

# IT Matters - EP7

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## SUMMARY KEYWORDS

salesforce, crm, business, data, organization, companies, built, people, evolving, tool, started, customer, space, jim, systems, implementation, data silos, aaron, listening, client

## SPEAKERS

Aaron Bock, Narrator, Jim Marascio

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- N** Narrator 00:07  
Welcome to the IT Matters podcast, where we explore why it matters and matters pertaining to it. Here's your host, Aaron Bach.
- A** Aaron Bock 00:16  
Welcome all to the IT Matters podcast. I'm your host Aaron Bock, as you heard. We were very excited for this episode of the IT Matters podcast, we have the principal and CEO of equals 11, Jim Marascio to joining us, Jim, how you doing today?
- J** Jim Marascio 00:32  
I'm doing fabulous. How are you doing?
- A** Aaron Bock 00:33  
I'm doing fantastic. I've known Jim for a while excited to get him here today on the podcast to share some of the knowledge he has with you. Jim, why don't you share with the listeners a little bit about your background, in IT and around IT and all things in between your family, etc.
- J** Jim Marascio 00:53  
Sure, sure. Without being too boring, I'll try to brush through it. So I grew up at a time when PCs were becoming popular, which basically says I'm old. And I was really fortunate. when personal computers were starting to become personal to be good to go to a coding camp as a fourth grader and start a computer club and in junior high and really just kind of grew up in the 80s as things were happening and becoming more accessible to everybody. So when I went

away to college, was really a natural fit to become a Computer Information Systems major, loved having hands on keyboard, started writing some software, and graduated and wrote some code wasn't probably the best coder out there. But really enjoyed being in and around that space. So I was fortunate to start in a large organization with a lot of opportunity for personal and professional growth and pretty quickly moved into a management role. Got to lead software engineering, and at a time at the really turn of the century. Again, I'm pretty old.

A

Aaron Bock 02:06

Well give you some more credit.

J

Jim Marascio 02:08

Yeah, when there were some really interesting things happening in the audio space. If you go back to the late 90s, early 2000s. When Napster and mp3.com are all over the news, and everybody was suing everybody in the music royalty space. I happened to be at a large media company that was doing the legal things correct. And was fortunate to kind of work myself into a role where I get to lead the transformation of the organization, a global organization.

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Aaron Bock 02:37

You know, all people don't understand how, when you were using the Napster bear share Limewire days, you download a song on DSL, and you'd wait like 10 minutes just to find out it's a horrible version or not the ravers actually one of the worst feelings in life

J

Jim Marascio 02:54

Exactly More often than not, it wasn't what you thought it was.

A

Aaron Bock 02:57

Yeah. And it was it had a virus along with it. And then your computer. Yeah, apparently.

J

Jim Marascio 03:02

Yes. So I was kind of coming of age, career wise at that time in a media company. And I got to be very intrapreneurial, which kind of influenced where my career went from there. So I didn't realize I was being entrepreneurial, but in a large business. I effectively sat down with a VP I reported to and said, ignore all the stuff they're doing illegal. We need to do what they're doing. And the comment back was, well, they're getting sued and we can I said no, we're already doing that stuff, legally. And, you know, one conversation led to another and before he knew it, I had a large budget and I was building out effectively a new division of the company, kind of wild west digitizing literally millions of songs with college students hand entering all the data for months and months and months. And we we ripped more than 2 million songs and built a

content management system before CMS was a term and built the content delivery network before CDN was a term and just didn't know I was being entrepreneurial but was doing some really cool stuff in the software space built a media player before an iPod was a thing or an iPhone was even pondered and learned a lot doing that building software and that led me to go to a startup. My first real startup in the the digital signage space transferring a lot of what I was doing with audio, and doing with video lead again a software team and I built some really cool things there and one thing led to another so my entire career has kind of progressed through the IT space have worn a lot of hats CIO CTO, COO chief delivery officer, but I've always had this component of software engineering that I was responsible for. And it all started out with fourth grade going to a to a camp and trying to write something in logo which probably won't mean anything to most the people listening to this but But it all started there. And it's been a fun ride along the way. And as you mentioned, we've got a company now a software company that plays in the in the Salesforce space and we focus purely there developing software and configuring Salesforce to help optimize it for best use for existing clients.

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Aaron Bock 05:18

Yeah, and before we get into equals 11, and what you're doing today, like you said, you've been in a big organization with a large IT budget, you were in some startups and you had bounced around CIO, CTO, etc. We talk a lot about on this podcast and different industries. What is IT to people? Why it how is IT viewed? You've seen it from all perspectives and big and small organizations? What do you see in it, where companies are doing it? Well, and what do you see where they're not doing it? Well, what are some of the common traits and common flaws?

J

Jim Marascio 05:52

Yeah, so the first thing I'll start with is you can tell a lot about how IT is viewed within an organization, by the reporting structure. If IT reports, if you got a VP of IT, or CIO, or whatever the the highest IT title is, and that person reports to the CFO, more than not, it's considered an expense. It's kind of a necessary evil, if you will, within the business. And in generally, they're focused on the infrastructure and not necessarily advancing the business forward, but kind of holding the fort what needs to be done, make sure the phones work and the network works, and that laptops work in those types of things. If you start seeing an IT organization that either reports directly to the CEO or the COO, all of a sudden, there's more of an opportunity for it to be strategic, in my opinion, the best IT organizations are the ones that are there expressly with the purpose of advancing whatever it is that that business does. So to me is I work with other companies or when I've looked at going to work for other companies, it's always been really important to understand kind of the reporting structure, and how they look at it. If it gets to interact with the entire business, and sits down as a strategic partner, and says, Well, what is it that HR needs to do to be successful? What is it that the product or service side of the business needs to do to be successful? What is it that financier, the support team needs to do to be successful, then those are generally really fun IT organizations to be in, because they're part of the business, they're not kind of regulated to just, again, supporting the infrastructure and the, you know, the wires and power and phones and that type of thing.

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Aaron Bock 07:34

Do you think that so you mentioned that where you see companies reporting structure tells a lot in the organization, whether the CIO or CTO is reporting up through the CEO or CFO? Do you typically see those organizations more on the front of the bell curve versus the back? Is that typically the breakdown?

J Jim Marascio 08:00

I think it is more likely to be on the front. I wouldn't necessarily put it that way, because a lot of it depends on what's the culture of the organization, where the board or the leadership team, depending on the size of the organization want the organization to go? Are they acting strategically to advance the organization? Are they in a difficult position where they're trying to control costs and the steps to think so it certainly helps to be structured in a way that I prefer, but how they are or where they are in the bell curve is really more indicative of the leadership of the organization. And are they moving something forward, trying to create and build that advance? Or are they trying to salvage and restore and hold before?

A Aaron Bock 08:45

Yeah, so let's get to where you're at now. So equals 11. You are the CEO of equals 11. Tell our listeners, you mentioned there already Salesforce development and custom Salesforce development, share 30 seconds to a minute on what you guys do what you specialize in, and maybe the why behind it.

J Jim Marascio 09:05

Sure, sure. So I'll step back and say I knew I wanted to build a software company. As you mentioned earlier, I've been involved with a couple startups I've come in as employee for a couple times and helped other people kind of build their vision and their dream and it's been a lot of fun. And I got to this point where I said, I want to lead the effort. I want to do this. I'm not getting younger and I'm gonna regret if I don't take a swing at this at some point. In my life, I don't do it soon. So when I knew I wanted to build a software company, the first thing was okay, what are we going to do? And right out of the gate, having been in and around and worked with a lot of software companies. I knew I just didn't want to be and there's nothing wrong with them but more of a generalist company that does a lot of fun and web app and a lot of mobile app, and that type of thing. I really wanted to be specialized. I think it helps to articulate what it is you do and resonate with people and figure out if there's a fit or not if you've got some specialty. So we looked at a lot of different platforms, if you will, CRMs ERPs or whatnot, from SAP and Oracle to people soft, the Adobe Experience Manager HubSpot, you know, tons of them, and ultimately settled on Salesforce for a lot of reasons. Number one CRM in the world plays really well from really tiny businesses up through enormous fortune 50 enterprises. But it plays really well in the mid market space. And we said, as we're building out a business, that was really where we wanted to operate was in that mid market, say 25 million to a billion dollars, you know, companies that have a budget and have vision and can work on something, but aren't so large that they're either moving exceptionally slow or, or candidly, they're not going to talk to a really small early stage business, because because of their size. So we we made a lot of decisions around how to position that. And then even within the

Salesforce ecosystem, if you're not familiar with it, Salesforce started as a as a CRM, it's still known as a CRM, it still is, however, it's built out an entirely broad platform suite of products and services, and tools that really extend from marketing technology to service to everything in between, and obviously, the CRM and sales component of it. And so we said, Well, where are we going to play in there? And how we're going to do it, we've ruled out some things pretty quickly. I know, I'm way beyond my 30 seconds here. But where we focus is on the, what I refer to as is post implementation optimization. So what does that mean? In that mid market space, we try to work with customers that are existing Salesforce users, they have some kind of pain, again, kind of stepping back to that IT kind of a conversation at the beginning of this recording. When you look at an implementation, it tends to be more of a change management exercise or more of a people and almost management consulting exercise, not as much of a technology thing, because you're trying to, to change how the organization works by implementing a new tool with it. So we said that we're really more techies. So not to say we won't do some of that. And we aren't, we are actually doing a little bit of that right now. But where we're trying to play is in this space where we come in, and there's a business that's using Salesforce, they're feeling some pain at some level, and they need to optimize it through things like integration with other business systems reporting and dashboarding, custom workflows that align with their workflow, automation, a lot of other other things like that. But hopefully that gives you a little bit of a sense.

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Aaron Bock 12:43

Yeah, and I think something you said about for anyone out there who's thinking of, I don't want to say starting just a software company, but you said, we picked Salesforce, and I feel like specializing is better, you know, and at Opkalla, we see a lot of companies who sometimes they specialize, and they do really well. Sometimes they try to do everything, and they don't do it really well. And it's very common for folks to kind of get in over their skis, say they do all these things. And then it's hard to know all these different systems, especially Salesforce, the behemoth that is in the in the space, there's so many things that they keep adding that they're doing, it's it's hard to be a specialist in more than one. So I applaud you for that. Let's take a step back in the whole market. So Salesforce, I think everyone, hopefully everyone has heard of it. If you haven't, it's CRM, customer relationship management, if you don't know what that software stands for, that's where companies are tracking their leads, that's where they're tracking their customers, their their prospects, it's all of their customer data. And in this customer centric world we live in especially, you know, post COVID, it's even more important to have a good customer management. It's kind of shocking some of the stats about CRM, I thought, you know, everyone's got it just like any ERP, which is an enterprise resource planning tool for your your organization. It's your it's your core system. I assumed when I started looking into this, everyone had it. But Jim, you might be able to share some statistics. But I have a couple here. One of the ones that was shocking to me was it said that in the next five years, there will be 12% CRM adoption growth, which for those listening 12% may not seem like a lot, but to me, I was like, Man, I didn't even know there was 12% of customers out there that are companies out there that didn't use a CRM. So Jim, maybe you can share some stats with us. Why do you think this adoption is taking place? What's going to happen in the next five to 10 years in the CRM space?

J

Jim Marascio 14:37

Sure. So for starters, the number doesn't surprise me at all. It's probably leaning more towards

smaller businesses than large enterprises. Large enterprises have been using CRM as an extension of ERPs for 25 years, but when you get into the mid market and smaller, especially SMBs you know, they're still operating on a spreadsheet. One of the areas that we see a lot of opportunity and a lot of challenge is effectively siloed data. And what that means is, they're storing whatever, you know, they've got different business processes for different departments within a business. And they're all storing that data somewhere else. So, to your point, businesses are then saying, Okay, we've got a spreadsheet here, and we've got some contact manager here, that's not really a CRM, but it's acting as a CRM. And then I've got a bunch of people over here that all have their own individual things that are built into Outlook, or Gmail, or whatever that is their contact managing. And they're siloing data throughout the business. And in by bringing in a new tool, the expectation is, oh, we're gonna solve all the problems. By implementing this new tool, we're going to centralize all the data into one place. And that poses some other challenges we can get into. But that percentage doesn't shock me at all. Just because I'm encountering it every day with small businesses.

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Aaron Bock 16:00

Why Salesforce? Like why do companies pick Salesforce over another? And maybe the caveat here is, I know, you work with Salesforce, we're not saying that there's any other systems that are not great. They're probably just as good. It's just, you know, why did why does a company pick Salesforce over another?

J

Jim Marascio 16:19

I think, first and foremost, it's the market leader, it has a proven track record over decades of evolving into what it is today. And it's, it's, you know, I wouldn't say the de facto standard, there's some really good alternatives out there, Microsoft and SAP, and what you'll find is some of the bigger ones, are built and designed to run in large enterprises. And very large enterprises, you know, billion dollar plus companies. And most of the businesses in the world aren't billion dollar businesses. And so bringing a tool that's designed to work in an organization like that, down into a smaller midsize business is sometimes incredibly expensive, overkill, more complex than it needs to be. And so Salesforce has built a really solid platform that works and kind of grows with you. So it's so there are fortune 50 companies, in fact, probably most fortune 50 companies use Salesforce, but you'll find that most \$3 million companies that are using a CRM use Salesforce is well. So it's the it's the market leader. It's designed and built in such a way that it integrates very well, with other systems, there are a ton of out of the box tools to connect it to other platforms, which is really important. If you're sending an email from Outlook, you're sending an email from Gmail, and you want to make sure that that gets recorded. And in your database. You know, it's an out of the box plugin. And so there's little things like that, that they've done a really good job building the platform. With integrations and APIs in mind, there's the current version of Salesforce is called lightning. And the lightning version was built as an API first tool. So it was designed with everything in the data being able to go in or out through some very simple tools. The other big benefit of Salesforce is it was really designed as a low code, no code tool, meaning that you don't necessarily need a software developer, to configure it or to integrate it with other systems. Much of it can be done by an administrator who's trained properly. Now the result of that is it's highly complex, because there are so many ways to configure it. But it doesn't necessarily require a software engineer to do that. And when you do want to do things beyond what can be done through

standard, no code or low code configurations, there's API's, again, that application programming interfaces that allow data to be exchanged, with other systems bidirectionally so data flowing in or out that you can bring in Salesforce developers that can then work to make sure that that all works. So they built a really flexible platform that scales exceptionally well.

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Aaron Bock 19:15

Yeah, there's a great book called beyond the clouds by Marc Benioff, the founder of Salesforce, if if the listeners out there have not heard it, I would recommend it for more than just understanding Salesforce. He's a very, the words leaving me but he donates a lot of money to charity, and he's very big on giving. And I think that's how Salesforce started. So it's a really cool story. Before we get too far into Salesforce, you mentioned you know, the small businesses is where you see the 12% growth. For let's start with those small businesses who may not be using a CRM today, whether it's Salesforce or like you said, Microsoft or another one, why would you tell someone to use what's the importance of using a CRM if you were talking to a business owner who didn't?

J

Jim Marascio 19:59

Sure How I think the first thing I touched on earlier, which is siloed data, it's important to have all of your data in one place, so that you can react and respond to your clients in the market needs. So that you can make decisions through reporting and dashboards that allow you to really understand what's happening within your business. And if you've got disparate information all around the organization that isn't, that can't be aggregated into one place, and then reported on it's very difficult to not only just manage kind of the day to day, but really see insights that are going to help you move forward. So I think that's first and foremost is kind of centralizing your data, so that everybody's going to one place, or maybe not going to one place, but they're accessing the data ultimately from one place because of integration. So as an example, if your salespeople are collecting certain data during the sales process, and pre sales process, and then you close a deal, very often that customer data is needed to service with either a product or a service to provide whatever it is your business is doing that a lot of that same data is needed. Likewise, you if you're a service related business, there's probably some support element to what you're doing. And that data carries through. So what you'll find is a lot of data kind of flows back and forth through the business, then it goes to finance because invoices need to be paid. And then somebody doesn't pay an invoice, you need to know who to contact or connect to to collect from, and whatnot. So you'll start seeing that there's a lot of common data that especially with smaller businesses, is replicated throughout the organization, then somebody changes in your client's business, and you don't have an accurate record throughout your business. So you don't know who to contact when there's a support issue, or the client calls you and you don't have any idea who they are, even though somebody else in your business does know who you are. And that ends up creating a poor customer service experience for your client. And so it's really important to centralize that data and provide access and in the Salesforce proliance, they, they talk about a 360 degree customer view. And so it's really important for all of you every area of your business, to have that same 360 view of the customer so that you can service them. And hopefully, for business owners grow those businesses,



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Aaron Bock 22:22

You mentioned, you know, the customer experience. And we'll get back to that because that's a theme. I mean, we talk with a lot of companies all across the country. And one thing we hear a lot is, I want to be able to give the Domino's oven pizza oven experience to my customers in whatever industry, meaning, if you guys have ever ordered a Domino's Pizza out there, you can order it, you can track it on the app. But while it's cool to you that you can see your pizza go in, and there's a cartoon of the guy making it etc. They're tracking your information all along the way. They see your history of ordering pizzas, they know you like pepperoni pizza on Wednesday night, and so they can send targeted ads. So there's a lot behind the scenes. Jim, a stat that I read it was on, I think it was on [crm.org](http://crm.org) or something like that, as of 2011, the ROI for every dollar spent on a CRM was 560%. So \$5.60 On \$1, you would earn more by investing in a CRM, they're saying that the number now is like \$8.71 is can be up up to 30 to one meaning you're gonna make, you know, \$30 for every \$1 you spend on CRM, and I think that goes back to the point you mentioned around data, like knowing your data, understanding your data, having your data in one one place. So let's kind of get into Salesforce from those stats. So sure, you know, like, when you talk about, you know, custom development and the importance of data. What is a trend that you see that is starting to happen in CRM within Salesforce? It's a trend or it's something you're seeing more of, and besides just you know, the importance of data, what is the trend out there that you're seeing it that you think we'll see more of in the coming years?

J

Jim Marascio 24:07

Yeah, it was really interesting report, and I can share it if you want to post the link to it later. Literally last Friday. So we're talking this thing's a couple of days old. Pulse and Salesforce did a survey of 500 CIOs globally, of businesses with more than 1000 employees. So good size businesses, not necessarily gargantuan businesses, but good sized businesses, and around the globe. So this isn't representative of a certain region of the United States or even the United States. It's a global thing. And one of the things that they saw change is related to the great resignation. So we've all been hearing about people leaving businesses and what's going on and it's created this enormous challenge for businesses because when people leave the information in their minds leaves, and so trying to automate workflows to do more with less because we can't hire. Because there's staffing shortages, especially in the tech space, and trying to utilize data better to make decisions so that when people leave the knowledge that's in their minds doesn't go with that. I mean, it goes with them, but it's still within the business has become a huge priority. And that was one of the things one of the trends that was new this year, compared to the same survey a year ago. So that's just one example that some other things that came out of it, but that one was one that really jumped out at me, because I've heard so much of quiet, quitting, and great resignation and whatnot over the last 90 days, it really made a ton of sense.

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Aaron Bock 25:44

Gotcha. What about I guess, maybe on the trend, but maybe in your experience, or from things you've read, like, what are some examples of really unique use cases that you're seeing for Salesforce that maybe weren't seen five to 10 years ago, or use cases that people are now starting to solve for with CRM and Salesforce that they weren't, you know, however many years ago?



J

**Jim Marascio 26:08**

Sure, I think it comes back to the data. And it's not necessarily a Salesforce thing. Salesforce is one of the tools but it comes back to the data, Experian data quality, did a survey of 1200 organizations a few months ago, and found that 22%, of contact records included bad data. So when I needed to reach out to Aaron, the phone number was wrong, or the email was wrong, or Aaron wasn't the person there anymore. And so huge trend there around bad data. And what we're seeing when we're talking to clients, and when we're talking to prospective clients, is discussions about how do we improve our data, so we can create a better customer experience. So we can make it easier for our employees to do whatever it is we're doing as a business. And so that we just better understand the market there, likewise, and another survey was done of IT leaders. And there's been a lot of for, I don't know, five years, there's been a ton of conversation around digital transformation, probably longer than five years. But nine out of 10, IT leaders pointed to what I was talking about earlier, which is data silos. So data being disparate throughout the organization. And nine out of ten, IT leaders said that data silos were the biggest obstacle to performing digital transformation because their data isn't in one place, they can't advance the organization. So the first challenge they have to do is say, how do we organize all this data in one place so that it can be accurately and adequately shared with various areas of the business that need it, and so that we better understand what we're doing and how we're doing it. So we can manage it, there was another recent stat that I saw from Bain and Company that said, a five, if you could increase your customer retention by 5%, it would increase your profits by 25%. So it goes back to the whole adage that it costs less to grow a client and save a client than it does to find it or than the cost of acquiring a new client or customer. And so back to the CRM aspect, if you want good customer retention, you need to know who that customer is, you know, how they're interacting with your business, and provide the right tools to your customer service team, and to your account managers and whatnot. So it's really touching all areas of the business. And if regardless of what CRM you're using, it's just important to have good data and good beta practices. So as we're again talking with, with customers, it's as much around how do we get data from other business systems into Salesforce? Or how do we get data from Salesforce into the other business systems you're using? Because sometimes they're using some other tool for account management? And so their Salesforce tools to do that, but a lot of times there's legacy systems that a business use. So how do we exchange the data back and forth? How can we change data in one area of the business? Do we get that the flow back into the primary place within the business, which is probably Salesforce, but if they're using it, but it doesn't have to be? But more often than not, it's the primary place to go within the business. So we're working with our customers to do those things so they can make better decisions and service people better.

A

**Aaron Bock 29:37**

Gotcha. So we talked a little bit about the smaller companies and why a CRM and how they should use it. You've talked about data silos being a huge issue today with companies you know, in a digital transformation, wanting to see data in a better, more consistent manner. I think any of those folks listening who have been in IT for a long time or around IT know that one of the big problems with a big system of implementation and in using it company wide is the is the actual implementation of the system. Right? So, you know, do you use all the modules? Have you implemented the modules? Right? Does everyone understand it? Are users aware of how to use it? So I know that that's a huge problem. And I know it's a huge problem and the

bigger the company, because you have to make sure that the system is implemented, right. So maybe you can speak to that, you know, what are some of the challenges there? But then, what I'd be curious of, and what you see in your day to day around this is, what are companies, they're using Salesforce today and they think they might be using it right. But there's just things that they're doing that are shooting themselves in the foot for the future? What are some of those common things you see, and and maybe advice for some of those listeners out there that are Salesforce administrators, or in a company using Salesforce? Like, what are things they can do on their own that would help, you know, prevent some of those things?

J

Jim Marascio 30:52

Yeah, I think the first thing you need to acknowledge is a business isn't stagnant. It's always evolving, things are changing either outside market factors, or things within the business, your products evolving, your clients are changing, the marketplace is changing. So thinking that you did something and it's done is probably a little bit naive. And it's really important to put in a solution that's going to be flexible and scalable for you, so that you're not constantly changing everything. But be prepared to be reviewing it and looking at how your business is evolving. And what does that mean for the tools you're using, whether it's your CRM, or it's some other system that the CRM may be interfacing with. The other thing related to that on the implementation side, specifically, is we see a lot of situations where implementations are done. And again, it's more of a change management exercise. And when it's done, it may address the needs of one department in the business. But every other department has got this Who Moved My Cheese feeling where they're saying, okay, you know, now I need to change the way I operate because of this. And that's the result of improper inadequate planning. So I think like anything else, that's a significant change in your business, if you don't plan adequately, you result in technical debt, that you have to then come back and reconcile. And sometimes, or not, sometimes, almost always, the cost of resolving and addressing the technical debt that you created by not taking the time to plan and architect in design, before you built ends up costing significantly more than the time and effort it would have taken to plan. So if you want to draw an analogy, think about building a house, if I said, we're going to build a house, and we just kind of threw up some kind of vague requirements, and then came back and I said, Well, you know, I said, I needed X number of bathrooms. But I didn't tell you how many needs to be on which floor. And now we've got to replumb the house, you're tearing down walls and running, you know, the cost to do something after the house was built, can be exponentially more than doing it when you're building the house the first time. So the same thing happens when you're doing any type of your ERP CRM, implementation and customization and integration with other systems. So take the time to understand the outcomes that are desired, plan appropriately, architect appropriately, plan for scalability and flexibility, and then build to that. And then finally, don't think it's done when it's done, monitor and be prepared to evolve and make sure that you're resourced appropriately to do that, because your business is going to change and require new needs.

A

Aaron Bock 33:58

That's great advice. And I think I can speak to that personally. Opkalla, we use Salesforce. It's funny, every quarter we talk about okay, here's the enhancements, here's the things we want to do. And it's like, alright, we got them all done. It's like well, wow, there's just as many for the next quarter. How'd that happen? I thought we got all this stuff done. But like you said,

business always changes, processes evolve, people evolve. The technology evolves, there's new things, you can do API's, etc. So you're right, it always changes. I'm curious. There is data out there on it, but I'm curious what you see. So talked about implementations, data silos. Let's go back to all CRM. So sure, large companies, small companies, what is the single biggest challenge of using a CRM for an organization?

J

Jim Marascio 34:44

The people. It's the people

A

Aaron Bock 34:48

is it not understanding why to use it? Is it is it the how to use it?

J

Jim Marascio 34:52

is it's again, a change management exercise, especially on implementation people have some way they want to do something and now you're giving them a tool. And if you think about the first time you drove a car, if you didn't know what to do, it was awkward. It was weird. And it may not you may have, you know, I learned how to drive on the standard. And I remember getting out and telling my mom, No, I've never want to drive again, because this is too frustrating to be, I'll just ride my bike. And so I think anytime you're asking people to change the way they do something, it can be uncomfortable. So recognizing and getting people to focus on the fact that the process is going to be uncomfortable, but the outcome is going to be much better once we work through it. So including everybody that needs to be done on that. And it's the same thing. And you know, again, we focus on post implementation optimization, not necessarily implementation, it's the same thing just at a smaller scale. If we're coming in, and we're working with the Opkalla team, and you need something, there's going to be a little pain, going through the process of building out that until it's done, but you've got to be focused on at the end of this, it's going to be better. And here's why. And so it's worth that cost. And it goes back to that whole adage that until the cost of staying the same exceeds the cost of change, you're never going to change. So you've got to get to the point where you say, okay, the cost, it's going to be painful, it's going to cost something to change, but it's going to be worth it.

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Aaron Bock 36:23

Well, if it helps people out there listening, we already share the ROI metrics of five to one or eight to one and 30 to one, you pick the one you want to want to use to tell the story. I've also read because we work with a lot of different folks in sales, salespeople are three times as likely to hit their quota if they're using a CRM that's well built versus not. So we don't need to dive into that. But hopefully, for those out there who are who are focused on sales, CRM is a great tool. Couple final questions for you on maybe CRM or Salesforce, specifically. We already talked about data, but like, what is a new feature that you're seeing from Salesforce, that they're rolling out or new trend features in all CRM that you're gonna see?

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Jim Marascio 37:11

Sure. So I'll say more newly being implemented. Salesforce has an AI rapidly evolving artificial intelligence engine they call Einstein. And so it's been around in evolving for a few years, but adoptions starting to really happen. And as you look at a business and you think about, we need to get data from here to there, we need to enter the data, we've got this marketing campaign that went out, we need to track this information that's coming back in a lot of those things can be very repetitive tasks, or can be predictable based on certain behaviors. So effectively, you identify a scenario, when this happens, this happens, and this happens, this needs to happen. So why have a person do that? If it's predictable, and you know what the scenario is, you know, if you think about your camera, and your iPhone recognizes where the faces and you don't have to choose where to focus, that's because Apple put and Google the same thing with their phones, put AI into it to identify the face and change the focus point. If there's parts of your business, that you can predict certain patterns. And when this happens, this happens, this happens, this is what we need to do. Managing that with humans can be really ineffective, and cutting very costly, there's more opportunity for error, there's a higher cost to do it. Taking the time to implement an AI based solution to identify, look for those scenarios, and actually handle the data for you is something that we're seeing rapidly being adopted and having a lot of conversations. But again, back to that bad data. A lot of the bad data is predictable. A lot of times it may be humans, I enter a name, last name, first you enter it first name, first. I put before the name of business, you don't want to have it on your database. Let's truncate and pull it out. You can create rules and find things like that you can scan forms and look for things that look like addresses and automatically populate the addresses in there. You can scan form, a computer can look at an email and see where the phone number is, where the email is, where the name is, and all that and automatically update your records. So you don't have to have a human do that. So being able to use artificial intelligence is huge in this space, and it's only going to get bigger.

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Aaron Bock 39:40

Yeah. And I would add to that another thing that we're seeing in our space, we do a lot in the collaboration spaces. We see a lot of monitoring down to a social media account level and tracking that data and Salesforce or CRM.

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Jim Marascio 39:54

Marketing technology. The martech side of this is huge as well.

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Aaron Bock 39:58

Yeah, it's huge. Usually because you can tell not only what, what people like, who they cheer for what their family looks like, Are they happy? Are they sad? I mean, there's so much around it. And then you think of the product marketing around it. My wife always tells me, I'm a marketer's dream. Because I see a commercial, I'm like, we should go. So within, like, you know, if they could track my eyes, like I'm watching a commercial, Aaron's probably gonna go purchase that food in about five minutes. It's pretty sad. But I'm probably in a lot of Salesforce databases out there for anything food related.

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Jim Marascio 40:33

Looking at what Amazon's done. Look at what Google's done all that, you know, the creepy thing is that Alexa must be listening me I saw this ad next to when I was here, Google must be listening. My phone's listening to me and I got presented this and that type of thing. Absolutely. There's truth to a lot of that creepy stuff. There's tools to do that. I think there's some ethical things that need to be factored into how do we do this? And how do I do it in a way that doesn't feel creepy? Because really, if it feels natural, and oh, Okkalla was paying attention to my needs. And they presented this, then there's value. If it was, you know, Jim was spying on me, I won't, I won't say Aaron would do it, then it's then it's creepy. And so there's amazing tools to do those things. And we can help you do that. And part of it is working through that user experience level, just like anything else. The UX matters, and you don't want to freak people out.

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Aaron Bock 41:32

As long as it's like, I think it was the movie in the 90s. Smart House, as long as it's getting all my preferences. Exactly right and it's delivering me, you know, the product exactly when I need it, I guess I don't care. But if it starts doing it wrong, then we've got problems,

J

Jim Marascio 41:48

You definitely notice what's wrong, or you notice when it does things that you didn't want it to know. Target got in some trouble, you know, 5, 6, 7 years ago, when it started sending diaper advertisements to people that shouldn't, you know, their parents didn't want to know that they were doing things and stuff like that. So yeah, there's, there's definitely a either an uncomfortable factor because it's wrong. And it feels wrong or a creep factor, because it's right. And it's it's not something you wanted to be so over with.

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Aaron Bock 42:21

Maybe that's our episode, a follow up episode to this is the ethics, compliance and security of all CRM. But, Jim, I know that you've got things to do. And I appreciate you coming on the show. I think one final question for you. And I've asked all my, all my guests on this show on the podcast. If you could stand in front of a million people, we'll call them Salesforce users or CRM users or potential business owners, you're speaking in front of a million people, and you give them a piece of advice about technology could be Salesforce CRM, specifically, what would you tell them?

J

Jim Marascio 42:53

I think goes back to what I said earlier, is take the time to plan. Figure out what what the objective is a lot of times, technologists, and I've, you know, I've probably made this mistake along the way to technologies can geek out a little bit and want to use technology because it's

cool and fun. Or we can say oh, that's the problem. Let's solve it. And if you don't take the time to really understand what the problem is, what the desired outcome is, what the user experience needs to be, then you'll create that technical debt again. So I think what regardless of what it is, but absolutely in the CRM and in the Salesforce space, understand what you need to be doing, what the outcome is, and then architecting the solution to a deliver that but also be in a position to be flexible enough so that as your business evolves from that point, you have something that's a strong foundation to build and grow from, rather than something that maybe you have to tear down and rebuild.

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Aaron Bock 43:54

That is great advice. And, Jim, thank you for being on the show today on the podcast. We will put some of the links that we talked about some of the technology in the show notes so that you listeners out there, have it. Thank you all for listening. Jim, thank you for joining us and I hope you all have a great rest of the day. Thanks Good.

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Narrator 44:13

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