

The Prospecting Show: Your Business Isn't Broken, Your Systems Are - With Sam Ovet

Connor: All right. Welcome back to The Prospecting Show to date is Wednesday, March 10th. And we got Sam Ovet on the call. They get it right that time.

Sam: You got it right that time.

Connor: Double record here on the podcast, theprospectingshow.com. Um, we have Sam and he's going to talk today a little bit about his automation company.

He's got a bunch of different things that he does, but him and his dad have come together to build this kind of unique, um, system in, in process that they can deliver to other companies. And just before we kick off the show for the viewers and the people who end up listening to this, cause we only. The, uh, ADI, we don't drop any of the video and those people will know what we do in our for-profits syntax, syntax.com, very similar kind of deliverable that we have.

We're we're marketing and sales focus, your marketing sales focused, but you guys seem to go very deep in the tech stack. So I think this can be interesting episode talking about, you know, how you guys do that, how you got to where you're at. What you deliver to your customer? So let's spin it backwards.

Let's go to the beginning of time. How did you come up with this idea in the past and bring us up to today's.

Yeah. So, you know, one thing we talked about before we jumped on was that the, we run this together. My dad and I were partners in the business. And so beginning of time, you know, Josh Bates, my mom births me, I'm in the world and that's, that's the very beginning.

And then from that, I'm raised around someone, who's an entrepreneur all their life and running their own business from when I, as long as I can. My dad. And he did business process analytics for big manufacturers for a long time. That was his focus. And I was, I w I, you know, I grew up, blah, blah, blah, went to college.

And then I was kayaking, whitewater, kayaking, professionally, and guiding. So I was out running waterfalls, you know, guiding people down trips rivers in, in America and equity. I love her and what I found, two things. One was you don't make much money doing that, but it's a lot of fun. And number two is I want her to be on the right side of automation.

And I realized as an athlete, you're part of the marketing budget because who do you report to you report to the head of marketing? So when you look at it, you, you, you know, I started to realize, well, I'm using automation myself for the social aspect of marketing, right? I'm scheduling posts too. I'm out of some expedition, whatever it is.

I'm making videos, get them out there. And I'm also at this time, chat with my dad about it and realizing, okay, I want to make a shift, right? This is super fun, but I want to make more

money. What, where do I want to take this? And around that time, mid shift was like, I want to be on the right side of automation, but automation conversation, for whatever reason, like I was listening to it a bunch.

I was hearing podcasts about it and I was like, damn things are getting automated. If I want to do this right. If I want to like set myself up for success. Young still, but like younger, even kayaking around the world. Super fun. But like, I want to, I want to be on the right side. So we looked at it, we said, well, Josh has experience in business process analytics, six Sigma Kaizen lean process, the whole deal.

So I was, I was raised around that and really involved with it. He was super communicative about it. So that was part of my DNA if you will growing up. Um, and then I had this passion for. The marketing side of what I was doing with the whitewater things and the athletic stuff. And so we said, well, why don't we come together and see if we can take the process oriented mindset that you're doing with everything primarily fulfillment beyond, right.

And, and do it at the top of the funnel for people. Once they get that lead through to fulfillment. You can help somebody improve that part and guess what? They've got a lot more problems down the line. So X whitewater professional kayaker turned into automation, mega nerd, trying to help people. And what we do with people is grow their business, using automation and help them give them the tools to sell.

Rapidly.

Yeah. And so what are the types of companies that you guys work with? Cause I know at the end of the day, there's a lot of different kinds of subnets, right? There's direct to consumer companies, there's B2B only companies or service companies, product companies like where do you guys kind of niche down and to be like, Hey, this is really good fit.

We can help the most. We enjoy this. What, what is that thing for? You guys

Sam: have a little drop, like a little nugget there that I've learned that this says somebody people can take. In our case industry doesn't necessarily matter, but revenue and process and the amount of need they have to scale does. So that's the niche.

If you will, for us, if you're not doing a consistent half, a million dollars in revenue or more, that's kind of the base, that's the baseline, then it's not gonna. Because what you're doing is you're rapidly evolving your processes so much. I mean, you know, half a million dollars in revenue is not it's, it's, you know, you're doing something right, but it's not that much at the end of the day.

Um, and so if you're at that point, usually you've now established process. You're doing things very repeated. And you're adjusting more of your marketing. Like what's attracting people, but you figured out how to get conversions to happen. You figured out how to fulfill whatever you're fulfilling now is a good time to invest in process and automation prior to that, probably not.

You're changing too much, too fast.

Connor: Got it. And that's actually a really valid point too, right? Because I think at the end of the day, there's a lot of these really lean companies that are starting out, you know, founder, co-founder maybe two people, three people in the business and just trying to iterate, iterate, iterate over and over again, change this out new rule, new compliance then iterate again.

And they can't, they can't slow down enough to actually build. Right. And so like, even if they had you, they couldn't change their process or they can slow down their process to be, um, something that can be considered. Fast enough. So they, they really can't use you, but once they get over that hump of that 500,000 now, it's like, okay, well, people come in from the sales channel, then they do this.

Then they do this and then they do this. There might be some variation within each step. Right, right, right. So they're coming all the way through. What, what kind of companies or processes do you focus on? Right. Like, like, I know you talked about the, the revenue, but like what's something that commonly people are like, Hey, this process is messed up.

I'd like to automate it. Give us an example.

Sam: So a great example of that, that I see all across the board is that there's two different things. If you're an enterprise company, it's your salespeople. It's automating the followup of salespeople once they get a lead, because they're just chasing that hot lead.

They're not following up and losing a lot of opportunities. So number one, that follow up, educating people for what they said they're interested in, who may not be the hottest prospect. But he's probably going to buy six months from now, for example, that's on the enterprise level, come down to more mid-market level where this is a great example for like SAS companies.

We see this pretty commonly automating their actual ability for people to learn about them. So you've done all this marketing work to get somebody to your website now. You need some kind of way that they can learn about you. Simple thing is an automated evergreen webinar about your product that people can schedule their own demo with to start learning about it.

And then you're following up with them on some kind of demo booking call and automating that whole demo file all a process. So you're not losing leads. Got it. Okay. That's good. And there's one more, uh, which is the idea that this is automation automating some of the reporting that you do on your tracking.

So that, and this may not seem immediately obvious, but automating some of the reporting you do on your tracking so that you know, what's working and what's not because if you don't know then your heart, you can't make improvements. Right? Super basic concept, super important. Most people miss the boat.

They have a lot of data, but they can't make decisions. Right.

Connor: Right. And that's also like an influx of just too much, right. Volume wise. I think a lot of people that at least that we talk to, uh, in our businesses, the reason they can't make good decisions because they don't know where to look first of all, and then they don't have the data.

And then if they do have the data, they got too much of it in can actually interpret it.

Sam: Right. So I think those three specific piece to look at it. Yeah. Okay, I'm going to look at this and this is the decision I make with this piece of information. And now I know exactly what I'm going to go, try and change and a methodology to make improvements.

That's the other thing, it's a whole nother conversation, but it's definitely part of the conversation because if you don't have a methodology improve, I see people try to make changes with a big business that's working and they blow the business. And then they like put it back because they're changed.

Didn't work. So there's a methodology for reducing the downside of the risk when you make that change and then scaling it to the rest of your, your practice, you know, whatever that may be.

Connor: And so walk us through what it looks like for somebody to work with you. Cause I know you have this consultative component and you got this build component, then you kind of have this like maintenance and support.

Yeah.

Sam: Retainers, what I'd call that last part, you know, with a little bit, yeah. Um, but here's how it, here's how it rolls out. It's really straightforward. Step one, we have an intro call. Like, is it even a fit? Do we like you? Do you like us? If there's not a jive grout, life's too short. If we're not having fun, it's not happening there too.

If that passes and you're able to invest in this, we do a call with you over a period of oftentimes it's three or four sessions over three or four days. We're mapping. The actual customer journey that exists in your business. And if you're in that target of, you know, that amount of revenue and more, you have process that you need to map out, right.

If you're lower, we've seen people come in and try it. It doesn't work. It'll have processes that go, oh, I don't have anything there. And it's like, yeah, it's not a fit. So. Someone in that room, we're going to map out the customer journey. We're going to look at five pieces of business, attract, convert, fulfill the light and refer.

So let me just dive into those real quick attract most of our customers and got that figured out. They want to improve it, but they know how to attract interest conversion. That's the, that's the money, right? Right. If you know how to track and you can improve your conversions and you can also increase the lifetime value of each customer through automated process, bam, you're making more money.

So we focus on that one heavily. These are processes, right? So that's the system. We look at the processes within the system and then. We get there. Next is fulfillment. We look at your

fulfillment process, cause there's always opportunities to make more money along the way during the fulfillment that leads you into the next stage, which is delight.

Most people stop there. Good businesses don't but most businesses do, they don't think about how can I delight this customer with other things that we sell that would make the experience where they just bought better, right? Whether that's services, products, upsells, all that kind of stuff. And also just information.

So people use the product or service more better. And that leads to your next one, which is referrals. Most people get some kind of referrals. Majority of businesses do not have a system, right. That's in place to make sure that they're asking for referrals at the right stage every time with every customer and or catching mistakes that they've made, if they have a high volume of customers and being able to get those before they get out as bad reviews in the world, take care of that.

Turn that customer into a raving fan. So attract, convert, fulfill delight, refer, we focus on those five processes. We figure out what you're doing in those today, where they could be improved. And then we find out what can be automated. Two things for automation. One is what can save you time, right? And money that you're paying to do that has to happen to make your business run.

That's the busy work of business. If you can automate that out. It's consistent. It's not done by a human. It helps you scale that one's simple, right? That's easy automation to think about. The other one is where are there opportunities to make more money? So that's the two sides about automation. So how can you use automation to create a customer journey that improves the lifetime value?

The average transaction value of each customer at each stage. And then of course the attracting is the number of new customers, right? People have heard it before, but that's how you grow a business, increase the lifetime value of customer. You know, how much they spend with you over the lifetime increase the average transaction value of what they spend with you.

You know, you got one product, bundle it in with another bam you've made more money. You can afford to spend more to get that lead and then getting. More new customers, but that's, that's the creative work of advertising content, whatever that is, to get people, to attract partnerships, to get people to you.

And then if you have an automated process to move people through that funnel, All the way through and fulfillments good delights, good refers, good. Your business is going to be able to grow.

Connor: Yeah. And I think that that's really important, but you, you brought, you kind of threw a piece in there that I don't know if everyone picked up on really quickly, but the piece was, uh, you can afford to spend more if you're more optimized, basically as kind of a roundabout way of saying it.

And I think. Important part is like, if you automate and you take your cost on the backend down, that means you're more profitable. Right? Which means you can afford to

Sam: spend more think about their advertising costs. They don't think about their total costs. And you got to throw that in, right? Like if you're paying somebody to move data around versus a system that you built once and paid for, and now you just maybe pay for the tool recurringly, that's an enormous.

Savings opportunity. You know, people think about like the higher human right minimum, like, you know, 50 grand it's like, like you could get 30, like that's, you're not going to get much talent, you know, uh, at that 50 is like kind of the minimum that you gotta be thinking about. And, uh, if you invest it. Half that, or all of that in automation, that's never going to take a holiday a sick day or anything like that.

Then you can hire really creative people with the recurring money that you would spend on getting more people to show up at your door and be aware, you know, hire the marketers, hire the advertisers, hire the content writers and invest money once in automation, you know, and then strategically improve that.

So anyways, it's we do that map. That's an engagement. And then from there comes out of the plan for what we're going to build initially with you and your business. Um, and it's very custom. It's very dialed in to, you know, each businesses is, has similarities, but they also are all unique. So that is a custom plan for you.

And then that comes with a price tag on it. We build that for you. And then from there it's we give people the option for strategic retainers, so that, uh, and with a little bit of maintenance on systems, but mostly strategic retainers. You're going to build automation. It's probably going to improve it, but you could get better.

And so if we're sitting there working with you each month, look having a call saying what can be improved based on what's come in. What you see, what numbers do you see help you make decisions to then improve it further? So that's. That's how it works.

Connor: Yeah. That's very interesting. And so for the people who are listening to this, uh, we'll, we'll run a few more minutes here on the podcast, but what's the best way for them to find you website some kind of handles social platform.

Like what's the best way for them to learn a little bit more about, you know, this process.

Sam: Yeah. Yeah. So the best way to do it is just simply go to MobilePocketOffice.com and we've got videos you can learn about how customers have experienced it. The customers that have worked with us, not all of them, but like we have a handful up there of customers who've explained why this was valuable to them.

And so I think for me, what I want to know is, you know, Sam can sit here and talk, I can talk to you all day about it, but like, what do other people think? That's what matters? You know, what was the experience that other people had? See if you drive with that, if you do, you can book a call on the book now button, and that's going to be a call with Josh and myself.

We're going to talk to you. Go through and see if there's a fit and you know, it's pretty fun. And we're also going to see if, if we drive and if we do, then we can move forward from there. And the first step is a map.

Connor: Got it. And it's interesting. You talk about Mobile Pocket Office, right? Where you guys have this concept, maybe walk us through what that is.

Cause like, I don't think everybody who's listening to this are gonna like understand it. Like we talked about this before the show, but like what does that breakdown to be? Cause it's like kind of a pinnacle piece of, of your guys' business.

Sam: Yeah. So the whole idea, right? Is this idea that like, if you build your business in a way that's automated, you can largely just run it from your phone and maybe a mobile hotspot, but you've automated enough of the process that you've taken out, the busy work of business, because you've automated that, and you can focus on being growing your business, working on your business versus in the business.

You're mobile. You can be out, you know, wherever you want to be. If it's at the beach for you. Cool. For me, I like to ski. I live in the mountains. That's where the skis are in the background. If you're listening or skis in the background, in my office, because out back country skiing all the time. It's about to snow, potentially 50 inches at our house here above Boulder.

It was a huge snowstorm. We're putting a

Connor: sec. So, you know, just, just to wrap it up here for, for people who are listening to the show here in they're looking at process automation, you're doing more than \$500,000 a year. You're kind of stuck. You're like, Hey, we got some process. We got some things in place.

We maybe have some automation, but it's not really working or it's smaller.

Sam: The key things is your thinking. Should I hire people at that point? God, I need to hire people. That's what's going through. People's mind doing you hire people to scale this answers. See what you can automate first, then hire really creative.

To attract new business.

Connor: Got it. Yeah. So if you're, if you're listening and you, and you feel like you're at that stage, right. Where it's like, Hey, we got some process we're trying to improve the process. We're thinking of hiring people to take over some of this work or even try it. You can kind of reach out here and find if this is going to be a solution for you, because at the end of the day, uh, to your point, if you can pay once to build something that saves you.

Five hours a week for the rest of your business life, then you would never going to be able to afford to buy somebody, to be able to buy someone's time, to be able to do that. So you might as well just work on the automation process.

Sam: That's exactly right.

Connor: Yeah. Um, for all of you, um, one more time, what is the best website for, for people to reach out to you guys?

Sam: MobilePocketOffice.com

Connor: Real simple MobilePocketOffice.com. Check that out. If you get a chance to talk with, uh, with Sam and his dad, you guys will have a good time and then kind of plan through this process together. But again, if you're a business and you're thinking of hiring, but you want to automate, you know, automations a future, you know, you want to actually be in 2021 and not 1993, Tim Berners-Lee.

Um, and I think this is gonna be a really good solution. So reach out MobilePocketOffice.com. Thank you so much for jumping on the prospecting show and have a great rest.

Sam: Thank you.