



# Built for Busy Season: Creating Efficiency at Full Capacity

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Featuring Sarah Hoopes, Director of Operations at AE Pool Service  
*May 27th, 2026*

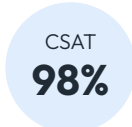
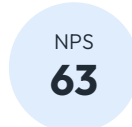
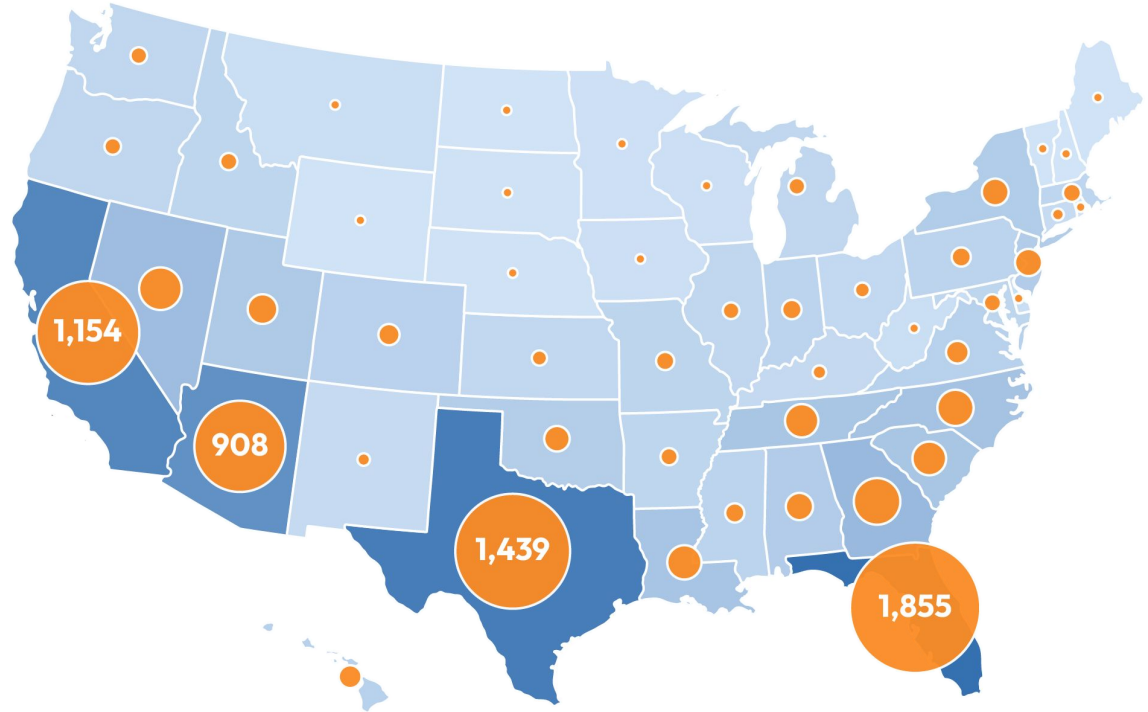
# About Skimmer

Density of pool businesses by state 0.2% 9.8% ● Skimmer customers

Skimmer has the **largest national footprint** of any pool & spa software vendor.

Over **7,500** pool service companies and **35,000+** pool professionals rely on Skimmer to run their businesses.

**1+ million unique pools** were serviced with Skimmer last year!



SKIMMER  
**pro**  **summit**  
SAN ANTONIO 2026

Friday, October 16th & Saturday, October 17th  
The Marriott Riverwalk | San Antonio, TX

Learn more & register today!  
[www.getskimmer.com/pro-summit](http://www.getskimmer.com/pro-summit)



\*The Skimmer Pros Summit is only for Skimmer customers.  
Check the website for full event details & pass inclusions.

# SKIMMER pro summit

SAN ANTONIO 2026

## The prize pack includes:

- One pass to the Skimmer Pro Summit (a \$750 value)
- Round-trip economy airfare to San Antonio
- Three nights hotel at the San Antonio Marriott Riverwalk
- \$200 prepaid VISA gift card

**Contest opens tomorrow!**

<https://thepooldeck.getskimmer.com>



# Presenters

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**Sarah Hoopes**  
Director of Operations



**Niki Acosta**  
Director of Industry Relations



# Agenda

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- Backyard efficiency
- Preventing go-backs
- Route optimization
- Cross-training & team development
- Time management & communication
- Setting homeowner expectations
- Preventing burnout
- Making your software work for you
- Q&A



# Why Efficiency Matters

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Repetition may be boring,  
**but ultimately it is efficient**

# Why Efficiency Matters

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- **Profitability**
- **Team performance**
- **Customer Satisfaction**
- **Capacity without adding chaos**

Harvard Business Review states *“Companies that streamline operations can reduce labor costs by up to 20-30%. Efficient scheduling and task management allow for more jobs to be completed in less time, leading to higher revenue.”*

## KEY TAKEAWAY

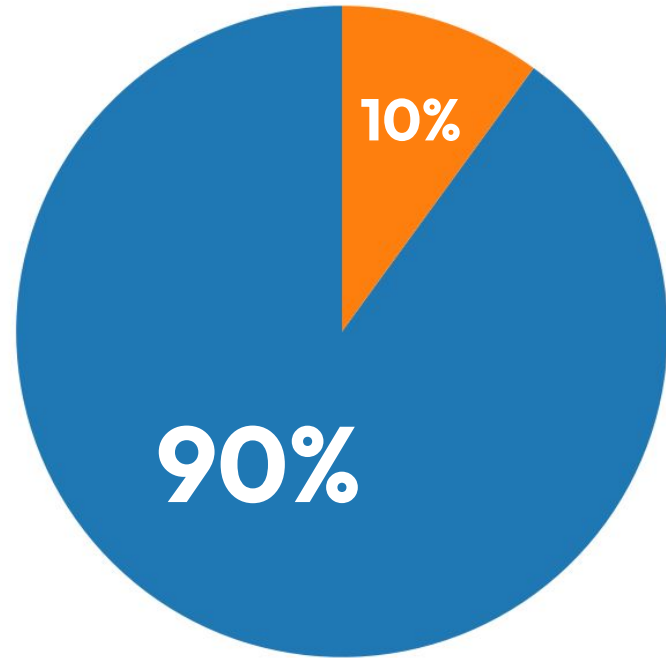
Micro changes in your day to day create a MAJOR long-term impact

# Backyard Efficiency: Turning equipment into an employee

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90% of what the homeowner cares about is the cleanliness of the pool, 90% of what a pool company should care about is the functionality of the equipment.

**A clean pool is just a bonus!!**



# Turning equipment into an employee

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## Pump

- Set up to run 24 hours day
- If the pump isn't running your pool isn't cleaning

## Filtration

- Routine filter cleans
- BONUS: this is a huge revenue generator

## Cleaning Systems

- Saves both time and money

## Chlorination Systems

- Helps prevent go backs

### KEY TAKEAWAY

Small adjustments save significant time across every route

# Preventing Go-Backs

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Nothing throws a wrench into your day like having to go to a house that **you didn't plan on going to.**

# Preventing Go-Backs

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## Preventing algae proactively

- Proper/frequent brushing is the easiest way to prevent algae
- Multiple trips/Multiple days

## Equipping techs properly

- Standardize what is on the techs trucks
- Apply rules across the board for employees

## Improving issue identification

- Recognize which houses are a struggle or which employees are struggling
- Learning how to identify patterns

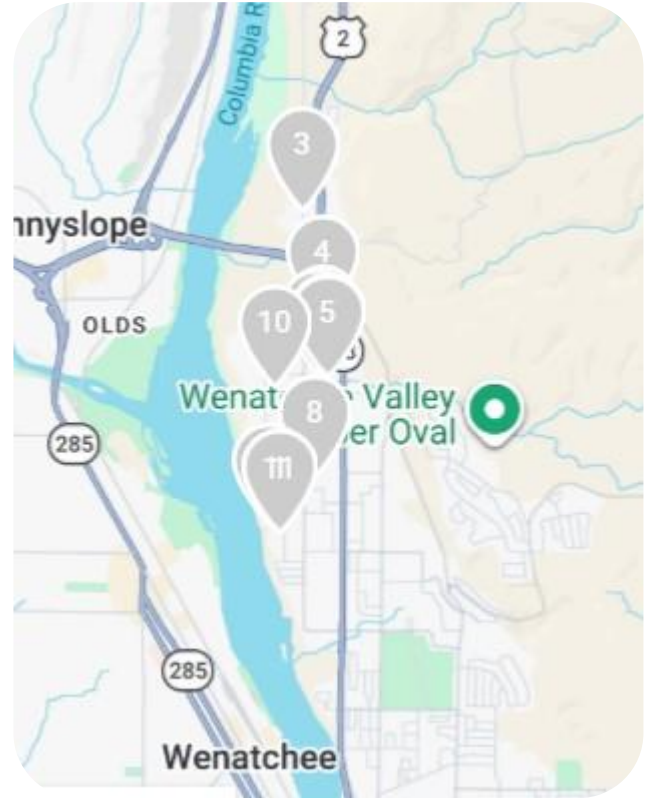
### KEY TAKEAWAY

Getting it right the first time saves time and money

# Route Optimization & Localization

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Whether you service 10 square miles or 100 square miles **these key principles still apply**



# Route Optimization

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## Keep consistent service days

- Helps the customer schedule pool time
- Provides a cheat sheet for adding new customers

## Reduces unnecessary drive time

- Saves time for the tech throughout the day

## Planning expansion effectively

- What days are close to a new area?
- How much extra drive time are you adding?

## Prioritize profitable routes

- If you have one pool far away from everyone else - is it worth your time?
- Charging appropriately for distance

### KEY TAKEAWAY

More pools does  
not always equal  
more profit

# Cross Training & Team Development

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Cross-Training: because panic is  
**not an effective backup plan.**

# Cross-Training & Team Development

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## Cross-train technicians

- Prevents having to make multiple trips to the same house
- Provides opportunity for growth

## Standardize notes/Communication

- Anyone can look at the notes and see what needs to be done
- Formatting information

## Using senior techs for training

- Creates accountability
- Strengthens onboarding

### KEY TAKEAWAY

Better trained teams  
reduce interruptions and  
improve consistency

# Time Management & Effective Communication

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Microsoft's 2025 Work Trend Index found that office workers are interrupted up to 275 times a day, **roughly every two minutes**

# Time Management & Effective Communication

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## Reducing interruptions

- Set parameters with employees
- Set a schedule for do not disturb on your phone
- Research, pick & develop a time management strategies

## Delegate

- Delegation is assigning work
- Effective delegation is assigning ownership with clarity and support

## Using canned emails/templates

- Create them once, send them forever

## Setting clear expectations

- Times for call backs, how route stops go, billing...etc
- Making an exception to the rule

### KEY TAKEAWAY

Consistency improves  
both efficiency and  
customer experience

# Setting Realistic Expectations

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The fastest way to disappoint  
a customer is to **create an  
expectation you can't meet**

# Setting Realistic Expectations

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## Setting realistic timelines

- ASAP should not exist
- Respect their time

## Communicating proactively

- Especially where money is concerned
- Newsletters/Monthly emails

## Avoid over promising

- Quickest way to lose the trust of a customer
- Sends homeowners on a wild goose chase

### KEY TAKEAWAY

Clear expectations  
reduce frustration and  
increase trust

# Preventing Burnout

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**Burnout doesn't happen  
overnight** – it happens when  
stress outweighs recovery for  
far too long

# Preventing Burnout

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## Busy season pressure is real

- Prepare in the “off months”
- Recognize the symptoms of burnout in yourself and employees

## Better systems reduce stress

- Create processes
- Manage systems

## Sustainable growth requires sustainable teams

- Your employees can't go anywhere if their tank is empty

### KEY TAKEAWAY

Efficiency protects both  
your people and your  
business

**Make your software work for you**

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Because sticky notes  
and memory **are not**  
**scalable systems**

# Making your software work for you

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## Automate repetitive tasks

- Set once and forget it

## Improve communication

- Look at a CRM as a way to protect you and your business
- Techs providing information to the customer in the field

## Track operational trends

- Lets you plan ahead to avoid rushing around for product
- Tracks profitable routes and services

## Increases visibility across teams

- All supervisors have the same information
- Creates its own checks and balances

### KEY TAKEAWAY

Software should simplify operations, not complicate them

# AI Phone

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# AI Phone

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- **Never Miss a Lead Again** – AI Phone answers every call, even when you're in the field or after hours
- **Custom Knowledge and Transfer Rules** - Capture pool information, handle common complaints, and transfer calls based on preferences
- **Turn Missed Calls Into Revenue** – One Skimmer customer has generated over \$30k in quotes after enabling AI Phone
- **Built Specifically for Pool Pros** – Trained on real pool industry knowledge to handle customer questions intelligently
- **Enterprise-Level Customer Experience for Small Businesses** – Compete with larger companies without hiring additional office staff
- **Simple Setup, Immediate ROI** – Launch in about 10 minutes!

**3-6 hrs**

saved per  
month

**\$1k-\$3k+**

avg. revenue  
captured/per  
month

**97%**

positive  
interactions

**10 min**

to set up  
and start using

# Office Alerts & Issues (coming in June)

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# Office alerts

## Automated notifications that fire the moment an operational exception happens in your business

- Chemistry readings out of range
- Dosages out of range
- Late starts, skipped stops, missed routes
- Failed or overdue payments
- Payment method changes
- And more!

**Edit: Reading was too high or too low**  
Fires when a recorded reading is outside your configured threshold. Checked when the tech syncs their service record from the app.

Trigger Configuration

Reading \*  
Cyanuric Acid

Condition \* Value \*  
Higher Than 100

How Often \*  
Every Reading Recorded

Alert Controls

Show in Panel Send Email Urgent ⓘ

Email Delivery

Global Send Alerts To  
nidhi@getskimmer.com

Additional Staff Emails for this Alert  
office@getskimmer.com, alert-the-office@suncity.slack.com

Comma-separated. Sent in addition to the global addresses above.

Cancel Apply

Support |

**Office Alerts** Alerts clear after 7 days

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Select all Search alerts...

- Bad Weather reported by nidhi admin for Pool  
This  
5/27/2026 at 10:38 AM · Barry Allen, 9435 N Lava Bluff Trail
- Service note from nidhi admin for Pool  
What is this?  
5/27/2026 at 10:38 AM · Barry Allen, 9435 N Lava Bluff Trail
- Work order 317 added by Nidhi Singh  
Type: Repair  
5/27/2026 at 2:01 AM · Carlos Ramirez, 7421 Mesa Verde Dr
- Bad Weather reported by nidhi admin for Repair  
It's raining  
5/26/2026 at 11:16 PM · Carlos Ramirez, 7421 Mesa Verde Dr
- Service note from nidhi admin for Repair  
Limited  
5/26/2026 at 11:16 PM · Carlos Ramirez, 7421 Mesa Verde Dr
- Route stop skipped by Nidhi Singh  
Reason: The Customer is suspended  
5/26/2026 at 9:27 AM · Bruce Banner, 13510 E Manzanita Ln

# Issues (coming in June!)

## A structured, mobile-native way for field techs to flag problems at a property – right from their phone

- Tech selects an issue type, adds a description and optional required photos, and submits right from mobile
- Issues land in a filterable, sortable list on the web app, assigned a status, and made visible to the right people
- Can send an optional customized email to pool owner that is separate from the service email

**Edit: Low Water Level**  
Fires when a tech reports an issue during a service stop and syncs from mobile.

Issue Settings

Issue Name \*  
Low Water Level

Require photo on mobile  ON  OFF  
Require note on mobile  OFF

Alert Controls

Show in Panel  ON  OFF  
Send Email  ON  OFF  
Send Customer Email  ON  OFF  
Urgent  ON  OFF

Customer Email Template

Defaults provided. Edit as needed.

Subject  
{ISSUE\_NAME}

Message  
We noticed the water level in your pool is currently low. Please add water until it reaches about halfway up the skimmer opening to help your system run properly and avoid potential equipment issues. Let us know if you have any questions!

Email Delivery

Global Send Alerts To

10:57  
TestFlight

### Notes & Issues

Enter a Note

Service Note +

Report an Issue

Bad Weather +

No Power +

Repair Needed +

System Down +

Water Level Low +

**Prioritize & pick a struggle**

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You will never be perfect  
**but you can be better**

# Q&A

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Director of Operations



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**Thank you!**

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