

Sam Ovet, Founder of MobilePocketOffice.com by Minding Your Business Podcast

Ron Brooks: Okay. MYB community. Thank you so much. Back to us episode 213 of the Minding Your Business Podcast, entrepreneurship, real estate, trending news. There still no business like mine in your own. We are, there's no reason why October needed the fly by this fast. I mean, as slow as 2020 as been going, we just, for some reasons just flew through October.

So we're recording this October 26th of 2020 in our glorious, uh, new social distance and quarantine life that we're all living. We're heading towards, I guess, month eight, I guess, of, you know, of all of this. And yeah, we'll see kind of how things are rolling. Um, I know you guys have enjoyed the, uh, presidential debate and all the comedy that those bring, um, and maybe you've had a chance to do your early voting, um, who knows what election day is gonna look like, but I hope this finds you well, and I hope, um, regardless of any of the outside noise, that's going on, um, that you remain diligent and focused.

Uh, on your goals and what you have to accomplish, you know, whatever happens in the white house, whatever happens to the guy you've been arguing with on Twitter all day, um, whatever happens with anything that's on the news and you know, who comes with the vaccine and all that type of thing, just know that, um, through that all you've endured so much and you can continue to be great and remember, you know, always be great for yourself, for your family and your community.

Okay. Subscribe to the podcast. Five star five star wars. When you get your pods helps us to continue to grow the MYB community. And of course you can always connect with me@championronbrooks.com. Listen, I'm excited for a tremendous guest. We had a chance to talk off line a little bit. Um, so I got a really good, uh, kind of flavor and rapport, uh, for our guests today.

Sam Ovet, who's the founder of mobile pocket office.com. That's mobile pocket office.com. We're going to talk, um, you know, about his background. We're going to have a little fun with that kind of his, his rise, uh, you know, up to what he's doing today. Uh, we'll learn about, uh, mobile pocket office. Um, And we'll talk a little bit about automation, which I think is something near and dear to all of our hearts.

For those of you that are, are building your business or looking to build your business at some point, these are the type of resources and content quite frankly, that you want to have because building business systems, as we've talked about, uh, is tremendous to, you know, actually having, um, the, the type of business and the type of organization, uh, that can really support your lifestyle and allow you to really expand your reach without your direct effort or your team's direct effort, uh, with every single pimp point.

And so, Sam, listen, I can't thank you enough, man, for joining. Um, you've got some interesting whether they're going on in Colorado, but man, thank you so much, man. I appreciate it.

Sam Ovet: Thank you. I'm I'm delighted to be here and, uh, and delighted here in Colorado, just a little backstory that we went from. Being on the edge of our seats this last week with wildfires raging, the closest one was six miles from her house to a, about a foot of snow outside.

I'll actually, I'll actually turn my computer around and show everybody because it is like it is, and it was okay. My wife and I's anniversary on Friday is the best anniversary. Yeah. If we could get, you know, a bunch of wet snow is like, I couldn't think of anything better. So we are, we are real happy here.

I'm so excited to be on here and share, share what we do. You know, what we talk about with people and what we help them with. So, yeah. Yeah, absolutely.

Ron Brooks: Well, first of all, happy anniversary to you and your wife.

Sam Ovet: Thank you. Thank you four years.

Ron Brooks: Excellent. Excellent. There you go. Ben, just rolling right along. Um, and then obviously a good call on the snow that helps quench the wildfires.

I couldn't imagine them being six miles from my house. That's insane.

Sam Ovet: It was the first time we bought this house in June and it's the first time I've been that close to a wildfire, the, where it had the potential to, to with the right winds impact us. And, and I think actually we'll talk about later how automation, uh, actually put some of the things we do at ease from a livelihood perspective when that stuff's going on and kind of raging around you.

But, uh, it is an experience that is sort of just a low grade stressor over your shoulder. All day long till not till those way. And you can't really do anything about it, you know, except for a little bit of maybe volunteering, uh, to, you know, go out and dig fire lines, which I found out later that you gotta be certified to go dig around.

I'm like, I'm a healthy guy. Like I'm, I'm like, sign me up. I'm going to walk out there and I'll be happy to dig some fire lines. Like, just tell me what to do and you know, what can I do? And it says, it turns out you have to go through a training, which makes sense. And, and so that has me had printed out here and then we'll move on to some things you want the volunteer application.

We're like, well, what can we do? You know, we're just sitting here thinking about it. It's nice to at least be productive in the community and be helpful. And so, um, and you know, in a perfect world, we have automation running business stuff, so we can go out there and do that kind of thing. Of course. So that's what's happening here.

So that was a unique experience. You're kind of opening up with that is it actually made me think about a lot of different things we do for automation and how valuable it is.

Ron Brooks: So yeah, absolutely

Sam Ovet: one last thing, besides it can't hurt to have to pass a physical fitness test once a year, you know, it kind of keeps you yeah, right.

Ron Brooks: Yeah, exactly. You only gotta be checking in that health as well. And so making sure that you stay in tune with that is, is definitely, uh, another plus, you know, for sure kill two birds with one stone with that. No doubt. So, Hey, uh, so Sam let's, let's get into it. Um, yeah. So for those that aren't familiar with you, I guess, you know, kind of specifically tell us about, you know, your background and kind of, you know, your journey to get to, you know, to where you are today.

Sam Ovet: Yeah. So with the, you know, with mobile pocket office specifically kind of bringing it up to that journey, obviously that's not what I've done since I was birthed. There are other things that add up to that, right. It's not a linear linear path. Right. Um, you know, one of the things that I was fortunate to have and I'll tie the sin is that my, uh, father Josh, and he was also not my business partner in this business.

Um, and I'll, I'll talk a little bit more about back, cause that's really fun, um, is that he was always in the, uh, world of. Business process in some fashion and optimizing people's process and systems and automation and analytics from a pretty early on, you know, he's been doing it now for 30 plus years.

And so that history, and he was always a Ryan his own company since I was, since I was born. Um, and so prior to, since I was born and so that history of that, um, made a big difference in my perspective, on this kind of thing and, and working, you know, for yourself, if you will. Um, and so that's part of the story and I'll dive into it more.

But growing up, I was really my, the thing that I was like so excited about was. Uh, the outdoors and, uh, which is one of the reasons I live in Colorado in the mountains, because I love that it's a big part of my life and it plays into this story of it. And actually, you know, if I take those lessons from it, it has had a big impact.

And so I grew up really, really interested in business always, but really, truly my, my, like the thing I was really excited about all the time was like sort of the extreme sports of the outdoors, the sport that became, went through Scouts from an Eagle scout. And so that helped develop some of the fundamentals around the safety and actually being, having those skills.

And then what that develops. And I think this is an important thing for people to recognize if they participate in any kind of sport that has a physical component. And a real component. Those lessons are lessons. If you realize then that you can carry over to business. Um, and so that's how this ties in to the whole business aspect of things, uh, which is really cool.

And so I, I, you know, got a degree in environmental science. I was always interested in the environment and the world around me and ecosystems and how things interacted and created a system, a whole system, not just the parts of the system. Sure. And so that to me was always really exciting. And then after college I got really.

I was, I was paddling whitewater and the kind of whitewater, oh, your boat. And you'd go over a waterfall. You know, it could be 40, 60, sometimes up to 80 feet. And, and then you're running as rapids and we did some international traveling. Then I got into guiding that kind of a whitewater and also teaching people how to paddle that for a little bit.

And so I was in the outdoor industry. And as a consequence of that, I ended up becoming a sponsored athlete in that realm and what I, and that was really the major introduction to the world of marketing, marketing, automation, and business. Because later what I realized at, towards the end of the paddling professionally side of things, whitewater, kayaking, and racing down creeks and doing expedition type stuff is that I was marketing tool for the company.

I was a way to give them greater reach. And, and so with that, I started to recognize more things. So there's the whole aspect of guiding people in challenging terrain, looking at risk, understanding the judgment that is involved with that making decisions so that you can do these things that look to other people, very challenging, crazy, right?

Wild, just like just like taking risks in business. They look crazy and wild and people don't understand what you're doing, but if you understand the risk, if you're aware of that risk and you also know where your potential downfalls are and where you can adjust. Without having to, uh, expose everything and potentially lose it all.

You can set safety net. So almost for yourself, right? Yeah. Then you have this really cool opportunity to, for me, it was taking those lessons and applying into business to look at it and go, well, how can I apply this with this? How can I protect the downsides in what I'm doing? Right. How can I take these?

Like what looked like wild risks to other people and do them in a way that. You know, it's actually quite safe and calm. And for me, I'm not red lining my heart rate. I, I feel very in control of all the factors and I know where to get out if it's, if it gets real hazardous and I know how, you know, and I've set up systems and processes and also a community and people around me to keep me in check.

Right. Yeah. Yep. So those lessons from that, you know, that's, uh, that was a big portion of my life. The outdoors still has we ski and climb all the time. That's your skis are on the wall because there's, you know, 12 inches of snow on the ground. I can like out the door, they're making like pretty much out the door, right up the mountain.

So very fortunate in that way. Yeah. Uh, and, and by design as well, a mix, you know, of design for sure. But, uh, those lessons. Taught me a lot. And then also the other side of it was the automation, which we'll get into here and I'll bring this all together. Is that the automation, the desire there is to say, well, if I want more time in my life to do these things, I mean, I'm pretty good and I'll get up early.

I'll stay at you, stay up later. And like, I'll get it in. But if I really want more time and I use automation appropriately, well now I have really an opportunity to pursue the things in life that are really, really exciting to me. Right. Be a combination for me, it's pursuing new avenues of the way we're doing our business, what we're doing with our business.

And it's also, if I'm real and honest with myself, it's, it's spending time outdoors and being more on extended trips and expedition type stuff. And the daily stuff here and having systems, processes, and automation. In place, make that largely what possible in a big way. Um, and so, you know, you don't necessarily think, oh, sports X, you know, the sort of mountain sports is what I'll call it as a, as a tool to understand how to make business decisions.

But for me, I've been able to relate those experiences and, and I'd be okay. Uh, I wouldn't be giving you the whole picture if I didn't introduce that aspect as important part of my life.

Ron Brooks: Yeah. What, you know, Sam, what's interesting with that. And when you, if you think of just in, I'm not even in a vacuum, but just overall you think of what's involved in outdoor sports, there's a lot of creativity.

Um, it moves, it can move fast, every single experience isn't the same. So it's not very homogenous in that sense. It's absolutely certainly, you know, very, you know, heterogeneous in terms of, you know, your experience from one moment to the next, you know, based on a number of different factors. And so I love that kind of tying in your background on, you know, cause I could see how it shaped a lot of your thinking from a young age.

That's like you said, when you go out on your skis or you're out on your bike or you're climbing, you know, there's a lot of, you know, improvising, you have to do absolutely. And you make a mistake. You have to, you know, quickly learn from it and get up and move again. Right? Yeah. You can't just lay there and wallow with it.

Sam Ovet: That's right. Know, you got to do it. You got, you know, and certain situations, not all the time, obviously, but you're in a position where you're making a life or death decision, you know, or like you're potentially exposing yourself to something that could, they could injure you and those things, you know, it does make, it is different than business decisions, in a sense, they can be just as scary.

Let's be real. But at the same time, if I always go, nobody's gonna die today, you know? And that could happen in some of the other things we do. And so that allows me to have a clearer, calmer, had a lot of the times, um, when things are challenging, you know, and you're, you're like, cause there's no doubt about it.

Th there are business decisions and some of the stuff. That we do is like, there's a high level of stress involved. Um, and, and I think anybody who's been in business these amount of time will, would probably agree that like business can be very stressful and, and, and, um, and that stress, isn't always a bad thing because you can be making a big decision that's positive, but it it's a big decision.

It's stressful. You're using your resources and things like that. So, yeah.

Ron Brooks: Well, I think making decisions under that pressure, I think that's where they overlap very well, is that when you're doing outdoor events like that, and like you say, you know, life or death can be viewed, like you say differently between business.

And, um, but you know, we talked to a lot of business owners and we'll get to this in a little bit. When we talk about the pandemic, you know, a lot of business owners stress about things, you know, employees and people, right. And you know, what's going to happen down the line. And, and can I make sure, you know, these people have, haven't trusted.

Not just themselves, but their families, you know, their family livelihoods and trusted to me. And so, um, you know, I could see the, you know, that, that parallel between, um, the same, like when you go out and, you know, say a group of your buddies and you guys go and do something outdoors, you're concerned about your buddies wellbeing, you know, along with yourself, right.

Sam Ovelt: That's right. Absolutely. And it's at that position of, well, I, I am in charge of my decisions that I'm making right now for myself and, and my step that I take or that stroke that I've taken my boat or that, you know, move that I make while I'm rock climbing. And I may fall like that is my decision to make.

And it's, it's my solely. I can take it or I can not, but at the same time, I'm part of a group of people or a small party of people that are relying on me to make that and do that safely in a way that doesn't impact them negatively either. And also watch their back and potentially, you know, be ready with the rope, should they fall?

And so they can get back on the climb because we're part of a team to get up, you know, a mountain or, you know, in that type of situation. So I think there's a lot of overlap, like you're you were mentioning and, and I think. It goes, uh, sometimes unnoticed people go, oh, you just do this thing outside. Well, actually, if you take those lessons and you recognize what you can, how you can apply them to other aspects of their life, then it becomes this like amazing tool to learn.

If you don't it's, you know, then you're just doing this other thing and it's exactly.

Ron Brooks: Yeah, exactly. It's interesting, Sam, I think, you know, it's a, it's an interesting parallel to draw on and I could see again where it's kind of shaped your life. And so you'll as the, the company, you know, so you have the beginnings of the company, right?

So talk about those early days, you know, and, you know, again, it's kind of on that same line of that period level where, you know, when you're really early getting into, you know, a new outdoor event, you know, and there's, you know, you're, you're trying to foster, you know, how you're going to approach it. I imagine it's the same in business that, you know, there are some great joys, there are some, some things that, you know, you learn from, you know, kind of walk me through that process.

Sam Ovet: Yeah, so the, to go sort of back, like you're sending that mobile pocket office side of things and how it grew it started from. So I was doing the outdoor sports things and I was involved with more and more of the marketing side and realizing what was going on. And then I was starting to learn about these marketing automation tools because I started to see them being used.

Um, and also then when I learned about them and the ability to automate things, um, but sales marketing is just the whole process in business. I, you know, when you see that, when you start to think in systems and you see it applied in a domain that you're watching in a part of what I found for myself was that I started to see everywhere opportunities to automate things and where people would just do all this busy work.

And that they weren't enjoying and customer journeys that people were creating for the customers were falling apart, or somebody bought something and they were forgotten about, you know, there's just all these, all these, I just saw these holes and it was kind of like light bulb went off. And I was like, all right.

You know? And, uh, so my, there was a, there was a year about after the, the, and everything, and my wife and I went on the road and we traveled and taught for leave no trace center for bioethics all around the Western United States. We lived there out of a Subaru. Um, and then we, and Subaru sponsored the program.

We taught in wash Winton, Oregon, California, Arizona, Nevada, Utah, and Idaho, and systems were a huge part of what was being used to manage it, um, program. And then through that, it was just even more exposure. And then I, I, we decided personally that, okay, I was ready to get out of the outdoor industry. Cause I was, I was either needed to buy an outfit or something like that, or, or go a different direction.

And so I was talking to my dad and he said, well, you know, there's some really exciting tools in the automation space that he had seen. And we started to explore those. And then a long story short on that one, and we'll go into some more details, but basically he said, well, I've been doing this in the business, you know, analytics world and process, but not for the marketing side of things and not for the sales side of things as much.

Yeah. Um, and the tools are just amazing. They're getting so much better that are available to people. It's an exciting space. And what I was seeing with the systems that were being used and just the, the dearth, right. The lack of like these systems could be put in place for so many things. And I just saw it just like a whole everywhere.

I would look in the outdoor industry. Um, and so we decided, well, why don't we open up a portion of the business that's directly related to. Consulting with people and automating their process, starting with the focus of automation on the marketing, because that's, what's exciting. And then from there, if you can get that going well, then it creates downstream problems that you have to address because you've got, you've now increased your business.

Now you have to address it with more automation. So it was a natural point to look at with that. So we decided, okay, well, let's do this as partners in the business. So we, he had

successfully run his other company, but he didn't necessarily have customers that, that were interested in this aspect of automation.

That much. So when you open it up and partner started partnering in this, I think is something somebody can take away. Is we partnered with software companies. Um, one of the ones we partnered with heavily was Ontraport and we're still a good partner for them is, and it's a, a automation tool.

And that is where we started to get introduced by doing there, being on their list of certified consultants and things that you can get on starting to get introduced to businesses who were seeking out complex automation to handle their high influx of business. So that was the key we were going after businesses that had a big demand, right.

They had a lot of interest, but they couldn't handle the interest and converted into sales effectively. At the, at the amount they wanted, and then they had problems with fulfilling delighting and referring. So we'll talk about the different pieces of business that apply to everybody. And, and I think you'll probably relate to these, but every business, the way we looked at it has to attract new business.

Right? If you don't, if you don't have new business, you don't have a business. And so with that, what would happen is people who were really good at attracting, maybe they were great at blogging. Maybe they were had just a really interesting product. They had this massive interest, but they, they, they saw the numbers of people visiting their sites and opting in, you know, maybe to a basic newsletter or a simple form on their website.

And they were going, we have, you know, maybe a thousand or 2000 people a month or more opting in. But we're getting, you know, five, six sales out of it. Right? Like what about all these other people? Exactly. What about all these other people? And so that was that to us was the type of customer that we wanted to work with.

Um, yeah. Cause that was the one where there's the biggest opportunity to help them out.

Ron Brooks: What about industry? Um, Sam, is there specific industries, you more like the target as a, you know, or maybe is there an industry that you kind of stay away from, or

Sam Ovet: that is a good question. And I was going because the interesting thing is what we S we started to find this. We had an initial focus on, well, let's, let's look at manufacturing, the end, maybe some outdoor companies. Cause my dad knew that space and I knew the outdoor space. And what we started to find is through these introductions, by working with different software companies, the people that were coming to them, it was just across the board.

And so we said, well, what's a framework that works across the board. Industry-wise because sure. From a business perspective, it's all pretty similar, the fulfillment of the actual product and what they do is unique. It's different and there's different buyers for it. But if you, so we started to put together what is a business framework that works for any industry, because we were getting interest from all these different industries.

Yeah. And the framework that we settled on was the following you got to attract, so that's attract and then you have come apart, right? So if you have that interest and you're going to convert that interest in leads and sales. Right. And then you got to fulfill, right? So across the board right now, any industry, this applies, you got to fulfill whatever you promised.

Right? They bought it. What are you feeling? That could be a good, that could be a digital thing. It could be a service. But you got to fulfill that promise. Otherwise you're quick out of business because you're not doing what you promised, right?

Ron Brooks: So you said you have to attract

Sam Ovet: and you have to convert that interest into leads and sales. Right. You've got to capture it and turn it into money through sales, and then you've got to fulfill whatever that great promise is that you made. Right. And then, and then, and that's where most businesses stop, but there's two more stages that we added in for the ones that do it really well is delight.

So if you can help someone get great value out of whatever it is you do. Yeah. After you've made that sale, that could be additional services you provide. Think about. For example, someone who sells hot touch, right? Sell them a hot tub. Well, you got to get that hot temp service. You got to get it cleaned.

You gotta maintain it. You need, you need the chemicals for it. And so those are all things that if you don't do them, you're hot. That becomes scummy. You can't use it, right. It's it's now less than delightful for you. And so that's a good, just kind of something I think many people can just think about and relate to, you could say the same for pools, but if you can delight them and make sure that their experience, whatever you sold them is, is the best that it can be.

There's an opportunity for you to generate more revenue right there. Okay. And there's an opportunity for you to increase the customer service, which then plays into the final stage. We have attract, convert, fulfill the light and refer and the final stages refer. So you need people to refer business. Cause that's the, that's the best marketing.

Ron Brooks: Exactly. You have to the word of mouth marketing, right. That just comes from people referring, um, you know, warmly, right?

Sam Ovet: Yeah. And anybody getting started. That's why it's hard because you don't have business that you've done before. Right. But once you do that, if you focus on it and make it part of your systems process, and then potentially automation, and we'll talk about how we, I think about that, uh, then you have this amazing opportunity to continue to grow your business, and you can then look at the different stages.

And this is what we did. So this is why industry ended up not mattering. We thought it would, but it really ended up not, not mattering is that we could apply this one to, you know, attract, convert, fulfilled, delight, refer five stages to any industry and it, and it works. And so from there, you look at those big buckets, those are your systems, right?

That's your system to run the business and not what you said, that's your system to run the business. And then you look at what are the processes in that system. Are they loose, maybe they're not defined yet, but you have something. If you're actually doing business, you have something that you're doing in each of those stages for, and a lot of people forget about the last two, that divide refer.

So you may not be going on there, but, uh, but the best businesses do. And if you want to be like the best businesses, then you should do you want to, then you look at. So, this is how we take it to automation because it doesn't actually start. We don't jump in, like, let's go, you know, it's like sometimes there's little automation wins.

You can do to free up some time. But yeah, majority of time you got to look at your, your, and this is where that, oh, environmental science and looking at ecosystems and systems, like I took that knowledge and applied it to the business. And what are the systems that make up, what are the, what are the viewpoint?

And then you break down systems into components and then you can, you can fine tune the components, right? So the system is that whole thing. That's a business system. Everybody, every, every business world has at least the first three all the way through the fulfill. And then the good ones have the light and refer.

And then from there you go, what are the processes that we do in those stages? Right? So for example, What we look at there and I'll give you a story. Yeah. Is we have a customer they're, uh, an amazing group of folks that their website's called mastering diabetes. They run online courses for folks to help them master diabetes.

And these two guys are incredible. Cyrus and Robbie, they both have their type one diabetic sport. And so they have to manage their own. And they're like the fittest dudes I've ever met. And, uh, and they're awesome. And they are New York times bestsellers with their book. And, you know, they had, they were really, really good at attracting people organically through their blog and all their social media and everything they did.

They were great at what some people would consider the, the cold part of marketing, right. Getting new cold, interested to find out. And they solve a problem for people. And Cyrus has a PhD from Stanford. Um, and so they're brilliant guys and they were, they still are, you know, have a lot of traffic that comes to their site and opt-ins that they wanted to convert more of that.

And so we started looking at it and saying, okay, what is your components of attract, convert, fulfill the light refer. Right. But these guys are, you know, they're attracting a ton of people, right. Really good at that. Um, and their primary challenge was converting that traffic fulfilling. And then they were actually decent at delighting people once they're in.

And then they needed to boost up their referrals as well, because they had great success. People were managing their type one diabetes and getting rid of effectively the condition of type two diabetes. So with them, we broke down the systems. And one of the things we did first with them is we said, okay, what are the parts of your system that you need to focus on?

Firstly looked at the whole thing. Then we dive in and we looked at the, the processes within each component of the system said, okay, you're pretty good at attracting people. We don't need to like talk about that. Maybe we need, make it a little easier for people to get in. Right. There's some opportunities, but like largely you got that covered.

Now, and I know that's a big point that people want to talk about and we'll, we'll get into that because that is like, I think some of the hardest work that people do in businesses attracting new business, probably one of the hardest things. Um, and then you have convert, right? So they needed to convert more of that interest to pay people who wanted to take their, you know, work with them and work with the different, uh, set of nutritionists that they had on staff and buy some of the different products to help them.

And then they wanted to encourage people to actually get the results that they started after. And so the w this is a tool that people can use. We said, here, fill this thing out, fill out two different sheets. One is what are all the pieces of technology? Is there a technology heavy? Cause they run very digitally.

What are all the pieces of technology you use to power your business? Right? Every one down. So they started writing down and we started finding more. We said, go into your PayPal, go into your bank and look at everything. That's a recurring subscription, SAS product that you've bought, you know, and pretty quickly we found there were like 60, I think it was like between 60 and 70 different tech tools when they added them all up.

Every single one that was used to run the business. And so, number one, that was interesting. And what we found there was what are the opportunities that you're missing here? Right? So that's one aspect. And we said, now write down what each one of them does. Hmm. What does it do for you? What does it, it connect something.

Does it deliver something? Does it show something? What does it do? Does it allow you to do something right? This is every piece of their business all the way through to the accounting aspect of it. Yeah. And then we said now too, to actually go through from the, starting at the convert all the way through to the fulfill in their case and, and the delight, because it was ongoing.

Once you were involved with them, what do you have to manually do? And what is automated today? Because a lot of people have some basic automation that they don't even think about it as automation. Yeah. And so they wrote that down in what we call personal activity log. So we sit here, take this, spend two to five days, depending on how long it takes that cycle of what you do.

Sometimes people cycle spam maybe more, two weeks, but after about two weeks, you figured out everything you can do in your business. Right. You've done. You've gone through all the different manual things. Most of the time. And document, it just, it's a simple spreadsheet. Put it on that spreadsheet. And then that is your process.

So now we know the tools involved in running your process. We know what they do, and we know what your actual process is right now, we can start to identify what is actually taking up your time so that you can focus on improving your business. And once we found out the

things that were taking up the time, then we were able to start looking at what of, that can be automated to take that time off their plate.

And in some cases it had to be delegated, but you with me. So the, this, this whole idea that first you start with the big picture. Okay. Then you look at the process involved and then you look at the systems you use to run it. And then now you've got a picture of what can be automated, right. And if the work doesn't require creativity, you should delegate it, automate it, or get rid of it and don't do it anymore.

Ron Brooks: And so then Sam, how do you, as, as an owner, right? How do you recommend viewing that process against, you know, cause so you've got your human capital piece of that, right? Um, and I'm thinking of someone that's maybe been in business, they've kind of vetted. They've got, you know, 10, 15, 20 employees and they're looking at what they automate.

And so philosophically. You know, again, I guess I'm leaning into the, kind of my thoughts kind of automating, which is this. And I said this when I was running, you know, retail operations in banks where, you know, you're balancing technology with the people. Right. And so I always had this idea that you'll technology should handle those routine, not say mundane, but kind of those routine, um, you'll kind of transactions so that the people can do what they do best, which is not handle the routine stuff.

People are best, um, sort of freestyling, right. Kind of, um, you know, building relationships and kind of freestyling. So they're, they're good at that qualitative kind of piece of, you know, building the relationships and going through that process, attract, convert, fulfill delight, refer. You know, that's what the human being should be doing.

The technology should do some of the back behind the scenes stuff that tap that help you attract, convert, fulfill, delight, and refer. So with that kind of philosophy, you know, you know, how do companies, or how do you recommend companies balance that? Because, you know, then on the employee side, I can remember in banking, um, you know, uh, being a branch manager and they came in and this was back several years ago when they were really trying to push people to the ATM.

Right. And you know, of course, a bunch of us stand up and say, well, what about the tellers? And they, you know, they're all saying, oh, the tellers are going to be fine. You know, it's not going to impact them. And then we're all kind of like an Armani, oh, BS, like, you know, and, and, and ultimately that's what kind of happened was branches now run with way less.

People than they did in the past. And, you know, we can all argue whether that's kind of good or bad or indifferent, but I'd love to hear your thought on that because you know, there's always this fear from the people right. Of automation that, you know, the rights of the new yeah. It's a threat to the human being.

Sam Ovelt: I'm going to leave my dog. I'm going to lose my job.

Ron Brooks: Yeah. How do you balance that? Because there's a cultural piece to that. There's a, there's a lot of impacts. Um, and again, what ultimately goes back to, um, you

know, the business mission, uh, that can be adversely impacted, you know, I would imagine if that's not properly balanced.

Sam Ovet: Yeah. So, you know, I got into the weeds there for a second on talking about the, the, how, how we think about it, but zoom back out philosophically. Um, absolutely. The way that we think about it is it's, it's be human where it counts otherwise automate. So that's like, that's like the guiding principle, right?

How can you be human where accounts and otherwise automate, right. What does that mean? It means different things for different businesses, but it is in the line with this idea that humans are better and generally more fulfilled when they're doing creative work. When they're doing the work to design, how they're going to actually work on the business versus routine mundane tasks.

Right. Right. And so the way that we encourage people to think about it and we, and we take people through this process, when we talk about it is that you, you want to start with identifying and there's a couple of different perspectives. I'm going to look at this from so one is the, uh, The perspective of someone who's the CEO perspective, right?

What is that per that person? Their responsibility is to grow the business usually, right. And, and expand it maybe into new markets and make sure it's run well. Um, and sometimes that's divided between someone who's, who's more on, uh, some, even more detailed to the operation level. But the idea is that if you are the CEO of the business, you want to say, well, what can I put in place that allows my business to scale?

Right? It makes it a little more Bulletproof makes it more resilient. If you have systems that do the job of someone that would do that same thing manually, and it's automated, like you said, those mundane tasks that still have to happen to run the business. And they're usually boring mundane routine tasks that are detail oriented error prone.

And if they don't happen, impact the customer experience greatly. But are not really that enjoyable to do. And are usually don't cost that much in terms of human capital. Let's be real. Like it's, you can hire a lower paid person to do these types of things. Um, then you, and it's routine, that is the kind of thing that you need to automate, right?

And, and that same person, it doesn't mean you have to get rid of them. Sometimes you will. That's just the reality, right? Uh, but that same person is probably a very creative individual that has a lot of experience with your business. And if they're doing these things on a daily basis, they could be your best set of eyes to understand where more of your business could be automated because they're doing it.

They know what's being done. And so they can actually be some of the best people to help you design your systems because they are the ones in the trenches doing it every day. And they've probably created a little workarounds and things like that. That actually. Improve the experience make it better that you don't even know about.

Ron Brooks: Yeah. You know, um, Sam, it's an interesting dialogue because, you know, I've had this idea for the grocery business for some time and that, you know, if you look at what

Amazon did and how they kind of stiffed FedEx, right. By coming in with their own, you know, fuel efficient vehicles and kind of stiffened them out the way and okay, we'll take it from your boys and.

Yeah. Now they're in the delivery business. Right. Um, you know, I look at that and as like, how could that be modeled in the grocery business? Right. You've got areas, um, in low to moderate income communities where it may not be maybe the most prudent or maybe the most efficient right. To add grocery stores.

Right. So you've got these food deserts across America. My thought is, is that it can be automated to where, and if you take. Sam's club and Costco and some of those, um, you know, folks model and combine it with this that, you know, automation could be used at where it wouldn't necessarily, um, you know, uh, you know, result in people being, let go, but it would reroute in a different skillset would be needed at that.

So then there could be a retraining or kind of repurposing of the human capital. And so I want to get your thoughts here on it kind of along the lines with what you just said, because I think it could be powerful for those listening is taking, you know, the delivery business within the grocery store. So the grocery store is not, is retail kind of building that everybody drives up to and is getting, you know, anywhere from one item to however many items, but now it's largely delivered.

So you ordered ahead of time through, you know, mobile app, whatever, and it's delivered on one of those trucks. And so each store has this. Certain mile radius that delivers kind of like your pizza place, right? Yeah. Um, but then the employee, you don't need like all these checkers and all these bag people and all that, what happens is then people are stock people.

So now you've got people because you don't have the general public coming in, you can stock and merchandise within the, you know, the building much different because now that box of cereal can sit up 20 feet high because you're not worried about some old lady used to be able to reach it. So you got to merchandise it at eye level, right?

So now you spent more time in quality control. So now you have people, those checkers now are in quality control. Um, you've got, you know, the stock people who are putting things up, and then you've got people that are putting together orders right. All day. And then you've got delivery people. So people that are driving trucks and vans, delivering it to people's place of business or their home.

And I always just kind of had at a very high, rough, ideal level, of course, you know, that idea of a nice balance to the example we're talking about of, you know, you've got this really stark technology, Sam that's continental that, you know, innovate the way that people get fresh food. Right. Um, and you've taken away one of the pain points, which is, you know, the, the shrinkage and all that type of, of managing a retail store where John Q public is just walking in so many hours a day.

Um, and then you've got this delivery system, which is getting things out efficiently. You've got quality control. Which you probably don't have as much in the retail grocery right now

today. Um, but you've got someone that's checking what's coming off. You know, how long something's been on the shelf, that sort of thing, you know, Instead of pushing in your cart baskets that are dumped on a parking lot.

Sam Ovet: Right. It's a great example that, that kind of thing, like, does anybody go, like maybe it builds some character for sure.

You know, pushing our baskets in, but like, uh, and there's something to be said for that kind of like stuff. Absolutely. But, but at the, at the court and the day it's like, it's, it's, it's, you know, labor is cheap for it. It's not that exciting. It's definitely not that creative. I mean, there's some creative ways to stack cards together for sure.

But like, it's not ultimately after maybe you've done it for a month or two, you've probably figured out all the different things that are going to be creative about it for the most part. And it's those kinds of jobs that like, people want to move on from anyways. They don't want it for the rest of their life.

Yeah. And, and so when you can automate those things and create the experience, like you talked about where it's a more controllable experience, you pull out some of the variables it's easier to manage potentially. Um, you get your quality control can go up. Right. Uh, that is a great opportunity to put systems in place that have a degree of automation in them.

Right. A hundred percent, because that is, that is the stuff that's exciting. And the other thing about it too, and I think this is an interesting thing that doesn't get talked about as much, one side of automation is, oh, you know, we can scale this, this idea, right. This idea that that solving people's problems.

Right. Cause that's how businesses, it's an idea that solved some problems for people, right? Like if you use automation, you know, the, the big picture minds. Cause I, this is great cause and scale it. And then, and then the CFO mind should be thinking, should be thinking, wow, If we invest a little more money up front in our automation, then that's someone that we don't have then that usually if you look at it pays that self off within a year to five years, depending on the business, oftentimes faster, more than that year, tougher, because now you don't have to have paid a, pay a human to do that.

And, and humans don't like to just get paid once they like to get paid all the time. Recurringly systems don't care. Systems get built and they get used, right. And now it's automated. Right? They get paid. I don't know about you, but I got, you know, work on something and I haven't hired anybody ever that says, oh yeah, I would want to get paid once, you know, uh, one year please, one year salary, please.

And then I'll work indefinitely forever until you know, and that's what animation does. And that's also a way to look at it in terms of, and we can relate it back to that. That what you talked about there is, well, what if we develop a tool that goes down the aisles, right? And this is the same for the marketing automation, the sales automation, the fulfillment light for all this stuff is safe.

In terms of how you think about it, right? Implementation is different, but in terms of how to think about it, well, if I, if I can make a robot to go and like pick the right thing and I got a system for that, well, all I need is the power for the robot. Never going to take a vacation. It's not going to get sick.

It's not going to take any leave. And it's also a super boring job for a human. And that same human is a creative person, right? Individual with a mind and a brain, every human, and could probably be doing something way more exciting and fulfilling with our organization than picking and moving stuff.

Ron Brooks: Right. Exactly. And so that's where I see that as they could be like, say retrained and repurposed, and this is the organizational culture has to come into play because then senior leaders within organizations have to value organizational development and training and development can be black. So one of the keys to that, if they want to be heartfelt on, like you said, retaining the people and, and before the people, then they also have to have the mindset for training and development.

In my experience, um, that's a piece that's lacking. I think that's been crippling to many companies is that, um, they only see automation as kind of one sided as just an process, get rid of the people. Right. And this is cheaper than the people.

Sam Overtt: That's right. And there's a degree of that. That's just, that's just a little bit raw and true.

Ron Brooks: Sure, exactly. There's a little bit true.

Sam Overtt: And it also, I think, is a social, uh, sort of change that we're going to have to adjust to, to as, as a culture to say, you know, what, as more things get automated, I need to be able to be adaptable and retrain myself and say, okay, well that, and start to recognize it.

You know, that might be automated. What can I do? And also as a culture, what can we be training ourselves on and valuing that is hard to automate. And there is, and that that line is pretty obvious things that take creative problem solving. There are a lot of industries and a lot of jobs out there that are going to be incredibly difficult to automate, or will have elements of automation to accomplish the job that require a pretty darn smart human to operate those automated tools.

Very true and there's automated processes. And so I think automation when it's used, right. And when the culture is there for, it creates these really interesting, exciting opportunities that are better paying, more engaging and more fulfilling when it's done right. There is a downside. And I think it's a raw, like downside to, um, to it is that like there, there are jobs that get lost because of automation. The whole, it probably creates more jobs, but it may not be the same job that that person yelled for.

Ron Brooks: Yeah. And I think that's kind of the big point there, Sam. I think that last point really kicks it is that it's not that it, it will eliminate jobs. Right? I mean, yeah, that's the inevitable piece of it.

Sam Overtt: Types of jobs in that industry, but it will probably overall create more jobs. In a hall.

Ron Brooks: Yeah. It's going to w I, and I think when we say it's, it's going to impact jobs when we say it from a more negative perspective, like you said, I think you alluded to this is that the type of job that is going to eliminate, um, maybe something that is heavily populated by a lot of people, in some cases, depending on the industry.

And so, whereas in the past, you know, we, we had a hundred years of, you know, people just kind of training up and developing the, go into this type of role. Now, when that role live in aids, you know, it's going to be, how quick do people adapt to that changing environment to where, how are we preparing today's, you know, the current workforce and then tomorrow's workforce, you just, you know, maybe even more important to the new roles that are today and then tomorrow. And I think the better we do that as a country, um, the better the country will be as we span out and look, you know, into the future, is, are people prepared for the type of jobs that then the automation does create, which are going to be quite frankly, you know, require a little bit more education, um, and a little bit more autonomy, a little bit more, um, you know, kind of free thinking and that creativity, right?

To be able to, like we talked about earlier to make decisions and choices that are smart for all, everybody, all stakeholders involved, right. And people can, people in those roles be trusted to make those types of decisions. Like we talked about even with the outdoors or in business where you've got to make them sometimes maybe not with full information, uh, sometimes on the fly, right. Uh, and in the face of risk and fear.

Sam Overtt: Yeah. And I think at, I think you nailed it. There is that the, the fact that like there's a cultural aspect, jobs are, are going to change. The type of job is changing. Um, and, and with automation, like the type of job is probably a little more demanding of the mind and of your leadership skills and your judgment, your ability to make good decisions is going to be valued more because these are the jobs that aren't the rote manual thing.

That's relatively straightforward, easy and quick to train. It requires creative problem solving. And, and, you know, you look at a lot of industries and there are, there are so many that are just going to take a long time to be automated, like, right. Like a basic one. And this is just totally basic, but like plumbing.

You're not gonna automate plumbing anytime soon. Every every house is plumbed totally differently. You know, you're going to figure that out. And like those types of jobs, a lot out there that that is not going to be automated. But the, I think a lot of the jobs in the, what we consider the white collar workplace are actually are actually, a lot of them are going to be automated pretty quickly.

Yeah. I think more than people realize, you know, people, people think about automation taking jobs in manufacturing and stuff like that. But a lot of the work done in the white collar workplace in terms of, you know, computer-based work. A lot of that is going to go away and it is. Um, and so it behooves you to be the one that is able to solve people's problems to

be able to be the one that is coming up with creative solutions that help grow the business and help open up new markets that help create better customer experiences.

Ron Brooks: Yes, absolutely.

Sam Ovet: Because that's the type of stuff that's not going to be automated. You know, the machine doesn't know, I don't know. The machine can deliver a great customer experience if a human designed one.

Ron Brooks: Right. going back to what you said earlier, that's intriguing. I was kind of, eh, I was connecting the dots even with what you said earlier about attract, convert, fulfill delight, and refer. People are going to be at their strongest in the future, in the delight refer. Yeah. Attract, convert and fulfill. Is laundry going to be automated?

Sam Ovet: Yeah. You know, I'd argue that attract is pretty tough to automate because you need to be pretty creative and, and it's largely your personality brand offer problem being solved. That's going to create. An attractive environment for people to become interested in, but I'd say convert and fulfill for sure those are automated and then the light and refer those, those have a big opportunity for people to improve those experiences and then apply automation to them. Yeah. And then B and then T you know, you take a smart human and say, watch this automation, look at your metrics, make sure that when you build your automation, you have metrics and try and improve it because that's where it gets really cool.

And that's where it, you know, to improve an experience, takes a creative thought process. And then you use automation to run that experience as much as you can so that you don't drop the ball because that's the other thing automation does, right? Like it keeps you from dropping the ball on the customer experience.

You're trying to provide to people. Right. And then you get more people who are delighted, who, who wants to refer because you haven't dropped the ball, you know, anytime you put humans in the mix, they drop the ball. Like it's just subjectivity, right. It's life storms, right? Like there's a wildfire, six miles away.

I'm not as focused on your project because my house might burn down. Right. You know what I'm saying? Right. The computer doesn't have that problem. Right.

Ron Brooks: Yeah. It doesn't have that concern. And so, yeah, the, you know, it's, um, much more objective. It doesn't have the, the fears and the, you know, the, you know, the biggest wildcard in the world is the human, right? Yeah. Yeah. It's got free will.

Sam Ovet: And then on that same token, that's what we're all as humans, I think. Most drawn to know humans connect with humans, they don't connect with machines. Right. Machines just help us deliver experiences better.

Ron Brooks: Yes. Like a Terminator movie.

Sam Ovet: Yeah. Yeah, exactly. You know, and it's like, if everything was that, it'd be pretty hard to connect with, but connect with the people's stories with, with the human behind it, with the problem that it solves.

And, and that's the kind of thing where you got to keep that human touch. Right? Absolutely. And the opportunities to delight people with just some simple human touch is amazing. Right? It's just, there's so much opportunity there for businesses to create a delightful experience and use automation to remind them when to do that at the right time.

Right. If you've got a thousand customers that are at any given time in your customer journey, let's say, yeah. How the heck are you supposed to know that it's time to re to write a thank you note or to reach out with a card, right? You can't, it's almost impossible to know.

Ron Brooks: I mean, there's no keep that top of mind.

Sam Overtt: We're not, we're not built as humans for that. Right. We have evolved to be able to do that kind of thing. So if you use the tool to automate the process, to tell you when to be human, when it can, then you can deliver more human experience every time. And that's cool. You know, that's the stuff where it's really cool. So I, you tell me where you want to take it, but like, I, you know, dive into some actionable nuggets, if you want for people that they can like.

Ron Brooks: Yeah, absolutely. Let's, let's do that in the, the aspect, uh, Sam of today's environment. Right. And so we kind of nibbled on this a little bit. Um, you know, obviously if you have not sat down January 1st and we were planning in 2020, and we said, you know what?

One of us said, you know what, you know, we're, we're more than likely going to have a worldwide virus pandemic. Um, we're also going to have these outbreaks of, uh, you know, uh, you know, social injustice, Um, for, for black people. Yes. Um, you know, w you know, all these different things that 2020 has entailed.

Right. Um, I don't think any of us could have predicted that, but here we are. Um, and so, you know, Sam, you know, kind of, you know, along this same spirit of, you know, during the pandemic and you know, how business owners, whether you're starting out now, if you're listening to this and you're new, or, um, you've been in business for some time, and you look at these areas of attract, convert, fulfill, delight, and refer, um, you know, what are you seeing now during the pandemic, um, on how business owners are addressing that?

Because, and the reason I say that is because, you know, certain industries were impacted really hard, right? The restaurant and travel industry took the kick in the gut for sure. Um, you know, other industries, you know, uh, Yeah, it expanded. Right. And then did more because if you think of like the fintechs, right.

Or, you know, um, obviously the social media companies are, so anything tied to the kind of related to social media as, you know, Netflix, right. Boomed up even more. Um, you know, so those industries that are tied to the home business where people were more home bound, you know, through their social distancing, you know, those businesses continue to, you know, to flourish.

But, you know, I love to get your thoughts on that and kind of how this all kind of aligns with the current pandemic.

Sam Ovet: I'm glad you asked, I think the number one thing right out of the gate is like obviously more digital, like that's a theme, right? Everything's more digital. Yeah, for sure. Just a hundred percent.

Cause that's that just forced that right out of the gate with the mandated quarantines, just we didn't have a choice. Things had to go digital to keep communicating. Yeah. People's hunger to, um, Have human relationships didn't go away. Henry has gotten greater. Yes. Uh, and then we throw technology into the mix from the digital perspective.

Obviously that's something I think about a lot, but I think it is actually one of the great equalizers technology is, is largely in terms of business technology to run a business is cheap today. It's cheaper than it ever has been the actual tools. And it's accessible. I mean, think about it. You are, you are running a podcast on, if you went back 10 years, these same tools to run, this same thing were exponentially more expensive.

Ron Brooks: Oh yeah. Uh, you know, 50 times more expensive. Yeah.

Sam Ovet: To do it at the quality and the level you're doing. So like the tools to run a business today. They're more accessible than ever before. And so they're a great equalizer. What's not cheap is brick and mortar space never has been. And it's hard to get into big investment.

You don't know the big risk, right? What is cheap, but you know, it has a potential to come a big reward. Let's be honest, but now everybody's using the internet. It took a pandemic to get people to use the internet. Right? Like fully, everybody knows. Zoom is for the most part, you know, like this is the type of thing that's forced everybody to use.

Internet tools really painful a little bit for people. Yeah, sure. But like, they didn't have a choice. So it forced the change. And so if you have an idea today that solves a problem, your ability, it is crowded out there. There's a lot of noise because it's more accessible, more people are doing it. But if you consider that, you know, nearly 7 billion people vitamin, I don't know what the actual user numbers of the internet are right now.

I'm sure there's metrics somewhere, but like there's 7 billion people on the earth. There are a lot of people using the internet of that 7 billion. And if you have a problem that you can solve for people, yeah. You have the potential for a business because you can reach them using the internet and the tools that are digital.

That allow you to do that. And from a pandemic standpoint, if you were a brick and mortar, right? Cause those are the ones that were largely impacted, like where you showed up and had an in-person experience that got hard. But if you say, what is the problem that I solved with my in-person experience, right?

What is the FA and a problem can be fulfilling. Something that is exciting to people and can it doesn't have to be a problem that is like a negative thing. Know for, for, like, for example, you go, if you, and this is a harder one, but just as an example is like, is it, uh, if you go to a play or a show, is, are you having a problem?

No, but you're fulfilling an experience that people are excited to have. And the problem is that's the only place they can get it right now. Right? Yeah. So if we look at, if we, if we reframe it and take and go back, what are the component parts of my business? Is your business actually just a store? Is it, is it a physical space?

No, you probably solve a problem or provide an experience or service or good people. And so. If you look at it from that perspective, then you go, okay. The, the, the landscape has shifted. People can't come in anymore. They're afraid to come in as, and so I can, I can do a couple of things now that it's not mandatory lockdowns and things like that, you know, that was hard.

No doubt about it, right? This course, people who are on their toes, did what they could to pivot that experience, to deliver the problem solving or the delight that that experience created, or that social connection to that experience created into a digital way or a socially distant way. Right. So that's a pivot.

What do you do? What do you solve? That's the question you gotta ask yourself is what do you solve for people? Or what do you, what do you share? Right. You're either solving people's problems or, or you're giving them something they can't get otherwise that is delightful, right. Largely right. And if you have an in-person space and so how can you take that experience and, and just.

Say, well, what do we do? And how can we use the resources we have and what resources do we need to get? Largely just technology tools in this case, which are cheaper than brick and mortar space every day, all day, all the time. Absolutely. You know, to take that experience and solve it in a digital or socially distant fashion.

Right? Yeah. And, and if you look at it from that perspective, the world is pretty wide open. Again, if I'm a restaurant, I could start doing cooking classes that I can live stream from the chef that you really enjoy. Right. I'm gonna teach you how to make these things. I'm going to bring them. And then, um, you're gonna, you know, I'm gonna do some for free and then I'm gonna have you paid for it.

Right. They'll do my takeout, but how can I, uh, you know, maybe I teach you how to make the drinks that you like to enjoy getting, right. So did everybody pivot? Nope. Yeah. Is it hard to believe it depends on your mindset, right?

Ron Brooks: Yeah. Yeah. I think that, you know, what's interesting with what you're saying is that, you know, one of the hindrances in business is, is double manic mindset. That's right. That's the mindset that this is how we've always done it since 1815.

Sam Ovet: Right. Therefore it's the only way.

Ron Brooks: Right. Therefore, like you say, that's the only way and we're not going to pivot. Right, right, right. Exactly. And I think for you. Yeah. The some people I think they'd rather, you know, that's how, you know, they they'd rather die than change the model or pivot. I mean, especially those drastic of a pivots, like you mentioned, you know, if I had a

restaurant that would be what I would look to do in the rooted in all of that, like you said, in the human piece of that is the experiences.

That's what people want. That's what you can't get with the machine. Right. And that's where you talk about the delight and the refer, yo, those experiences you won't, that's the problem Amazon has. Right? It's how do you create experience? Amazon is not an expense, right? It's nice. It's convenient.

Sam Ovett: And they went on convenience and that's the other thing that you can do to improve your business. Right? You can make it more convenient if you make things more convenient. You're going to win or if you make a better experience and if you can do both, well, then you're really doing something good

Ron Brooks: and you're cooking with gas at that point. But yeah, if you can, you know, so I think of like the retail stores, right of clothing, like a Macy's right. You know, if I'm getting killed by Amazon, you know, I would convert those stores, like say Kohl's the ones that aren't performing. Right. And then reroute your energy to the ones that are in good areas where you've got some good demographic around, but then you convert the store instead of just racks of clothes everywhere with all these departments.

Yeah. The past, what I would do is convert those, you know, a lot of it to warehouse space, think of like how Ikea does, where, you know, they've. No, maybe a quarter of the space is retail. And then 75% of the building is all just, you know, stacked to the ceiling of stuff. Right. You know, a furniture all box up, not put together.

Sam Ovett: And that retail experience that you do have is telling a story that someone can relate to.

Ron Brooks: Yeah. Yes, because it's laid out, so it's displayed, right. So you get to feel and touch it, but you get to see how the furniture is laid out. That would be like in the home set. Yeah. Either gives you ideas that you didn't have, or can current confirm things, idea that you did have, Hey, this is kind of how my kitchen's aligned this year. So like you say, it's given you that direct control...

Sam Ovett: ...you're experiencing someone builds a story for you to go and step into. Right. And then what did we do? What do you do? And I'm, I'm sorry, I'm interrupting you. But I got excited about is this idea that is this, this story. And then of course, well, one thing at a time of getting excited, but, uh, the, the idea that if I was, if I was responsible for, uh, uh, retail.

Yeah, sure. Of any kind of during this. You know, you're obviously gonna make contingency plans. How do we open it up safely? Right. Because we want to bring people back into that story. People are hungry for that story, but we don't know when that's going to be. That was anybody who had a mind of awareness was like, hopefully they figured out this is probably going to last us a hot minute.

Right. Hot minute, like playing for two years. And, and, and then like from there, it's a, it's a matter of going, okay, what was the value of this experience? How can we bring it to

people? Well, I would, I would deal with TV shows. Do I would, I would give the employees who were there doing other stuff and I would say, okay, here's what we're going to do.

We're going to bring someone who's real good at, at, at creating an atmosphere that is interesting and telling a story over video, and then we're going to. I'm going to show you the clothes. I'm going to show you the story. I'm going to go live. And I'm going to bring you through these spaces every day.

You know, I'm going to give you this experience that you can come and tune into, and I'm gonna make sure that it's convenient part convenient for you to buy it. And then, then that's where I'm gonna use automation. So that's all attracting people, right? I'm gonna give everybody a video camera and do some, just put some basic structure in place and invite people into the store in a digital way.

Right. All the different platforms. And I'm gonna make it interesting. I'm gonna make it exciting. I'm gonna make it unique because I'm showing you this stuff that you would otherwise come to see, and I want to bring you into the store again, but I can't do it physically. So how do I do it virtually and how do I make it convenient for you to buy?

And then once you buy. Well, I need automation to follow up. I need automation to make sure that you get what you were promised. Right? I need automation to remind, to let you know that if you bought only part of the set of furniture that imagine this in your space, I need to do that with automation because I can't do it with humans.

It's too like our, the brain isn't that com isn't it, isn't capable of managing that many relationships at once. Right? And so now I've got an automation problem that I got to address, but that is solving the business's problem. I do. But if I'm the business that's going direct to the consumer in that way, I'm going to say what's the experience that I was providing was problem solving.

And how can I make that virtual? And just, is it ever going to be as exciting as in-person.

Ron Brooks: No, probably not,

Sam Ovet: no, probably physical touch feel. It adds another set of dimensions that you don't

Ron Brooks: they're senses that you can't use. You can't use don't need, since you're using the senses. You're only using when is virtual or seitan,

Sam Ovet: Right. Yeah, exactly.

Ron Brooks: You're taking away three senses that you can't use.

Sam Ovet: All right. So the experience is not as, um, impactful, but can I, can I still create a pretty amazing impactful experiences that's regularly makes it available. Oh, and it's already digital and your cards already saved to your browser. So you can just buy it because you're excited and I may be convenient.

Yeah. I can do that. You know exactly that I just got to pivot and I got to, and I got to pivot fast money. That's the other thing, right? Like that's, that's the other challenge. And this was very abrupt for people. So I think the largest thing was denial potentially for some people, not everybody. And then.

I got to pivot. Okay. Or I'll go out of business. Uh, and now, and then, then the challenge was, how do I use all these tools, these tech tools to, to do the business that I want to do versus they're just, you know, a lot of times tech tools just get in people's way, this whole people down

and automation slows people down because it's confusing. They're not sure how to handle it. And that's why you don't just automate things. You look at your five stages, you look at the systems and the stages, the processes within the systems, then you figure out what to automate based on that.

Ron Brooks: Yeah, exactly.

Sam Ovet: Yeah. So it's all about pivoting.

Ron Brooks: It is. And I think of that, you know, even like, even things like the Disney store that used to just be stuff, all these stuffed animals of all the characters, right. From all the movies and shows, you know, why is that? Not, you know, like you say some type of event, right?

Someone dressed in character, kids can come in, learn the background behind each care. Hey, did you know that Mickey mouse was almost scrapped because the guys said, you know, Hey, I hate mice and, you know, whatever, but you just never know. Right. There's some story behind the character, right. Um, how it's drawn and then like kids come in and learn how to draw Daffy duck or, you know, whatever character from the thing, you know?

So, and then instead of having these rows of Daffy duck, stuffed animals everywhere, you know, then the automation comes where, Hey, if you want your Daffy duck, you can order it. There'll be at your house in two days. Right. You know, um, You know, or, you know, depending on how large your story is, your existing industry, Hey, we've got them in the back.

Right. And they're all aligned up to the ceiling. Right. And so we're bringing one out to you. Yeah. Just wait out here while you're working, you order it right there on your phone or on our key pad and ones brought out to you and you walk away or whatever that model is, the storefront that, that real estate is then, you know, like you say, it's, it's taking people and putting them in income, producing roles and not transactional roles.

And I think largely what we're talking about is how we convert people to roles that generate revenue. Yeah. And then, and use the automation to be able to do that. So that there's this healthy relationship between the two that ultimately gets to, you know, I, I just, I go back to this cause I love these areas.

I'm on the attract, convert, fulfilled delight and refer

Sam Overtt: because we have maps and PR and some basic worksheets people can use. So, uh, of this so that people can actually visualize it and like take this and use it. So what we, I would love to just make a note if you want, I can give you some, a link. That is maybe mobile pocket office.com forward slash Champ Ron Brooks or whatever you want to put and you can share it with people and they can go download and get some of this stuff and use it for it.

Ron Brooks: Yeah, yeah, no, absolutely. If you want to put something like that together, and then what I'll do is, um, it'll be in the show notes, uh, MYB community. So the link that Sam will put together, that's tremendous. And we appreciate that. Um, I encourage you guys in Y B community to go in and, um, you'll download that, use those free tools.

Um, and that's tremendous a great way to connect with Sam and his team. Um, and then, you know, definitely let them know that, you know, you heard them right here on the mind, your business podcast, but I think this resource, um,

Sam Overtt: but you're right in that, like, it is those five areas. If you look at them and you just go, if you, if you take that context, And you forget about the idea that we do certain things a certain way, and that's our business.

It's not your business, your business solves a problem or provides a service or makes it good. And, and, and that service, it doesn't have to be everybody's in a bad state type of problem. That can be a solves a problem that I'm hungry for the performing arts. I keep using that example, but, you know, I want some wonderful food that otherwise, I, I don't know how to cook myself.

Right. And like, and like, how can I, there's the obvious things you take out. Okay. Well, don't, don't forget the obvious. Right, right. Do you don't have to go just to the dramatic and forget the obvious. Right. Let's not do that. Let's do the things that are obvious. And then also say, what can we, what can we do?

How do we think about what we do? What problems do we solve for people? Right. And how can we just adapt that to the, the framework that we're given today? Yep. Absolutely. No fan, like you're, if you're in business, you're a problem solver. Right. You know, and, and you know, that it's a good idea. If people are interested in having that problem solved, it's also a good way to find out if it's not a good idea.

If you put it out there to the world and quickly find out that people don't want to take you up on solving that problem right. Onto the next idea, right?

Ron Brooks: Yep. No doubt about it, Sam, you know, as we, you know, kind of transitioning because this has been a tremendous dialogue here, Sam, just to say the least, I mean, um, but I guess as we kind of wrap up, um, W w w for you, again, we talked a lot about, you know, with the business and, and, and that's outstanding, I mean, but for you, what, what are some best practices?

Because, you know, we've talked a lot about mindset, uh, and you know, we are ready to get to any of the things really that we've discussed today. Um, you get, you got to have that

proper mindset, you know, what are one or two best practices that work for you? Because you know, a lot of people listening to this, you know, maybe kind of younger in their business and they may, sometimes you'd run into that.

You know, um, you, you get fearful, right? You get anxiety about what tomorrow's going to look like. You get, um, you know, I'm concerned about, you know, maybe not being prepared. Um, you know, there's a lot that goes into the mindset of being successful in business. Um, you know, what's that for you, what are one or two things that you really kind of hang tight for yourself that have worked for you that you think will work for others?

Sam Ovetts: Hmm. Good question. Yeah. If you're a Jew, it's different for different people. Right. But like in different stages. But if you're just getting started, don't worry so much about automation. Figure out process. Yes. Figure out process and also figure out just defining the experience that you're giving people and try and work as much as you can on the business.

So that you're doing something that is repeatable. Yeah. Um, because that's, what's going to allow you to scale that, that investment and, and as little use as do things that don't require your time as much where possible it looks at your daughter's coming in. He got a question for you, right? Hey, so she's just saying, um, so what I would say is, is if you're just starting out, um, and you're, you're, you're not at about a half, a million dollars in revenue.

Yeah. Automate things that make it easy for people to connect with you first. So make sure that you've automated being able to book a time with you. If that's what you do or buy from, you make the basics of the, the connecting with you. Easy. Don't make it harder automate that, but otherwise don't worry too much about automation.

Think about the processes and start documenting what you're doing and try and improve that. And then when you're about half a million dollars in revenue, that's when automation makes a huge difference in your business, because that's about where your scale of time versus people that you're paying the investment in serious automation will start to make sense.

Ron Brooks: Yeah, absolutely. No, I love that. I love the focus on process and again, I go back to those five areas. I almost want to call them five pillars, convert, fulfill, delight, refer. Um, y'all want to make sure I give you proper credit on those when I quote them in the future. Cause I will. Um, but you know, in those areas I say, you know, I love that, you know, understand your process.

Don't get so focused on automating, but make it easy for people to do business with you early and do that. Like you say, you know, just, you know, um, things like your calendar using the calendar. You know, tools and things like that for, you know, making it easy for people to connect with you. Right. And then you can work on over time, refining your process around, um, you know, uh, you know, the, you know, the convert and fulfill piece of it.

Right. Um, but if you're really good in the attraction, you're really good in the delight and the refer

Sam Ovet: those those three first. Yeah. You gotta be good at ad fulfill otherwise you'll like be

yeah. But yeah. Yeah. You gotta be figure out how to attract. Be really good at that. Like yeah. If you focus on nothing else, be really, really good at that and refer yeah. Those two things. And if you find that people aren't referring you it's because one of those fulfill or delights isn't working very well.

Yeah. Yeah. So get really good at attracting. Get really good at referring, getting people to refer you and then find out what's the process you're doing to make that happen. And then from there automate as much as you can have it to free up your time.

Ron Brooks: Yeah, absolutely. And even on the fulfilled side, you know, you could focus there, you know, not so much from the automation, but even at a basic level, making sure that you can do it right. Yeah. Because obviously if you can't deliver, that's like you say the whole thing's blown up, but yeah, if you can fulfill on that basic level and then fulfillment becomes a bigger priority as you look to, you know, be able to automate that basic level to get to the delight in the rougher. I mean, like you said, you're starting to cook with gas, you know that much more,

Sam Ovet: I'd say one other thing, and this is something good for people getting started out because you, if you, especially, if you're doing two things at a time, maybe you're building a business and in another job as well, one of the things that you need to be able to do is follow up with people and you're going to run out of time and you're going to forget. So if you do one automation right out of the gate, make sure that you have some kind of automation, whether it's reminder for you or it's through an automated system, that you are delivering some kind of info to people.

Once they find out about you, once they've connected with you, they'll forget about you because you can never have too much. Follow-up. Right.

Ron Brooks: That's very true

Sam Ovet: because I don't either move people to a decision of a yes or a no, both are good. You just need to get people to make a decision on whatever it is, the problem that you solve, whether they're interested in problem solving their problem with you or not.

Ron Brooks: Yep. Absolutely great way to kind of sum this all up. Sam that's tremendous. Um, you know, Sam Ovet is our guest today, the founder of mobile pocket office.com. Please go there. Uh MYB when you get done, listen to this episode, mobile pocket office.com uh, connect with Sam and his team. And again, let him know that you heard and right here, On the mind, your business podcast, you know what Sam, we're going to have to come back for a part two, because, um, this has been a tremendous dialogue man to say the least.

Um, and there's so much more we could touch on whether it's academic stuff. Post-bacc, you know, whatever it is. There's so many. Yeah, areas that we could go. So I'd love to be able to have you back on at some point here in the near future man, to just, you know, get

your take on some different areas here. So more about, you know, um, you know, experiences you're having in your business.

Cause I, I think, like I say, as, as people hear from you and, and, and more folks like you, it just, it just helps, you know, just, you know, everything overall, right? Because you know, something today was said to inspire somebody or, you know, maybe it was going to help somebody keep going where they might've been ready to quit.

Um, you know, I think, you know, folks got some real good understanding of, you know, um, you know, practical things that they can do in their business, you know, practical ideas. And so I really appreciate your transparency and openness man to, you know, to sharing, uh, with us today, I learned a ton and I think our audience did too. So definitely appreciate it.

Sam Ovet: Cool. Well, thank you for having me on, I was happy to be here. Maybe we can get Josh on next time. Cause he's got a whole different kind of perspective that he brings with the experience of, of being he's older than me, you know, he's my dad.

Ron Brooks: Yeah, no, you know what? That would be tremendous. Sam, we should set that up and have, uh, you know, you and your dad come in as a father. Um, because I think there'll be some nice comparison contrast, uh, there, you know, with that, that'll be great and, and again really helped folks. So Sam, thank you so much, man. I really appreciate it. Take care, uh, best wishes to you and your family.

And um, like I say, look forward to connecting on the next round. Yep. Awesome. Well, so that will Sam Ovet our guests today. Uh, MYB community, the founder of mobile pocket office.com. Again, make sure you go there. It's right in the show notes. Uh, go check him out, learn a little bit more connect with them. If, if you're in a, um, you know, a place of your business where you're ready to automate net new, there's no better time than now.

And, uh, let let's say I'm in this team, uh, you know, be a resource for you. Um, and you can never have too many resources. So let them be a resource in, in helping you automate, uh, pieces of your process, uh, to make your business, uh, and the impact that it has just a little bit better. Don't forget. Champronbrooks.com.

You can connect with me, uh, got some great things going on, some great things that it will be coming. Uh, some upcoming webinars that I'll be doing, uh, again, just to, um, help bring information and kind of tied. And have you connect with me a little bit, um, some of those will be, you know, very inexpensive.

Some of those will be even some free webinars that I'll be doing, but, um, go there and get signed up, you know, we don't spam or anything, that type of thing. Uh, so I'll send you very minimal information, but what I want it to be impactful to you as well. Listen, there's three areas. I talked about this when we started the podcast, but you know, always like to end on this note, um, there's three areas that unite us all.

Um, that we all have the pursuit of no matter how we look in the mirror or what side of the train tracks that we come from, we all want to be a little better for ourselves, a little better for our families and a little better for our communities. And if we can keep that in mind with

every interaction that we have, we'll make this place just a little bit better for all of us. So listen, go be great. Um, uh, be aggressive and, uh, be your very best, uh, as you move forward, Champ Ron, Minding Your Business Podcast