

Preventative Maintenance Program

For

Pools and Spas



Agua Vida Design Services, Inc.
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Section 1

PMP Program Introduction

Selling the Preventative Maintenance Program

Generating a new source of income is almost as easy as 1-2-3, and this is where it begins. We lay out exactly how the program works, from Marketing to your customers all the way through to the Summary Report you'll send after each visit.

Customer Service is available for any questions you may have; hours are Monday-Friday (9am-5pm EST) via telephone (772) 794-0586 or anytime via email (customerservice@PoolPMP.com).

Section 2 - Marketing:

Mail Postcards or Brochures or hand them out to customers as you see them. When you talk to your customers about their chemistry, use it as an opportunity to offer the Postcard or Brochure. Tell them about the PMP Program and how it can help them get the most value from their pool and spa.

The examples in Section 2 (pages 13 and 14) are the front and back pages of the Brochures we mailed to our customers when we first initiated the program on 2006. It's designed to be tri-folded and mailed.

The next two pages are the front and back pages for a Postcard mailer, which can be customized and printed on your own postcard forms.

Using our pricing as a guideline, figure out how much you'll charge for a pool with basic equipment (\$295), on through more complex systems (\$495). You know your area; use that knowledge to charge what's fair for the customers in your area, and also meets your costs (including your normal profit margin).

The benefit to the customer is a comprehensive look at their pool and its related systems by a licensed industry professional who can make sure their equipment and systems are operating at top performance.

Section 3 – Program Forms:

Provide an Estimate. Using the example provided on page 18, give the customer a written estimate of the annual contract price. Our forms are generated in QuickBooks Pro2007; your forms may vary.

Once the Estimate is approved by the customer, mail two copies of a Contract (filled out with the appropriate information based on the approved Estimate) along with an Invoice. The customer should sign and date one copy of the Contract and return it with payment; the other copy is for the customer's own records.

Once payment is received, or if you are comfortable starting the PMP before payment is received, generate a Work Order (or comparable form from your own system). See **Section 5 – Customizable Forms** beginning on page 7 for step-by-step instructions on how to do it yourself.

The PMP Inspection Form is filled out in two stages; the customer information portion on both pages is filled out in the office, and the completed forms are attached to the Work Order, along with the Technician Checklist. (See **Section 4 – Real World Examples**, beginning on page 28 to see actual Inspection Forms and the Summary Reports based on that information.)

The Technician Checklist ensures that all elements are covered during every visit, so the inspection is uniform over the course of the contract period (one year, four quarterly visits).

Generate the Summary Report of Preventative Maintenance Visit, based on the information from the Inspection Form (two pages) and any notes on the Technician Checklist. Mail to the customer, along with an Invoice for any items and associated labor not covered under the PMP Program (motors; seal plate kits; filter elements and replacement grids for D.E. filters; internal heater components; control system computer boards, sensors and actuators; salt system cells, cords and sensors; underground and vessel leak detection). Before installing components not included in the program, get approval of the repair Estimate from the customer.

The replacement items included in the PMP Program are: seals; O-rings; PVC; gauges; baskets; all related labor.

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