

Mastering the Shift to Skimmer: How to Quickly Migrate Your Pool Service Business to Software



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Introduction

As a pool professional, you may have hesitations about adopting a software solution to help manage your business.

Concerns about the time it takes to onboard busy technicians or the belief that your current system is sufficient often keep many pool service businesses from exploring software options that could improve and streamline their operations.

However, we're here to show you how **easily and quickly** you can onboard with Skimmer and the benefits you'll gain from migrating to an automated pool service software that will help grow your business.

Today, we'll explore why Skimmer is the superior solution purpose-built for pool pros like you.



Making the switch to pool service software

When it comes to choosing the right software for your pool service business, Skimmer offers distinct advantages over other options such as DIY software solutions, pen and paper methods, or generic field service software. **Here's how Skimmer stands out:**

Purpose-built for pool professionals

Skimmer's features are designed specifically to save you time and ensure prompt payments. You have everything at your fingertips with things like:

- Pre-programmed chemical and dosage readings
- Service checklists
- Proof of service emails for tech accountability and customer satisfaction
- And in-app invoicing and payments through Skimmer Billing

No more wasting time filtering through unnecessary features to find what you need.

In-house customer support and development teams

At Skimmer, we value personal assistance. Our dedicated customer support team is readily available to **answer your calls and emails**, in English and Español, providing expert guidance whenever you need it.

Additionally, our development team **actively seeks your feedback** and incorporates it into our product roadmap.

Your input matters to us.

Improves customer satisfaction

By leveraging Skimmer's features, you can enhance customer satisfaction through streamlined processes, accurate tracking, and reliable service. Delight your clients with top-notch pool maintenance and establish long-lasting relationships.

Centralizes data in one place

Skimmer eliminates the need to navigate multiple systems or rely on scattered records. Keep all your essential data in one centralized location, enabling easy access and efficient management of customer information, service history, and billing details.

Provides easy in-app payment options with Skimmer Billing

Request, collect, and manage payments with Skimmer Billing.

Every Skimmer customer has access to Skimmer Billing **at no additional charge**, and use it to keep track of all of the work performed in Skimmer, including regular service and repairs, and adds them automatically into invoices that can be reviewed, edited, and sent in seconds. Skimmer Billing delivers electronic invoices, collects payments, and automates many of your most tedious billing workflows, allowing you to **maintain a steady cash flow**.

Say goodbye to delays and chasing payments.

Kyle with his job as an actor Jack Veira. "He was pretty influential in getting Nevergreen off the ground," said Kyle.



What to have ready before setting up your account

Before you start setting up your Skimmer account on your own or with an Onboarding Specialist, it's helpful to have the following information ready:

- **Customer list**
- **Customer service rates**
- **Tech and admin details**
- **Questions about how to use Skimmer**

#1: An organized customer list for easy import

Having your customer list organized will expedite the setup process. With this information readily available, you can swiftly move forward and start testing your instance.

#2: List of customer service rates

Gather the documents detailing your customer service rates. Having this information readily available will make the setup process smoother.

#3: Tech and admin details

Make a note of everyone you want to add as a technician or administrator in your Skimmer account. The best part is, you can add your entire team for free with no additional cost. Get everyone on board right from the start to avoid delays later on.

#4: Questions about Skimmer

Jot down any questions you have about using Skimmer. Whether you want to learn the best way to route techs or create work order types, having your questions ready for the support team will help you make the most of your onboarding process.

Setting up your Skimmer account

The average Skimmer user can **set up their account in less than a week** and **have techs completing route stops in two weeks or less**. However, most can set up the account enough to start running routes the *next day in about 30 minutes!* Take it at your own pace or meet with an Onboarding Specialist for an expedited process. Here's what you can expect from our onboarding.

Start with Onboarding

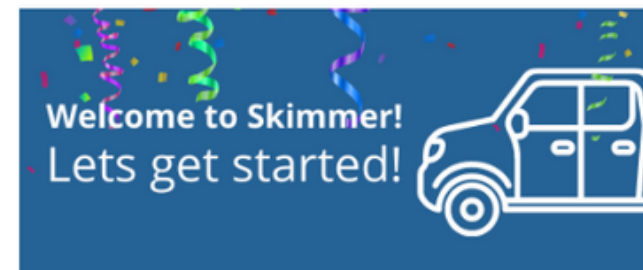
As a new Skimmer customer, you'll receive an eight-day onboarding email series designed to get you up and running on both the Skimmer mobile and desktop apps seamlessly.

Each email provides step-by-step instructions, best practices, and video tutorials, enabling you to set up your account from day one.

You'll learn how to add users, import customers, build routes, customize service checklists, and tailor readings and dosages, all to **start running routes the very next day**.

Get on the fast track to success with S

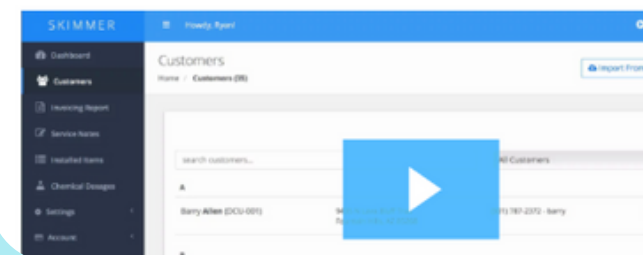
Welcome to the Skimmer community, Pool Pro! We are ha
here and excited to help you along your journey towards
way to run routes, manage work, and communicate with
and team members. Over the next few days, we will send
how to successfully set up Skimmer. It's easy! Need help
contact information at the bottom of this email.



Step 1: Adding and Deleting Users

Add usernames for each member of your team. **User acc**
unlimited and free! We recommend creating an account
member and giving them the appropriate access level: Ac

Watch a video ↘



View the comprehensive video tutorial library

For additional guidance, our extensive [video tutorial library](#) is available at your convenience. Access it anytime, anywhere, to enhance your understanding of Skimmer's features and capabilities.

Contact customer support if you need further assistance

Even after onboarding, our customer support team remains ready to assist you. We pride ourselves on offering in-house, fully staffed customer support, where a real human will answer your calls or reply to your emails promptly. [Reach out to us](#) whenever you have questions or require expert guidance.

Making the most out of onboarding

If you prefer a more hands-on approach to onboarding, you can **schedule a call with one of our Onboarding Specialists**. You can even have your entire team join the onboarding calls to minimize learning curves and days of training.

Alternatively, if you can spare an hour or two, teach your team how to use Skimmer in one sitting and reduce time away from the field.

Call us at (480) 718-2158!



***Pictured above:** Meet some members of our customer support team! They're ready to take your calls and emails throughout the onboarding process and beyond.*

What our customers are saying

Read more reviews [here](#).



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It's really nice to have **Skimmer Billing integrated** instead of needing a whole separate platform just for that. I used to have to set aside extra hours to enter and process credit card payments manually. Now, **I can do a billing run in a few clicks** and boom, there come the AutoPays and we've got tens of thousands of dollars of income to start off our month.

- **Mike Messick, Owner, All Seasons Pools**
(~200 monthly serviced pools)

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“

I've really liked Skimmer so far, their customer service is awesome and everyone I've spoken with has been so helpful. If they don't know the answer to my question they take the time to find the answer and call me back. It's so comforting knowing I can **call and speak directly to a human** every time I call or email.

- **Elizabeth Donald, Office Admin, Superior Pool Service**
(500+ monthly serviced pools)

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Skimmer is the ultimate solution for pool professionals seeking to **accelerate payments, ensure great service, and keep customers informed**. Ditch traditional methods like paper or spreadsheets, or inferior software, that fail to provide the tech accountability, functionality, and communication tools you need to do it all consistently.

Skimmer pool service software routes techs to **more stops in as little time and distance as possible**, while ensuring they deliver service that keeps pools blue and **customer complaints down**. Skimmer's **built-in payments** technology gives customers the convenient payment experience they expect - so pros get their money faster.

Our dedicated onboarding and customer support teams are here to ensure a seamless transition and help you achieve success.

Take the first step today and see the value Skimmer brings to your pool service business.

