

## John Golden's Sales POP! Podcast: The Need for Automation and Digital Transformation with Sam Ovet

**John Golden:** Hello and welcome to another expert insight interview. My name is John Golden from sales pop online sales magazine, and pipeliner CRM joining. It was usual from San Diego and today I'm delighted to be joined by Sam events who is in Boulder, Colorado. How are you doing, sir?

**Sam Ovet:** I'm doing good. I mean, I'm really, really excited.

**John Golden:** Yeah. And sam, along with his father is the founder of mobile pocket office. And what we're going to talk about today is augmenting human and technological resources to leverage growth and streamlined productivity and sales. Okay. So, um, some, let me pose this to you just to begin. Yep. Uh, pre pandemic. A lot of people talked about automation and digital processes and digital transformation and all of this stuff, but a lot of companies really kind of paid lip service to it.

And, and when times, and when times are good, you know, we, we, you know, we're very good at overlooking, you know, inefficiencies or, or manually finding workarounds and all of that. Now I think the pandemic. Certainly focused a lot of companies and they realize number one, efficiency will kill you when you inefficiency rather will kill you when you're confronted with some kind of disruptive event and digital processes.

Well guess what? You can no longer pay lip service to them.

Let's say you. Here's the deal. We as humans typically don't respond until we have a dire crisis. And what was the dire crisis here with the pandemic? It was the bottom line that sales couldn't happen the way they used to happen. And so they weren't happening.

And I think that was the number one driver, because it was just the biggest influx of interest in need that came to us during this time. Because of course, what we do is help people design and implement automation in their business. Know, turn, turn that business individuals that are within the business into a bionic, you know, machine, so to speak, but using digital tools.

Um, so we like to talk about wrapping people in this bionic suit of digital tools that helps them be more efficient with the same amount of work or less. But that said you're absolutely. The reason it happened is because there was a pressure and the pressure was not all the random little things. It was the bottom line that sales couldn't happen the same way.

And we all know that sales covers a lot of sins. So if you have sales, you can afford to be inefficient. You can afford to do things the old way, the slow way, the manual way. But as soon as those sales stop happening now, you don't have a choice and it forces the hand. And that's why. I think that we saw this big influx and absolute need for it because people were literally going, Hey, I can't make a sale the way I used to.

I don't know how to make a sale now. Apparently digital tools are the way to make this happen.

Yeah, no, a hundred percent, a hundred percent agree with you. And I think also, uh, and one of the things that maybe you can talk about here is when sometimes when people hear automation, they immediately equated with replacement, right?

So they think, oh, automate means. We're going to replace people I'm going to be replaced. But the reality is that, I mean, the first place you really should start with automation is routine rows, repetitive, low value tasks, because at the end of the day, you want to free up people to do high value work.

**Sam Overtt:** That's right. So what I, what I look at it, we, you know, we have a particular lens that we like to take a look at it through. And specifically with automation. And I'm going to come back to that. People losing their job, because there is some truth to that. That's the raw part of it. And I'm not going to beat around the Bush, but there are, there is, there is nuance.

Who's gonna lose their job. Who's not, um, and a lot of times people don't lose their job because of that nuance. Um, but what I do is I tell people, look, what do you want to think about automating? And you said it, the routine rote things. So if a computer. Or a digital machine could do the task and the customer, the end user customer does not know the difference.

And it does not impact the customer experience at all. Then a computer should be doing it. If it impacts the customer experience at all, then you need to think twice about whether it should be automated or not many times it can be, but there are times where it shouldn't be back to the nuance. Whether or not people will lose their jobs.

The bottom line is automation does take jobs away. However, most of the time in many companies, people doing the work that should be automate. Aren't hired to do the work that they're doing. They're busy with this busy work and they're getting swamped by it. And they're hired to do something creative they're hired to sell they're hired to do strategic work.

And that really is where their value is it, but it just so happens that systems aren't in place processes in place to actually carry out the busy work, the automated. So if you free that person's time up, then they're back to actually usually just a normal day. They're not overworked and ready to quit at a moment's notice.

So that's the other thing. And you know, that's business owners, that's employees. I see it across the board. People get hired for one thing. And then because busy work has to happen to make the business run. It's not automated. They're now doing the busy work and that is the kind of thing. That's the routine.

Task the road task that's says, as we automate, because you have this, you've just probably paid a lot of money on a yearly basis. How healthcare, everything you can imagine, right?

That goes into hiring people that you want, that you really want that person doing that strategic work. You want them doing that creative work.

You want to be that sales conversation work because that's, what's going to grow your business, but they're stuck. Busy work, maybe 50% of their time when they should be more focused on that. So that's why people aren't going to lose their jobs most of the times, but there are situations where people lose it.

**John Golden:** Yeah, no, absolutely. And I think, uh, and I think part of it as well is I think. People traditionally, maybe have a, or people have maybe a traditional view of automation and they think about automation as end to end. So, as we said, it's like, we're going to automate all of this and replace this personnel.

But the reality is now with the tools that we have is that you is that you can have that combination of human and automation and they work together at different points of your process. And I think that's where the big change is probably.

**Sam Ovet:** Yeah. And especially in the sales side of things, you know, I mean, we all have this automation first came on the scene really visually and in this scary way for a lot of people in the manufacturing sense that Hey, manufacturing automation is taken away jobs and the answers, you know, it is, you know, but it's also making new jobs.

It's making higher, paid higher skilled jobs. People have to manage design and keep, you know, automation does have to be managed. It has to be paid attention to. And so now you've hired someone who's got. Higher paying job to do the management work of actually paying attention to the automation, which is a really exciting job.

It's really engaging. It's going to pay better. Um, but so that's, I think where that automation fear comes from and it's founded in that way, but on the sales side, the reason, yes, if you have a good marketing team going out and getting you a lot leads that then you are working with as a sales, you know, as a salesperson, you should be.

In an ideal world. You're having closing conversations all day long, what a dream. And so if you can use automation around that process to follow up with the prospects that aren't ready to make a decision today. Like keep them warm, keep them interested, make sure they know what's going on and aware of your business.

Boy, you've just really put that idea of a bionic suit around yourself where stuff is happening at. You're an augmented individual and in a perfect scenario when it's done really, really well, you actually have more time. And the majority of your conversations are closing conversations versus.

Prospecting qualifying conversations because automation has done that kind of work for you. Yeah, no,

**John Golden:** absolutely. So, so give me some examples of some of the work that you have done on some of the things that you help people automate. Uh, just so some examples, so people get an idea of the types of things that can be offered.

**Sam Ovelt:** Yeah. So one of the, and so I'm going to pepper, some examples in here because that's always helped. Um, but I w I like people to think about automation. Well, I'll say I'll give people a framework to think about automation, because it's a lot, it's a huge subject, you know, what should you automate? Where should you start?

Especially if you're a business owner or an executive thinking about where should I even start this automation journey? Sure. Manufacturing. Right? If we have a manufacturing thing, but outside of that, in the business administrative side of things, what do we automate? How do we even think about automation?

I want you to think about five things, right? You have attract, so you gotta attract new business. You gotta convert. You got to convert that bit, that interest to leads and sales, most importantly sales, but of course you have to become leads first, most of the time. And then you've got to fulfill whatever you promise.

That's the manufacturing quote, unquote side of things. That's the actual product fulfillment. If it's, if you're in a digital world it's fulfilling digitally. Um, if you're in a services world it's fulfilling in a service way, then you have delight. Most companies don't really think about this. They do it if they're decent, but they don't really think about it.

And they don't think about automating it. You want to delight your customers, give them more things to buy. That makes sense about around what they purchased, because you're going to increase their lifetime value. They're going to give them a better experience, make it so that whatever the service product or, uh, Experiences, they're getting more value out of it.

They're going to become then the next step, which is referrals, better referrals. So attract, convert the light or sorry, attract, convert, fulfill the light, refer. Those are the five stages. So then you break those down and you start to look at what are the different systems and processes that we do, right?

What are the, what's the busy work in there that we do to make this happen? And then, then you start from that point. You say, now what should be on there? And so that's the framework. And then you can start to assign dollar values to the time spent doing it, or the value that is generated for the company doing it.

Um, a good example of this, as far as work can be automated. There's I'm going to talk about one SAS oriented example. Um, and this is, this is actually. It's going to sound basic if you're familiar with automation, but super good. I book is making sure that if you're doing marketing to get people interested in your company, which you know, we all are, uh, or we should be doing, um, if you're not, is that what you've had that interest there?

The idea that if you're a SAS company, you wanna be able to give somebody the opportunity to learn about your product. Some kind of demo is very common nowadays, and it's a popular way to do it. Now it works, but you need to make sure. You are available and you can use automation to this to teach the prospect, the interested party about your product when they're ready to learn about it, not when you're online and your team's online.

And also you don't necessarily need to be so super straightforward. Piece of automation is having some type of automated webinar or demo experience that people can sign up for at the time that they're ready. And then the key is not just having that experience where there's two components around it that are really, really important in my mind.

And that I've implemented before. There's a company called sync with connects. I get it. That's the name of it that we, that is there an example that comes to mind for this firm. Um, and they were having. People do demos at various points in the month. Uh, and they, you know, it wasn't convenient for the prospect all the time.

So there are opportunities for people to really, really learn in detail about their solution. Um, we put in a webinar that was automatically running. People could attend at any time that worked for them, but it also. The chat part of it was connected to a customer service team that could actually go in and answer questions that people had.

So there was a human component to it. And then the other side of that was two-fold one was following up with those people. Yes, they watched the demo, but they need to be followed up with and reminded. They watched that demo, you know, their kids practice, they got to eat dinner. They get busy, like who knows where they're watching that demo.

What other priorities are going on? They have a crisis at work. Any, any number of things, follow up with them over at least a three week period. And you've got a good chance of taking that prospect and reaching them at a time when they're ready to have a conversation more seriously about making a buying decision or, uh, going ahead and purchasing because they know they want it.

Right. And so that's one side, make sure whatever demo you do that's available has follow-up that's automated attached to it. And then the other side of that is. When you start, when people schedule, uh, for any kind of call that would go along with the after part of a demo or for, because you can have it in both places.

Make it a two-step form, right? The idea of scheduling a call for a demo. Think about the work involved as, as someone who's, you know, if anybody here has scheduled a demo before, right. If I think about scheduling a demo, I have to think about, do I have the time in between meetings? What time should I pick?

What time slots are available? Do I have dinner plans with my wife? You know, am I, do I have other plans that after get ready for you have a project and work. There's a lot of mental energy involved in making a calendar decision. We all think, oh, just put a schedule, link out there and people schedule, but the amount of mental energy involved in the ease of not finishing that schedule jeweler, it's really easy.

So we've done this many times over, um, but putting a two-step form in place that first to capture contact information, first name, email, phone number. You could get it down to just email. If you wanted. Get that contact information that takes zero effort, right? Straight your scheduling. Now I've got that in my database.

Wherever they, it doesn't matter. I have a whole monologue on using tools, tools, pro tools, do what you need. You got to get the right tool for the job. Yep. I'll leave it at that. I've got some that I like, but outside of that tools are just a tool and they're necessary, but it's not the tool that does the work or is, you know, that's not the magic thing.

It's the process, the thought. So you get people to schedule by starting with their first name and then if they do not finish. You need to make sure that that's talking back to whatever database you're using and saying, Hey, within an hour of starting, they didn't finish. So let's remind that person with anymore.

Hey, it looks like you started scheduling a call. Would you like to finish merger information into that calendar? Make it really, really easy. Make it convenient. That's a big word. I want you to remember make it easy. Convenience wins. That's why we all use Amazon and those easy to use things. So while we all like apple, those kind of stuff, um, because it's easy, it's super easy.

Uh, and then follow up at least for another week until that person schedules or says, Hey, I don't want to schedule. And so the ability to recapture, I mean, we've seen upwards of 50% of the lead volume recaptured and scheduled in certain situations, and then buying something. These are people who you've done the hard work to get to your website, whatever it is.

Yep. Are you going to just forget about them because they have to make more decisions or are you going to make it easy? And automatically remind them now you're having more calls.

**John Golden:** And I think those are great examples. Um, especially because as you said, convenience, and the fact that we're so distracted nowadays, I'm always telling people when they say we're super busy, I go, no, you're not, you're stupid, distracted, but

**Sam Ovet:** that's the truth.

**John Golden:** So anything you can do, and then I love your example at the beginning with the. On demand demo, but having the live chat, because I mean, that for me is that's a very simple, but a very powerful example of where you're doing something that's convenient for, for the prospect or customer, because they can get the demo whenever they want.

But you're also allowing for human interaction through the, you know, enabling the live chat where that, I think that's a super example.

**Sam Ovet:** Yeah. And, and, you know, even if you run the demo only during business hours or a little up extend, if you don't have people available to answer questions, I would always say, let people do it whenever they want.

You have no idea when people want to watch the demo, it could be, you know, 2:00 AM they're in their underwear. They finally have a moment to breathe. And they're trying to figure out how to use this, this software solution, um, and introduce it. So I always

encourage you to leave it on. Even if human interaction, if you don't have somebody available all the time, even if it's during majority business hours, that's okay.

You know, that's more human action than interaction than otherwise. I think I will say there's this conversation we're having about automation, but anytime you have the opportunity to be here, Yeah. You know, and we have this tagline of course be human, where it counts otherwise automate, but we really mean it in that anytime you have the opportunity to insert a human interaction into the experience, that makes a difference.

Cause we live in a. In a world devoid of human human contact, especially during the pandemic, people are actually, I think, very hungry for that. And so if you can create a human connection, you're always going to have a better chance at making that sale. No,

**John Golden:** a hundred, a hundred percent. And, and especially, especially if you can combine it using the automation, if you can combine it with the convenience factor.

So therefore if you can humanize and make it convenient. Well, that's a great, that's fantastic for your customers and

prospects.

**Sam Ovet:** Yeah. And one more thing I'll add there is that there are parts of the process that many people myself include. Would rather not deal with a human when I'm in the research phase.

I don't, I'm not ready to talk to a human, you know, I just want to lose them. I want to find out if it's even a fit, I want to learn about this, whatever you're selling. But then at a certain point, I might need to ask some questions to a human. I want to know that there's some people behind this and it's not just a random thing that I found.

And that is the time that automation really works for you. Because now you're getting to interact with people at the, at the appropriate time, the time where they're hungry. And for that human action versus upfront, and sometimes that's appropriate, but a lot of times that can feel pushy and turn people off nowadays because we've sort of been programmed.

Oh, let me, let me push back a little when somebody is trying to talk to me when I'm doing research, but then when I'm in that buying decision, I really, I might want to talk to a human, you know, and make sure that what I'm hearing is, is actually the case.

**John Golden:** Yeah, no, absolutely. And it gets back. I think your timeline sums it up beautifully is, you know, be human where it counts otherwise automate.

And I think that's the, that's the approach that companies ought to take. As we said, go look for the low-hanging fruit. Look for those routines. Tasks and automate them and, and look for opportunities for your people to be able to engage, uh, engage with prospects or customers in a, in a much more high value way.

Um, listen, sound. This has been great. Uh, all of Sam's information is going to be below this video, but please do tell people a little bit more about yourself and mobile pocket office.



**Sam Ovet**: Well, so I'm a, I'm an ex professional athlete, turned automation, you know, nerd. Um, and so one of the things that I took is from the professional athlete side of things and doing high-risk adventure sports, which is my domain.

Prior to this, which is getting, um, more years ago, maybe then I'd like to admit at this point, but I'm in, I'm pretty young, you know, but, but, uh, that said is when you implement this stuff, one of the things I really want people to think about is look at the risk in implementing it because there's often risk in putting automation in and try and do it in small chunks.

Don't overhaul the whole business, automate everything all at once. I've seen people. Do disastrous things. Cause I think this is the golden ticket. It's not, it's not parts of it are, it's gotta be done strategically. And so think about, can I test this on a small portion of my customer's experience or my prospect's experience before I roll it out to the whole thing.

And then as far as mobile pocket office goes, you know, we are a firm that does consulting and implementation of automation and business process. And we usually start where there's opportunities to generate more revenue or save you money because that's the fun place to start for everybody. And then you're happy to keep doing more.

Um, but that said, if you want someone to guide you in this process, reach out, book a call. You'll see we have one of those. Experiences. If you want to go see that you can see it on ours. We have you put some information in before we ask you to schedule, um, our volumes been up. So we've added a couple more questions to, to filter out, um, in advance.

So that's, that's an important thing to consider as you can adjust these things, but that's the deal is the automation is not the golden ticket. It's the experience the customers having to think about it from the customer's experience and test in small batches, but test quickly. And rapidly and, and don't hesitate to you.

**John Golden**: Yeah, listen. Fantastic. Sam, thank you so much. And we're big believers in automation here. Uh, again, my name is John Golden Sales pop online, says magazine piped on a CRM. Thanks Sam, for a very, very interesting insights today, I would encourage you to go check it out or go check out. Um, sounds offering because you know, automation is, is the future.

Um, it's rapidly, it's rapidly coming upon us. If you're not looking at it now, you really want to start very quickly. All right. I'll see you all for another interview really soon. Thank you. .