



MAKING WAVES:

# How to Choose and Transition to the Right Pool Service Software



Everything you need to know before  
buying pool service software



# Introduction

Pool service software has become crucial to the growth and success of the modern pool pro, who increasingly recognizes the benefits of moving away from disparate solutions like scheduling software, marketing platforms, and CRMs.

Not only does software improve efficiency by providing a bunch of features under one roof, but it also allows pool pros to swap manual tasks for automated processes to get more time in their day and grow profits without sacrificing service quality.

**But how do you find the right solution with the many platforms available today?**

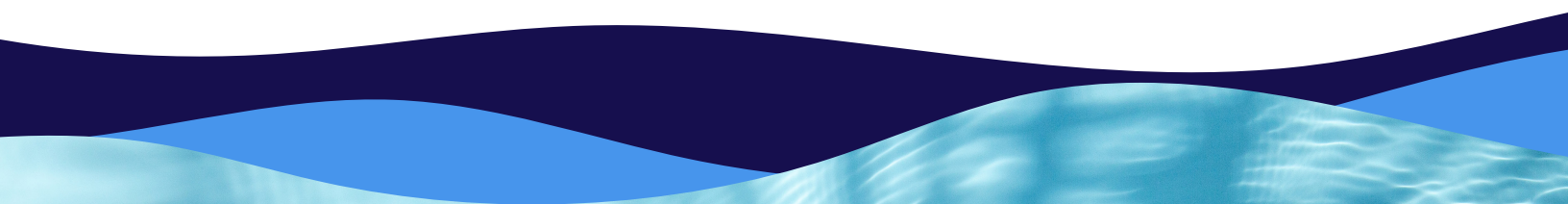

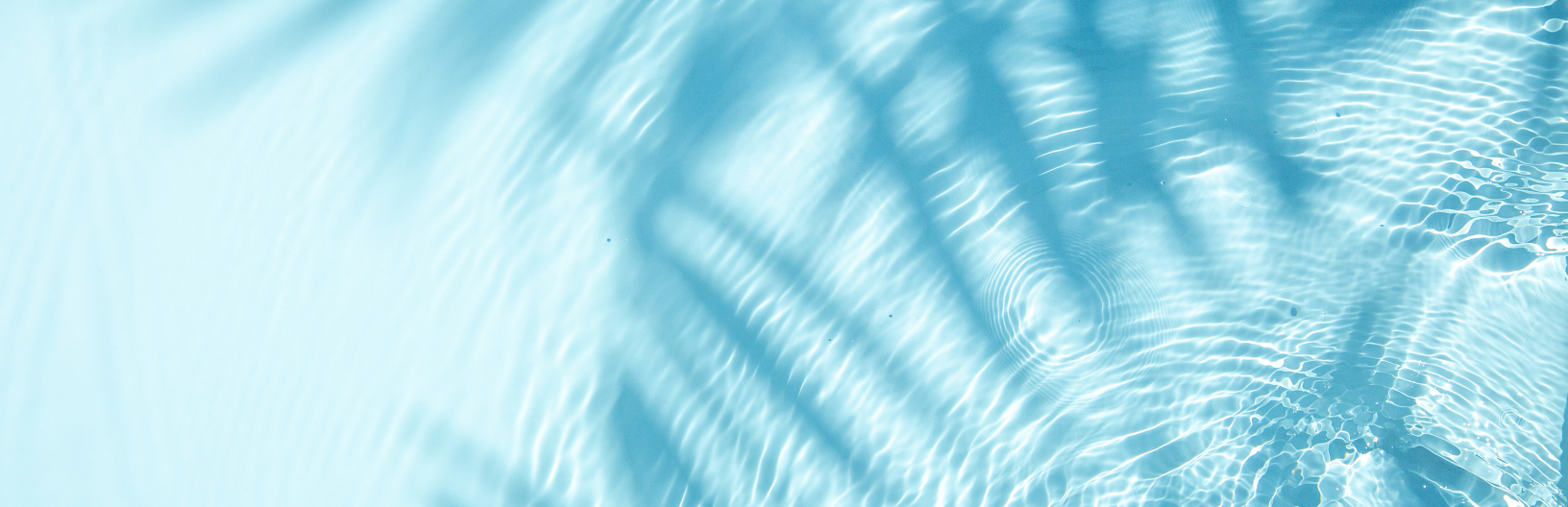
This guide has you covered—keep reading to learn everything you need to know about buying pool service software and how to make an informed buying decision.







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## So, what is pool service software?

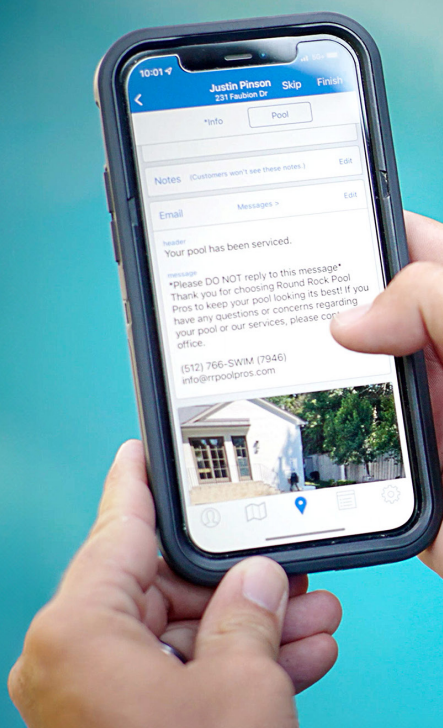
Pool service software is a centralized digital platform designed for pool service pros to manage their business operations more efficiently.

Instead of relying on disparate tools or manual processes for scheduling, billing, route optimization, and other pool-specific tasks, the software lets you manage these functions from a single platform.

There are typically two types of pool service software: horizontal and pool-specific platforms.

Horizontal platforms cater to various industries like landscaping, tree care, and plumbing and provide a broad range of features and functionality to serve the general needs of these businesses. Examples include Jobber, ServiceTitan, and Housecall Pro.

Pool-specific solutions, which generally have a leg up on the competition, are built explicitly for pool pros to simplify things like scheduling, managing routes, tracking chemicals, and billing. Examples include Skimmer, PoolCarePro, and PoolTrac.





## Why should you invest in pool service software?

Investing in pool service software helps you modernize and automate your business so you can focus on growth rather than just managing and completing daily tasks. Automating and streamlining tasks also frees up valuable time for your team to concentrate on providing high-quality services to your clients and increasing the professionalism of your business.










Scheduling on paper used to take me an entire painstaking Sunday. Now, it takes me about one hour, and it's turned this painstaking task into a fun strategy game."

**Shane Bowman**  
Sunrise Pool Service



Still not convinced? Here are more **benefits to consider**:

-  **Fewer errors thanks to automation** that reduces human input.
-  **The ability to track service history and maintenance schedules for your client's pool** ensures you stay on top of appointments and maintenance and keep your client happy.
-  **Improved customer satisfaction and an enhanced customer experience** through features that allow for easy appointment booking, automated reminders, and quick issue resolution.
-  **Better team collaboration thanks to messaging and chat features for real-time communication**, shared access to information, and collaborative scheduling.
-  **Increased profitability and better cash flow due to reporting features that help improve business decisions** and optimized scheduling and routing that minimizes fuel costs and maximizes daily jobs.
-  **Centralized data allows technicians to find and access the information they need quickly**, reduces errors that may occur when data is stored in multiple locations, and improves decisions as you can access a comprehensive view of your business.
-  **Improved compliance management due to tools for tracking regulatory requirements**, documenting inspections, and generating compliance reports. This is ideal if you operate in a region with specific regulations and safety standards for pool maintenance.

## What pool service software features should you look for?

We've explored what pool service software is, distinguished between horizontal and pool-specific solutions, and highlighted the benefits of using the software.

These benefits are encouraging many pool pros to invest in pool service software. If you're in a similar boat, contemplating whether to adopt the software, it's easy to feel overwhelmed by the many options.

A good starting point is to seek out software that offers the right features for your needs. Just keep in mind that not all software is the same.

With that being said, **here are the top features to consider** when buying pool service software:

### 01 • Route management

View all your route stops on one screen, move routes to new techs with a click, and automatically minimize drive time and fuel costs.

### 02 • Work order management

Create, track, and manage work orders in one place. Schedule recurring work orders, like filter cleanings, and send reminders so you never miss a customer stop again.

### 03 • Customer management and communication

Store all customer information so it's easy to find and access. Additionally, look for features that let you communicate easily with your customers like service emails, service texts and broadcast emails.

### 04 • Reporting and analytics

Generate reports on profitability, labor, and chemical dosages to gather data-driven insights. Make it easier to forecast chemical needs and make rate adjustments for unprofitable customers.



### 05 • Tech accountability

Features like real-time data on route progress, checklist completion status, dosage readings, and time at the pool let owners monitor techs remotely and ensure consistent, excellent service.

### 06 • Billing and payments

Manually processing payments and tracking billing eats into back-office time and impacts your cash flow. Look for software that includes billing functionality and integrates with systems like QuickBooks Online.

### 07 • Pick lists

Add parts, chemicals, or other items for your company or a customer with pick lists. Manage what's on the truck accurately, and never forget to bill for installed parts and items again.

### 08 • Service checklists

Checklists and to-do items keep techs on task. Customize checklists for every customer engagement or configure them by customer, location, or work type.

### 09 • Mobile app

Access schedules, real-time updates on job changes, client information, and job details from anywhere.

### 10 • Offline capability

The pool service software should function offline with limited internet connectivity and sync with the cloud once you're online again.



## What factors should you consider when buying pool service software?

In addition to looking for features that correlate to your company's needs, here are **12 essential questions** to ask yourself when researching various software options:

### 01 • Is it purpose-built, specialized software for pool service management?

A general scheduling tool or one-size-fits-all field service app won't be customized to your pool service business needs. The right software provides a streamlined solution optimized for your unique needs and challenges.

With a pool service-specific platform, you get finely crafted features tailored to you, like pool scheduling and equipment maintenance, and don't have to worry about dealing with extraneous features. These platforms are often designed by experts with deep industry knowledge, so they incorporate best practices and industry-specific workflows that other horizontal platforms do not.

### 02 • What is the reputation of the company?

Do they have a history of successfully delivering software solutions like this in the market? You may need to devote time to research, but it will save you money and headaches over the long term. Speak to people in the industry, research online, and read reviews from other pool service professionals who have used the software.

### 03 • How good is their customer support?

An in-house, live customer support team that answers questions quickly, provides expert guidance and troubleshoots issues will give you peace of mind in the office or the field. This is especially important if your team is new to software— don't underestimate the difference that strong customer support can make for your adoption and success with the software.



#### **04 • Does the software vendor have a dedicated software development team?**

A dedicated software engineering team that consistently releases new features to build the most advanced pool service platform makes for a more customized user experience.

#### **05 • Does the software have a well-designed, user-friendly interface that's easy to navigate?**

A simple user interface allows team members to better manage their jobs and service customers in the field. It also lowers the learning curve and improves adoption rates among technicians.

Be sure to also ask about the mobile experience as well. With everyone having a mobile phone and the widespread use of apps, any decent system will allow users to use the platform on the go to access schedules, job details, and client information.

#### **06 • Can the software scale with your business and adapt to your evolving needs?**

While having a product that meets your current needs is crucial, it's equally important to anticipate how your needs may change over time.

So be sure to partner with a software provider that can grow alongside your company and migrate you to a plan that supports your growth with minimal interruptions. Ask questions like:

- Will the software help me manage larger customer databases?
- Can it accommodate additional services?
- Can it streamline more complex job management tasks as your business expands?
- Is there an additional cost associated with adding new customers or routes?

### 07 • Does the software centralize data?

Centralized data allows you to streamline your pool care operations because it means no longer having to search through multiple platforms to access data and having a comprehensive at-a-glance view of your business. Data is readily available in one place to track and analyze trends and identify where you can improve.

### 08 • Does the software offer easy in-app payment options?

This streamlines the billing and payment process and is more convenient for customers, which enhances the overall customer experience.

### 09 • What is the total cost? Is it within my budget?

Consider your total cost of ownership, including upfront costs, software fees, hardware, implementation, maintenance, and support costs.





### **10 • How secure is the software?**

All the data, especially customer data, should be secure. Any software vendor you're considering using should use standard technology for securing an internet connection, like firewalls, encryption, and secure socket layer technology.

### **11 • Will the software integrate with other valuable tools I use? How easy is it to implement integrations?**

Any decent software should seamlessly integrate with other tools commonly used in the pool service industry, like accounting software such as QuickBooks Online.

### **12 • Is training and support provided? For how long?**

While dedicated support and comprehensive training materials should be available during the implementation stages to get everyone up to speed, ongoing training and support should also be provided.

## What are the best practices for successfully transitioning to pool service software?

Even after researching, asking the right questions, and finding pool service software that ticks most, if not all, of the boxes, you may still be hesitant about adopting software to manage your business.

Concerns about the time it takes to onboard busy technicians or the belief that your current system is more than sufficient because “that’s how we’ve always done it” may keep you from taking that leap and investing in a new solution.

But as we’ve seen, transitioning to modern pool software away from manual and separate systems is hugely beneficial. It’s also actually pretty straightforward and not at all time-consuming. You just have to follow a few best practices from the start:

### 01 • Inform your team about the plan to transition

Your team needs to understand why you’re transitioning and how they will benefit. Without this crucial first step, you may struggle to get their buy-in.

### 02 • Create a plan for moving your data

How will you transfer your data from one system or format to another? A plan minimizes data loss and ensures a smooth transition with minimal interruptions to your business.

While your plan will differ depending on whether you already have software or not, a good starting point is to prepare an organized customer list for easy import.

Make sure the format of your list is compatible with your software. Be sure to work with your software vendor during this process.

### 03 • Gather documents detailing your service rates

Review your rates and ensure your software can handle your pricing, billing, and invoicing structure. Can you easily input the data into the software, or is any configuration required? Again, your software vendor should support you during this process.

### 04 • Prepare a user training program

This will help familiarize users with the software and fast-track the onboarding process. Most software vendors will have their own training programs to get users up to speed quickly with guides, tutorials, webinars, and online documentation.

For example, as a new Skimmer customer, you'll receive an onboarding email series designed to seamlessly get you up and running on the Skimmer mobile and desktop apps.

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 to start running routes the very next day.

However, you may still want to create your own training program so you can customize the training for your employees and address internal workflows and processes. Work with your software vendor to decide on the best approach for you.

**Note:** You'll likely need ongoing training and support to address any questions your team may have. Be sure to organize these follow-up training sessions and ensure your team knows where to access any training materials should they need them.



Top software providers will also have an in-house fully staffed customer support team, consisting of real humans, to answer any ongoing questions staff may have.

#### **05 • Keep technical and administrative details on hand**

These details include server requirements, user permissions, system configurations, passwords, and key contacts. This will streamline the implementation process because no one will have to spend precious time searching for this information.

#### **06 • Jot down important questions you have about the software**

Questions could be about data security, training materials, customer support, or any specific features you're unsure about. 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.

#### **07 • Plan for the unexpected**

You're bound to have a few hiccups during onboarding. That's why it's essential to have a contingency plan that identifies backup solutions, alternative workflows, and any escalation procedures.

#### **08 • Collect feedback and improve**

As you transition to the new software, gather feedback from those using it so you can identify areas for improvement that will inform future software updates. The added benefit is that engaging with staff to get this feedback makes them feel like they are part of the process, which helps improve adoption.

## The bottom line on choosing and transitioning to pool service software

Investing in the right pool service software can help you become more efficient, reduce errors, and grow profits without sacrificing service quality.

However, finding the right solution can be challenging with the many options available. The key is to focus on the software features that matter to you and the right criteria for buying software, like whether it's purpose-built for the industry, how good the customer support is, if it can scale with you, and how easy it is to use.

From there, it's just a matter of diving right in and successfully transitioning. That being said, we acknowledge the hesitation you may have about making the switch— not only is there a time and resource commitment, but it's a big change that can feel daunting.

But by following certain best practices, you will succeed. This includes informing your team about the move, creating a plan for moving your data, preparing a user training program, and collecting feedback and improving throughout the process.

The only thing left to do is to get started today.



# Get Skimmer



Skimmer's pool service management software helps pool pros grow by ensuring consistent, premium, and profitable service across every customer touchpoint.

We do this by improving the professionalism of customer communication, helping managers hold techs accountable for their performance, and streamlining procedures like organizing routes and quote-to-paid processes for service and repairs.

See why 25,000+ pool pros trust Skimmer to grow their business without compromise.

[www.getskimmer.com](http://www.getskimmer.com)