're working, what you're doing. We're going to allow them to work with the people that they've developed relationships or help them talk to people who need help, where a computer can answer a complex question or a hey, could you tell me why this would work for me? Computers not gonna do that it, you know, if that's not your business. But the idea here is that we take people and put them in the human. Part where it's important, when people say, you know I talked to Andrew and man, your team is awesome. He helped me solve this problem showed me. Exactly how to use this? Properly or how to do this properly? Um so, but the answer from an investment standpoint is this. We find that most of our customers who have people they pay between 30 and \$50,000 a year with all the overheads and benefits. That you know over a five-year period. That's three to \$500,000, and you can replace a lot of stuff for less than one year's worth of salary. And that's a good investment 'cause you never have to pay that again, it's totally diverted, so there's a huge you know. I won't say there's 100 to one investment. You know? Anybody who has 101 investment will buy that every day. But you know, if you can get 10A return of 10 or 15% over multiple years from investing something most people can't get that in a day-to-day basis, not even in the bank. So that's kinda where we look at is OK. Are you going to invest, you know, do you have? Do you have more business than you can handle? OK. If you can't generate business, one thing that we don't do where when we know how to market. We just don't do it for others. When I say marketing advertising, why? Because if you're spending money on advertising, you gotta have somebody who's specifically watching and managing your pocketbook. Otherwise, it will go out the window like dumb, you know, in a in a hard. But once that advertising comes in. And we're in tracking it. And you know, if you're doing targeting, me and you, automate that so that those who are already customers don't get retargeting, not spending money on somebody is already a customer. That we do so will help control the valves of spending. But you know the initial hey we need to create a Facebook and do something for the Holidays. Right? No different than that was my that was my morning job. The 7:00 this morning I had to create a 90 second promotion for something that we're doing as simple as automating handwritten letters in volume. I'm giving away just, you know, on your people here this on Thursday. If you don't want to write a handwritten letter to any of your clients to our family. I'm giving away 400 a hundred 100 letters right will be automatically handwritten. I'll even give you the sappy words for it. OK, it'll go out with a Press of a button. That way you can say thank you. You can say happy anniversary. Why do we just do it? Say when was the last time you wrote handwritten letters to your clients to say Happy New Year and this year particularly, we all need it.

**00:27:40 Gary Ruplinger**

So, you're automating handwritten letters. I gotta hear this. I gotta hear this. How? How do you do that?

**00:27:48 Sam Ovet**

Right, so let's back up. Could you just jump right in and there's a little bit of a context piece missing here, yeah? OK, got it. Needs to be layered in. Yeah, you know, this idea of being. Human, where it counts an otherwise automating right? What does it mean to be human, right? It's the personal touches. It's the things that we all believe or commonly recognize that if somebody puts thought and energy into my problem or the experience that I'm having with the company that usually feels pretty good and makes a pretty strong connection and also makes me very likely to refer your business. And be lonely. And be loyal. So, we look at that and we go well, what can you do and how much of it? Can you automate? While still retaining the personal field so that is where this is one. A common tool in the toolbox of being human where it counts always automating where we can tie someone's automation system into a service that automatically at the right stage in the customer journey, sends out a hand a handwritten thank you note. It literally looks handwritten. I have one here.

**00:29:08 Josh Ovet**

And it's got a stamp in the envelopes, postmarked.

**00:29:11 Sam Ovet**

Comes it comes like this. I have one in my desk as I we did a Webinar about these recently and it looks like that and then the card itself can have this as an example. It can have anything you want on the front. And then this is the level. This is what it looks like. I mean, if I showed you this, does this look handwritten to you?

**00:29:35 Gary Ruplinger**

It definitely does, and if you're just listening to the audio feed of it, basically what Sam is showing is it's it looks very much like a letter with a logo on the front, and as I'm looking at the text to this. Sorry, I can't. I can't tell the difference over a video feed if that's not if that's not real handwriting.

**00:29:56 Josh Ovet**

So, Gary, I'll tell you a funny story. OK, I was preparing. I'm preparing some cards for our customers and family for New Year's right and I sent the test 1 two me, I wrote the copy. And I sent the test one to myself. I don't have it. My wife threw it out, but she opened it up and I was in the kitchen just, oh, you got a letter from somebody. You know 'cause it was a thank you note from somebody and she's reading it says Dear Josh and you know; he says they wrote a really nice handwritten letter. He said what is from you. Because it was, you know, from To Josh from Guy said. What I don't understand. And I said, yeah, you know it's a Handwritten letter that I ordered with the Click of a button. And it merged in anything that I wanted from my CRM system to personally say thank you about the product and service

they bought and how wonderful I appreciate their business. And I look forward to it. And by the way, if you want to refer a friend. Here's a code for them for a discount so you know the handwritten. You know with who? We're all stuck at home these days. We go to the mailbox. And guess what? Here's a simple concept. Everybody on this podcast, including you Gary, have bought something online from someone a bunch of times this year. OK, and you get this email says thank you for your order.

**00:31:26 Josh Ovet**

Nothing, yeah, or here's your invoice page, right? Just imagine we have people who do this. Every time somebody buys something that they're shipping. What do you have your address? Their name? We can automatically send them a thank you card says thank you for buying our product. We really appreciate it sign Josh and Sam is, I mean. It's just one thing you go. Wow. You know it. It said you could.

**00:31:54 Sam Ovet**

Take it a step further. That's pretty much fully automated. You can take it a step further and add even a more human element in it where you write a note that then merges into the rest of the letter. In context, automatically and you would get a task out of your system that assigns you time to write the note at the time the purchase took place. So that you did it on time all the time for every customer and you had a consistent experience. And then I'm going to take this a step further. You can then what we have to do is in this context this example track. OK, you're gonna send handwritten thank you notes. Let's try at least two different styles because what's your goal with these? It's just said thank you and mean it and do it in a way that looks fully human and the other aspect of it is to help you get more sales right? You're doing it one because it's a nice thing to do, but too, because you're hoping that it will return and more repeat sales or referrals. And so, using physical Mail, where would it help people track if it is actually converting to more sales by split testing physical? Letters that are going out automatically from your system, like that's where you take it to the level of automation and tracking and looking at using that human touch to make the difference.

**00:33:27 Josh Ovet**

And then if you really want to get fancy so. Running down this example but one after another. But we have one of the services that we use if you want to send a gift card from Home Depot from Starbucks from Lowe's, from Costco. Any of those have a gift card. It will automatically put a personalized gift card inside that. Note that you personally sent. That isn't that freaking cool. And you don't have to worry about. Your credit card. You know hi, thanks for your help. Buy yourself a Cup of coffee. Here's a \$5 Starbucks card. You know you're getting a handwritten note with a gift, a gift thing, you know. Let me let me. Put a little context to this. For 40 years that I've been in business, when everybody spent any any customer that spends \$5000 with oh, I sent him a pound or the most expensive chocolate toffee there is in the world. It costs more than Prime rib and it's \$20 a pound. OK, so I send a thank you bye. I've always sent a thank your box of chocolate. Well, our system knows when you spend 5 grands if amount over 5 grand send email to chocolate manufacturers send out box with thinking though and it just goes to them. So, we've always used ways. I mean my

assistant used to do that. Now the system does it and it does it every time and I don't care if it's the same customer. I remember one of the customers said to me, you know, Josh, I love this coffee. Um, I just instead of eating it, I should just slap it on my thighs. You can't stop eating it, so the idea here is if you're gonna do something consistently right. And all of us are good entrepreneurs we get busy. We get distracted. And I'll use the common is, you know, in the days of your when you want to trade shows, you pick their cards and you told everybody, hey, give me your current. I'll send you some stuff and then you know the card sits in a bundle of rubber bands in your left-hand corner drawer two there 2 doors down. You pull it out three weeks later and you go. I'm embarrassed to send it 'cause now I'm like a month later I met you, so you never do anything with it. The idea here is timeliness, right? Um, you know people these days, you know if you don't respond to somebody. You know, in a short order. Usually, especially if it's an online relationship beginning. They're off to somebody else. So, you know what sets you apart. Getting something personal, getting some kind of response. Getting in their Inbox, or in this case getting in their mailbox everybody's home today. You know and. You know everybody like I just look at this way when you get a package from Amazon, they let you know and you can't wait to get out to the mailbox, so you'll get that. They just letter the same thing. It's a nice surprise, anyway. Let's kind of keep moving along the automation thing. I just we just kind of described one little piece of being human. But automating some of that thing so it's helpful to you and being personalized.

**00:36:36 Gary Ruplinger**

I like, I like the example, though I thought it was. It's kind of fascinating use of taking human touch. Still just making sure it stays consistent and I like I like I love that idea that you actually get the human benefit out of it. Well, reducing the amount of time spent trying to do it's sort like I think that's always the balancing part, right?

**00:37:00 Josh Ovett**

If you'd like. Me to describe kind of an automation process which since you said that you're the audience out there, your consultants, your businesspeople, your agencies, you probably do things like talking to somebody on the phone, making a proposal, taking, you know, deposit. You know, maybe signing a contract, right? And having to get that done and then starting them through a you know. Implementation process or consulting a weekly. Or, you know, a scheduled weekly or scheduled recurring call to work them through a coaching scenario. OK, let's talk about some real-life stuff. OK, so. You know I'm going to use this one. I had a woman coming to me and not women. She says things are going great. I just don't have any more time. You know, can you fix this? And like what? Just I want more time back. I want you know I want my life back I'm working on it. So, I said, you know, let's go through this process and we spent four hours together. Just kind of sketching it out. I mean, I asked her to bring him to the table. We schedule this, you know, a drawing OK, can you just kind of draw out a little bit about your process? Ann, when she sent me the picture and your viewers can't see this, but it looked like a football play. You know with you know lines all over the place and then she says that's my process and I went, OK, will you explain it? To me, 'cause I was like, you know, there's a flea flicker. Or why, you know I? Could tell you

know, because she had layered on every single one of the arrows, indexes, and boxes where it goes, and I saw the final result was like OK? So, I said, yeah, it looks like you got a lot going on. So, let's talk about that. So, as she unpacked, what she did step by step, I made it into little swim lanes. OK, this is the process. Then you do this. Then you do this. Then it goes the next Lane, and they do this. They do this and this and she looked at it went. Yeah, that's exactly what I. Do those are all the steps that I do? And we counted them, and they're like 95 steps to do something. And said, OK, you know, let's start at the top and let's start working through what you actually do. In other words, here's the steps. So, I sent him a contract, OK. That means you gotta prepare one, fill one out, do to do now all of us know about little pieces of automation. Like you know a sign request or a doc you sign or something like that. But I said, OK, let's. My idea is let's eliminate it. Let's let you just. Check off a boxer. Once they pay that just kind of happens. So, the first thing we started with is, OK, you know she doesn't sell online. She literally has an appointment, and she sells and then they do this consulting. So, the first thing that we had to do was she was getting leads approximately 30 to 40 leaves that came in through a Web and RI automated webinars. So, she did Facebook to web and are getting leaves and going to appointment. Should have these appointments every day. They fill out a form to make the appointment and then she would have a second page. They would ask about 10 or 15. Questions to not qualify him but have a better discussion. They already knew what they were getting into it, she wanted to some details. So, every day she was having a copy and paste those 20 or 30 questions into her searam. OK, no. So, she got an email from account only you know. So, she had some automation Facebook to a web and R2 account. Lee appointment to a page that took the questions. Then she had a couple of questions in serious CRM system. And then she had to make the call and then you know, start getting answers. You know more details as she calls. She took notes and then once the person, so I eliminated all that. Now it was from December from the Facebook to the auto Web and R to the call to the questions. It's already in her. Database and she gets an email with a link with the appointment set on her calendar automatically. Shouldn't have to set appointment anymore with the link to the database records, so when she goes in there has the calls you press the Lincoln up. Browser screen now she just types the notes. Amazing, you know that that alone was, you know, a time saver of copy and paste, and she has literally said I don't remember doing that anymore. It's just a breath of fresh air. It's OK.

What's the next step? Says when they say yes, we took the approach of let's talk about how we make more money first. Rather than save time. OK, what are you gonna do? Well, I take their money. I said how you do that I say go into QuickBooks and I type in all their name and the address and everything again and I charged it. Take their car, not charge it. Then they get a receipt and then I put their name into the CRM system and make sure that you know and then add them to this. That and the other and I send. And then I'm gonna do a dot E document and then I sent him a contract that. Before they actually are get enabled in our systems, we have to have a contract sign. So, I send this contract. I use an electronic signature. I have to re fill in all information and then send the contract and wait for them to get back or put it on my calendar to remind me that when they've gotten back to me or not as I OK. Let's just take care of that now I'm talking after this is a long discussion, but the answer is OK, so. You now let's only your CRM system and ask them for their credit card.

Now it's attached to record. They get a receipt. It's all automatic, bam, OK and you get it, and you know it is what success looks. I'll send you a text says charging you have money, right? So, it also sends you money if their credit card saying searching if it failed. So why on the phone with them you don't know right away if they. If it, if it processed. You know, then you know that was just a good warm feeling. So, the second part was OK, so now you're taking the money and you're gonna tell him on the phone that you're going to send him a contract to sign. And you fill in all fields that you need to, and you just checked off send contract that so now the contract comes in. In her case, the contract validates all. Feel that you know she had like 12 or 15 fields. There's a lot of information that sometimes she forgot, so I made sure that all got validated was all filled in before you said the blank contractor missing stuff to a customer. And then what happened was after that validation said Yep, it's ready to send it actually sends it if it's all filled in or if it did not, it will text you and say you know you miss something. But in the meantime, um, it will send her the initial contract right away. I mean like within seconds in her email and she can just review it. Make sure everything spots on and she wasn't working too fast. Then make spelling errors. We all do that. I'm a big comforter, I can, I can't, I I'm a two-finger typist, I can spell it. I'm always misspelling. So, you know, she got to review the contract and then she just clicks. I approve and it automatically gets forwarded the customer, the customer gets it within seconds, right? So, this is we're talking about a minute and 1/2 while you're on the phone. Just talking to somebody. Customers now got the contract. They can sign it, it automatically gets, you know, the customer gets the E signature, it automatically. The contract gets stuffed into the CRM system, so she doesn't have to look in yet. Another system should have asked to reference it and it says when they completed at what date, and if they've done multiple contracts, you can see the history of 'em and click on it and review them OK. Loan O2 systems, all of it's all in one bucket. Then, once that's done in the contract aside, that automatically kicks off the rest of the enrollment process, so that kind of gives you an idea how this evolved. First thing was that they had to get put into their learning management system, their project management system Alert, who's the coach who's assigned to them. Um, send a thank you email to everybody, distribute all their emails and passwords, and access to the systems, and then put them on their weekly coaching call like repeats every Monday, Wednesday, and Friday. OK. Now that's done. All within 30 seconds just by putting him. On the enrolled campaign stuff. OK, now because she has a 10-week program that she runs through and she does this individually or by groups, mainly by groups, you know she has a cohort of 10 or 15 people that come to the training with one trainer. Um, the trainers used to have to send out the Monday, Wednesday, Friday reminders. Hey, don't forget. To come to Buffalo. Block so now they automatically get reminder there are people don't have to do that anymore, that people don't have to look up information. It's already set up. Hey, you have a new customer. Get in touch with them and we even did it with their employees where? The system sends out an invite. The first invite for the introduction call to the. Coach that they're assigned to. So, they paid the Money they set up in the system. The last one this hi this is Trisha and I'm going to be your coach and years I Calendly so you can make a link and we can book our first call to as an introduction. So, all the things that she had to rely on. Her team who are super busy. The consistency of just the front end of getting people into the system. Row improved by almost 40%, no errors. It always happens. Now. Automation

does occasionally fall apart. So, what we do is when everything works, works. We sell that yeah, yeah, go ahead.

**00:46:34 Sam Ovet**

Why does automation fall apart because it doesn't fall apart? Just randomly so? Oh, because I think that's very important to address 'cause you're gonna throw that out. There we go. Why would I invest in automation if it occasionally falls apart?

**00:46:47 Josh Ovet**

OK, you wanna take that? Or should I write?

**00:46:51 Sam Ovet**

You can run with it you can look at it.

**00:46:54 Josh Ovet**

Well, part right one is the person. Who's designing the workflow? Forgot a step. Or a customer changes their process and forgot to tell you. To make a change, K or, let's be realistic. Sometimes the Internet goes out. There are outages, and one system doesn't talk to another. K in some systems. That only send the request over never confirmed they got it; you know, like it's like a telephone call. You called me, but you never left the message, so I don't know you called. So, the idea here is on certain types of processes what we do is we close the loop, especially if they are complex and you know when you get really comfortable when you say oh it's all working, and I don't have to do it anymore. One of the last steps in this particular process, since we send a confirmation email that says everything's been done if something didn't work for some reason, here's exactly where the problem was. So, you can go in if you have to. Actually, you know if one in 100 times you know, maybe the Internet was out, or one of your service. We had this case the other day Trello, right? A WS went out. There was a Zapier. I'm just I'm getting in the weeds here, apologize. But you know the signal went out in Trello. Trello wasn't available, it wasn't set up at that time to retry, you know, hey, I didn't get a response. It waited 30 minutes. The outage was like for two hours. And you know eventually, my system sent a note and said couldn't reach Trello. Could they go back in there and just fire off that initial one redone? Yeah, 'cause they were all built in components, so we just chain them altogether. But hey, this one's missing. Just restart, just send that once again, boom, it's done. It's not the end of the world, but we did close the loop and say, hey, guess what? This. Peace didn't happen. Check on it.

**00:48:47 Sam Ovet**

Alright, and that brings up another important point is that when you make automation, you should document what you're doing so that you have documentation of what you've automated is because we see this occasionally, we put automation in place for people. It's beautiful, they love it, and then they get all these new ideas, which is great. They go at it 'cause they've learned a couple things about their system and then they cause what I call an automation avalanche because they didn't check their documentation. Look at it,

understand what they had in place and that using similar triggers or tags or things in the systems could also accidentally. Fire off some other stuff. So, one thing word of word of the wise, when you build automation documented train people on what it is and say you're welcome to create beautiful new processes and try new things. Just check the documentation first so you don't cause what I call an automation avalanche.

**00:49:48 Josh Ovet**

I'll give you a story which is interesting. I have customers who have been my customers for 30 years. Larger companies those most. You know Fortune 1000. It's interesting 'cause over the years people turnover its director's automation. People just staff turns over it. You know where they get promoted or given the opportunity to work somewhere else successfully, you know, AKA fire.

**00:50:15 Sam Ovet**

Well, he goes on right.

**00:50:18 Josh Ovet**

Here is what usually happens. Because of the way that I've done this, and most big firms do this, most small firms don't. We have an automation map, you know, is there is a documentation of all this stuff. And so, I'll get a call from whoever is in charge at the moment and say, you know, you guys and your team built this. We need to make some changes and I say, let's workout the map and look at how it works today. What part are you going to change? An where that we know if we make the change, what is the downstream we talked about this pipe? You know the whole typing thing. What happens if we change this water? Oh, you didn't put an outlet. It's going to fill up your basement, oops. And so, when we do this with small, midsize business or agencies, we actually have a map that you should follow. And when you're gonna make a change, look at your math. It's gonna tell you how your plumbing put together. And if you divert it over here. That it breaks. I'll give you a very simple example which is kind of interesting. One of our customers we did too, took on two years ago. Very has a quarter million customers, they do some really wild stuff. Totally online consulting and business. And he also wrote a bestselling book, but that's a different story. We were reviewing their processes. They use 96 pieces of online software. To run their business.

**00:51:40 Sam Ovet**

Are you gonna name? Because people can go experience. This is called Master mastering diabetes.

**00:51:45 Josh Ovet**

They actually talk about us on some of our videos. Will put some links down below. You can talk. We can look at that, but one of the things that we did is they went from 96 pieces. We documented how many different Internet things they use. You know 'cause there's a cost in the learning curve and the integration. When we were done, they were down to about 30

someone. OK, so there's a lot of things we streamline. OK, just from a how does this work perspective and utilized as much of any tool that we put in place. The second part, which I thought was funny when we did this automation on it. You know that. And I talk about peeling back the layers of the onion thingy that I mentioned earlier. He was telling me Cyrus was telling me with this amazing tool. They were using those generating 3 to 500 new leads every month. Now it's really inexpensive. It's like 20 bucks a month and, however. It worked; it was magical. And I said holy crap, you know I need to sit, you know you got my interest up there, what is it? So, he showed it to me, and I said I want to see these reports again. Reports to show you how may lead you got. So, we went back in the current month and there was nothing. We went back another month and it was nothing another month. So, it happened to be March when you started. So, what happened was we went back to December I said Oh yeah you got three 488 so you know almost 500 leads. She's yeah, you know, we get about a 30% conversion and each one of those conversions worth 3 to \$5000 or some large very it wasn't \$39.00. Does that make sense? I was like that's a money machine. Wait, stop. Is I don't know, I said let's make sure it's plugged in.? Check your credit card. You know what it's paid service. Said it was working. We look back couple runs like a charm and now it was not working check your credit card. Guess what credit card expired? Oops, oops, you talk. About 1500 leads to 30% conversion, 500 sales times, 3000 bucks. You can do the math. That's a lot of money. That was a lot more money than any of our charges to do the work we were doing for an entire year, OK? We found one thing because of our audit and he flipped it on, and things started working. But I look at it this way. That is a failure of the vendor who does not tell you your credit cards expiring. They didn't get the revenue and unit. They didn't get the referrals or the happy customers. So, you know, some techie guy and I don't, and you techies out there don't take offense. I'm a techie at heart too but build something that all of a sudden you know the credit card stopped working. You don't get revenue. The customers get satisfaction, and you know what they do. It broke or they leave and then go somewhere else, so they forget about it and we're on this Internet online world thing. And if you don't have a way to know when something of your 90 Some odd tool stops working. That could be important, especially if you know there's supposed to be a handoff from 1 to the other. And so you know, that's that. That's one of the first things that we do is, you know, along with the PAL thing our mapping, you know our customer journey, mapping of how you worked is, you know. Once you're on it, what are you using? Um, you know what does it do for you and you know, is there a better way to do this? You know, in some take cases or less expensive way to do it, you know. Does this tool integrate with anything else? So, it's kind of a holistic approach. You know, like bringing your car to the mechanic and saying, you know, occasionally doesn't start. And you say what the first is? You know what's wrong with it. Oh, you know how to diagnose. It will take a little time, but you know the last questions. What does it happen often when it's cold or when it's too hot you know? Does it happen every week or every day? You know, and then you know you've got to diagnose what. Why the car doesn't start, and Gary I know about. You, but I brought my car. To service many times of the many cars too many I don't. And every time I bring it in. So, the thing I have a problem with. They say you know why we were under there; we notice. No, your ball bearings are leaking your alignments out. Your tires are bad, your transmission is leaking, and you know while they're in there and you have a choice. Fix it or you know decide when you meet, when it might, how long I how long will that last? Me

'cause I gotta wait till the next? No check or you know it's you know I'm getting rid of the car. I don't really care so. Those are the types of things just like we bring a car in or any type of thing in for service or an audit. So, to speak. You know it's helpful when somebody says. Did you know that this is here? Yeah, you want to talk about. What that looking fix that problem process? Error and then you know it's a conversation. We're not usually operating as a break fix company. Um? I've had a philosophy for many years. And people laugh at me for it. It says we don't provide any service. Your stuff never breaks. OK, in other words, I don't wanna phone I. I've always had a bonus system in place for. All of our team members if you. Deliver stuff to a customer. And it and my phone rings. Because there it broke or is not working because that's who's phone is gonna bring minors. And you know the point people. Then you're not gonna get a bonus. It's really simple 'cause we give a project bonus for everybody you know a significant one. So, the idea here is taking the time to do it right. Figure out where it might break. Make sure you test the darn stuff. OK, put some pressure in the pipes right now occasionally. Something will leak. You can you make an adjustment but do it before you hand it over the customer and they come back and say it's leaking and then we have to make a service call and then we get it, and you know what? It never happens at a good time. And Gary, I'm sure that you know you have you have business and I'm and all you folks out there who are coaches, consultants or agencies that provide a service that you do something. When a customer calls and it's Friday night or Saturday afternoon or Sunday while you're in church or whatever, that may be, do you ignore the call, or do you interrupt everything you're doing going? What happened right? There? Usually not calling you to tell you they made \$1,000,000. You know, yeah, but it's. Not usually cool. It's like it's stopped, is not working, an error occurs, or I can't get in the system. So, one of the things that if you take the time to test right and you take the time to train your customer how to use whatever system they are and get them used to it. Guess what? You know? I can say this. When Sam was younger and learning to drive, I gave him the keys to my new mini manual, and I had trained him how to use a stick shift. I don't remember was the first day or whatever day it was. I got a call. Oops, I had a little accident. You know and then I wondered why the one day and this is a whole other story won't go down that route. I wondered why that my mini that only had like 4000 miles on it needed a new clutch that should have lasted. 25,000 miles. Boy, that was some fun stories. But you know, people do things with your services in the product that you provided that you didn't intend to, and then you have, uh, you know, unplanned consequences that you have to deal with, so that's part of looking at automation. Is thinking through the whole thing and not doing what I. And yeah, we have a video out there on a website. It's called. Don't be a cowboy. Oh, I wanna do something and you know you just kind of jump on your horse and ride into the sunset. It doesn't work that way.

**00:59:56 Gary Ruplinger**

Yeah.

**00:59:57 Josh Ovet**

Gary, what else can we help you with here for your well?

**01:00:00 Gary Ruplinger**

I could sit here and talk about this stuff all day with you guys. I find. I mean I find this stuff just absolutely fascinating, but I'm sure other people have places to be, and probably this probably good place kind of wrap it up so if somebody does want to explore this further and kind of start getting. More in the weeds with it and really get into it. Where should we point them or where should we direct them so they can kind of get into your world?

**01:00:26 Josh Ovet**

So, um, what we did I had Sam made this and it'll be ready for you by the time the show goes out. [mobilepocketoffice.com/pipelineology](http://mobilepocketoffice.com/pipelineology) we actually. Want you spell the whole thing out?

**01:00:42 Sam Ovet**

Really well, yeah [MOBILEPOCKEToffice.com](http://MOBILEPOCKEToffice.com) so [mobilepocketoffice.com/pipelineology](http://mobilepocketoffice.com/pipelineology). PIPELINEOLOGY just the name of Gary's podcast here, [pipelineoutlook.office.com](http://pipelineoutlook.office.com) code slash pipelinenology that will put some resources on there that people can go and get for free to get themselves started with understanding how they can be human where it counts, and otherwise automating because you gotta start there. You don't start with automation as we discussed here, you start with understanding your process and then you figure out what you should automate first. So, we'll put that up there for free and we're excited, yeah. And then the other thing is, if people wanna just get in touch with us both [pocketoffice.com](http://pocketoffice.com). Tell us if you feel otherwise, we feel like we've done a good job of a big old button on the front. This is book now, so if you wanna talk to us and have a conversation, we'd be happy to chat with you. But make sure you carve out some time. 'cause we're, we're long winded. Sure.

**01:02:00 Gary Ruplinger**

Well, gentlemen. Thanks, thanks so much for coming on today. I really appreciate you doing this, and I really appreciate kind of sharing these insights into automation for everybody. Yeah, any parting words before we jump off here.

**01:02:16 Sam Ovet**

Figure out how to take time off from your business through automation because you live once and then you die. So, make sure that you're not just doing business stuff.

**01:02:27 Josh Ovet**

You anybody who is an entrepreneur that's listening this program. If you go back to why you want to be an entrepreneur so you can run your own life and do what you want when you want it, take time off. Enjoy things if that ain't what you're getting. You know the myth of being an entrepreneur means you build the business that you can have relieve. That's not being an entrepreneur, so you know some of the best books that I've read are, you know you build a business that doesn't need you. And if that's the case, you can also then sell it when you're ready to stop and somebody else will then take over so too many of the people that I've seen don't understand what I call the entrepreneurial time system. And here's a parting thought on that. This is actually a real thing. Um, every day you take off and don't

get interrupted. Don't answer the phone. Do anything else. You get 2 days of whamo power. OK, so if you want to be super productive take. You know everybody knows this lately and you've. Done it before your past. It takes a couple of days off. You come back, supercharge, there you go. But the idea is uninterrupted time so because the longer you. Go before taking a break. Your productivity, your creativity. It starts to go down. You know the window where you're fighting yourself every day and you know. Think about it, if you get sick and you can't answer the phone and you're off for three to seven days 'cause you got, you know, hopefully not. You know, like current flu and all that stuff, but you just not feeling good, you know, watch you know. Just taking time off and then you come back, you refreshed, and you literally get a jolt and NRG. And that's the idea of an entrepreneur. Time system we can talk more about the attack.

**01:04:18 Sam Ovet**

I know yourself out of a job.

**01:04:20 Josh Ovet**

That's right, find your way, take. 166 days a year off and not be afraid of it.

**01:04:30 Gary Ruplinger**

That's awesome. Well Sam Josh, thanks so much for sharing today. I really appreciate having you on the show. And yeah, we'll make sure we share all these resources in the show notes, and we have to have young again sometime, but until then take care guys.