

# IT Matters - Episode 1 (Tanner Fritz + Accounting Industry T...

📅 Thu, 5/12 2:52PM ⌚ 38:22

## SUMMARY KEYWORDS

accounting firms, firms, organization, technology, people, customers, industry, trends, automation, data, tools, tanner, professional services firms, question, perspective, healthcare, software, happening, automate, salesforce

## SPEAKERS

Aaron Bock, Narrator, Tanner Fritz

---

- 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 Bock.
- A** Aaron Bock 00:16  
Hey everyone, welcome to the IT Matters podcast. I'm your host Aaron Bock, Managing Partner here at Opkalla. We're lucky enough to have Tanner Fritz from Anduin.AI, Co-Founder of Anduin.AI today. And this is actually our very first episode. So Tanner is our guinea pig. And he is our lucky number one. So just to get started, since this will be the first episode that people hear on the IT Matters podcast, we're going to be talking about relevant matters in IT in the industry. And then what are some of the IT matters that are trends in the industry that you're hearing on the news, you're hearing inside of companies. Why is IT important? Why does IT matter? And then all things technology. So welcome to the show, Tanner.
- T** Tanner Fritz 01:05  
Hey, thanks for having me. Honored to be the first guest and excited to be here.
- A** Aaron Bock 01:10  
We're excited to have you as well. For those that don't know Tanner, he is here based in Charlotte, North Carolina. I met Tanner probably three to four years ago. When I met you, you were in a full leg brace and you had to elevate your leg on the chair at the coffee shop we were at. You're standing today, so it must be healed.

T

Tanner Fritz 01:32

Yeah, man, that was an ACL tear in my knee. That was not fun. But yeah, not fun.

A

Aaron Bock 01:37

Yeah. But we're not here to talk about your medical woes. We're here to talk about IT. So Tanner, why don't you tell everyone, our guests, about you, Anduin, your past, etc?

T

Tanner Fritz 01:49

Yeah, absolutely. So, you know, my career has been largely in the startup realm. And I have spent about four or five years as a CIO in the healthcare space previously to Anduin. And now Anduin is almost two years old, we are focused on freeing up time and cash flow for professional services firms, primarily accounting firms right now. Really enjoying the ride. It's been a wild two years. And, you know, this podcast from an IT Matters perspective is so relevant for how Anduin applies to our customers. But I think to your point, it's industry wide and all over the place in terms of how we can apply some of the learnings. So, that's a little bit about me and Anduin.

A

Aaron Bock 02:33

Yeah, and it's actually interesting, we use an accounting firm that has Anduin, and we pay through Anduin. And it has made the process a lot easier. So maybe let's start with the now, the Anduin and the accounting industry. So, you know, everyone kind of knows an accountant, they use an accountant, either, personally, professionally, they may be in accounting, an accounting career. So, from a technology perspective, where do you see challenges in the accounting industry? And maybe that's where Anduin came from. And we can expand it to professional services as well.

T

Tanner Fritz 03:09

Yeah, yeah. I mean, the way the Anduin was born, we basically went to professional services firms that we knew kind of friends of the co founders and said, If you had a magic wand, what would you fix, right with software. And it was an overwhelming trend that they said, you could help us with our billing process, both getting bills out the door, and creating a better experience for clients like you to pay the bills. That was a challenge. The other piece of the coin is, you know, the selling side of professional services firms are generally really good at executing, they're not the best salespeople. They're not they don't necessarily want to rock the boat on asked to be paid. So they want good tools to help them do that. But the transit, you know, we see are applicable to CPA firms, professional services firms and others. From an IT perspective being that, you know, the software that's in place for the industry that we work in is 20, 30, 40 years old. I mean, it is old software, and it's worked well. But now these firms are looking to move digital transformation wise and be able to do more things, unlock different integrations, and their hands are cuffed, right, their data is locked. They're living in closed

systems. And I saw this also in healthcare. Healthcare is ahead of some of the industry I'm in now, where they've made some strides on trying to, you know, have data standardization, HL7 is a big thing in healthcare, right. But we're just seeing, really the firm leaders at professional services firms say, "Yeah, we really got to have a better client experience. How do we do that?" And it's a challenge. It's a challenge to make change across a large enterprise, especially when you consider the type of organizations that we're working with. They are run by committees, partners all around these firms. And so getting a majority view or somebody who can say, "Yeah, we absolutely have to adopt this technology, and implement it, because it's going to create a better experience or save us time, save us money." That's a challenge just in the change management side of things. But I'd say some of the biggest trends we see is the existing tools out there don't play nice, right. They just don't integrate at all. And that's what we've kind of come alongside to unlock. And Anduin spent the first six months building a data translation engine that just all we do is we've now got the ability to say, "Hey, great, you work with one of these systems? Let's hook it up and we can now translate the data and apply it in these five, six different ways. Better payment solution, better collections process, better billing tools, you name it. Now we've unlocked the data to give them that capability they're after.

A

Aaron Bock 05:56

So you mentioned, and it's interesting, because Opkalla, we work with a lot of customers, similar structures, where at the top, there's maybe multiple partners, or there's many different decision makers, let's just call it that. So from what you guys see, like kind of within an accounting firm or professional services firm, what do you think the view of IT is to them? Do you think it's just a cost center, mostly? Or like, where maybe are the ones that are behind, where are the ones that are more innovative? What do they view IT as?

T

Tanner Fritz 06:28

Yeah, it's really interesting. I mean, I had a call this morning with a firm, and they reiterated that partners, oftentimes are the business owners, just like small business owners, any of these, these new expenses are taking dollars out of their pocket, right? So you really got to be able to prove the ROI. At Anduin, with everything we build, we say, "Hey, is there a 10x ROI here? Is this a 10x product feature that's going to be received? And we can really go in and have a strong argument that yeah, this is going to save you time, get you money faster, or create an experience for your clients. That's worthwhile in that regard. To answer your question, but -

A

Aaron Bock 07:10

- are they typically - sorry to cut you off - but are they, for what you guys do, you know, you're helping make payments more efficient and customers to pay on time. You're speeding up the cash process. Do they not see that?

T

Tanner Fritz 07:24

They do.

A

Aaron Bock 07:24

Do they know it is a problem? Is it a challenge that they're currently facing? And they're saying, "How do we fix it?" Or is it you guys are showing them that there's just a better option out there?

T

Tanner Fritz 07:32

It's, you know, it depends on the organization. Some you feel pretty good about their their cash flow from a health perspective, others realize that can be better. And the value of the dollar two weeks earlier is considerably worthwhile. But you know, just to go back, what you were asking, like do firms actually embrace this idea or not? It really depends on the the technology, you know. We see some technology that helped firms deliver their taxes faster, the actual tax filing, and some of them say, "Wow, that that just automates so much headache in my world, I got to do that." Others say, "No, I'm happy to have my team do that," right? When we go talk to firms, and we say, "Hey, we can get you your pay faster," that is a considerable value and benefit that they're willing to latch on to, and I think is a little bit more tangible sometimes in some software. But what we've seen, and I again had conversations with firms who said, "Yeah, looking back 10 years, you know, we looked at three different companies all the same size, and the ones who adopted and invested in technology have totally leapfrogged ahead, right? Where it's been a five to 10x growth trajectory, and others might have grown a little bit more kind of standard, 5%, 10% year over year, but not with the multiples that you'd be expecting. And so, you know, my takeaway is that those customers of ours and organizations that are leaning in, are really the ones who are going to reap the benefits. And it is an investment, right? Like you're not deciding to go from the new software, in hopes to just, you know, get the payback immediately here. This is a long term tale that you're hoping to say, "Hey, we're planning on moving ahead of the game, by distinguishing ourselves with better client experience and better operations from an automation perspective. And that's going to help us set up for long term success." That's the difference maker is in the mindset of those leaders.

A

Aaron Bock 09:21

So were you guys - and it's really cool, you touched on a lot of areas - so I was gonna ask you a couple questions, but you kind of answered some of them. But I was gonna say, organizations that do IT well, like you said, they invest in it, they take time, they plan it, they they go through the actual cycles, because it's not immediate. I mean, I'm sure you're seeing it now with the accounting and professional services industry, but healthcare is notoriously slow. Same thing. I mean, if you want to make your customer experience better, your patient experience better, you gotta invest in the technology, you got to use IT not only as an internal support, but you got to use it as an innovative way to interact with your patients. So What do you think is one of the biggest, maybe misperceptions or myths about like what IT does? Either in the accounting world, supporting accounting firms, or in healthcare? Talk about both. Just curious, your thoughts.

T

Tanner Fritz 10:17

It's great. It's a great question. I mean, it really depends on who you're asking, right? And I have conversations sometimes with leaders in some of these organizations, and you can tell pretty quickly if they get it or they don't on IT either being a cost center or being a strategic enabler. And that is the question, right, is, you're gonna know right away, this is going to be something I can do that another way, whatever that is. And being able to identify the strategic thinkers within, you know, for us, a prospect or existing customer is so critical, because they're the ones who are going to champion the entire project and really understand that, yeah, this is going to arm my organization in a way that we just haven't even been armed yet. The challenges that all companies are facing right now, like, I love that you brought this up in the beginning that there's some current events, like one of them is we're at record, low unemployment, and the jobs out there, everybody's great resignation, everybody's moving on to the next thing, means that it's really hard to find good back office people, especially in our world, right now. We see accounting firms where it's hard to find that billing specialist or that admin person who is just a rock star, because they're moving on. And, you know, the firms that we work with who are growing and acquiring other firms, they're trying to build up their teams. And it's a major talent war. And so we're benefiting from that, because hey, you know, what, we can actually free up time for you. We can automate a lot of these tasks that you're doing manually right now. And the fortunate thing is, we're not replacing anybody's job. We're just augmenting. We're coming alongside and augmenting the team that's in place right now. And just going back to your question, I mean, I think the biggest misconception, it really depends on the eye of the beholder in whom we're talking to. Is IT a cost center? This is nothing new, right? This is old news that has been talked about for decades. But I still think that IT - and actually sometimes I think there's a negative connotation with the two letters IT as opposed to technology, right?

A

Aaron Bock 12:34

Right.

T

Tanner Fritz 12:34

What a difference in a phrase IT versus technology. It's like, "Okay, oh, no, we want to be about technology. But I don't want to spend more on IT." Absolutely. Then you want to have tools and things that are going to enable you as an organization. You don't want to spend on kind of old school devices, things that you feel like are just a cost center. Right?

A

Aaron Bock 12:55

It's funny that you brought that up. So, when we were forming the name for this podcast, you know, IT - it's general, and I almost think you can use IT and technology interchangeably.

T

Tanner Fritz 13:05

Yeah.



A

Aaron Bock 13:06

But technology matters. And IT Matters is a little catchier. But I guess that brings up a better kind of question. So like when we define IT today, so like in a large organization, at the top in the CXOs suite, you might have a CIO, you might have a CTO, you might have a data officer, you might have a security officer, when we say IT, like do you consider all of that IT now? Or do you feel like IT is being kind of split into a subset? And how would you define IT both professionally and personally?

T

Tanner Fritz 13:42

Yeah, no, I think you're right on. It is the entire Chief Digital Officer, you've got product in there, you've got security, you've got infrastructure, you've got applications. So I would define it as the entire spectrum there. And just going back, I think, like the phrase IT can be negatively construed from somebody who's not in that world, right? But if you get it and you know how important managing your information, your data and your technology stack is, you understand that IT is all encompassing. There is still an old school way of thinking that says, "Oh, IT. Yeah, that's, you know, only relevant for when I need a new laptop." Absolutely not, right? So I would define IT as a much wider scope where, you know, IT and information technology is just embedded in every part of the organization now. There's very few companies out there where nobody's touched by IT. Absolutely everyone is. And so that being said, it's more and more critical, right? We're seeing the trajectory of the CEO going through the CIOs and the head of digital a lot more often. Those are the folks who are kind of being considered. "Hey, how do we again invest in the longevity of our organization? 5, 10 years from now, where are we going to be and how are we going to grow?" Well, we need somebody who can think that way who actually has been brought up within that realm. So I'm encouraged and excited to see that. And also, just to know that wave is happening, even with the naysayers who say, "IT doesn't matter. It's coming, right? Like for those folks, that's all automatically coming their way eventually here.

A

Aaron Bock 15:17

Yeah, it's happening more and more. And I mean, I think COVID kind of shed a light on organizations' IT departments and are they able to move swiftly or not? And I think it was an interesting last two years. So before we go on to sort of trends in IT and things that you guys are seeing, both personally and professionally at Anduin, if you could, I guess if you're coming in, and you're coaching, let's say that someone asked Tanner to come in and coach, the CEO, the CFO, the COO, but the people who you would traditionally not think as dealing with IT, you would come in and you're third party coaching them, what to think and make of IT and why to put importance on IT. Like how do you coach them and show that value in that? You know, you talked about earlier, organizations that do IT well invest in it over time and have a program for it? How do you coach those people? And then, maybe this question is sort of selfish for those listening that are probably in that position, trying to help sell IT inside the organization, like how do they sell IT better? To show that it is more helpful, and more than just your break-fixed? computer help or Geek Squad?

T

Tanner Fritz 16:27

Yeah, I think that's a really good question. I think that's a really good question. I think that's a really good question. I think that's a really good question. I think that's a really good question.

Yeah, no, I mean, I think everything comes back to making sure that your arguments are measurable, right? Like a business leader focuses on finances in ROI. And when I did this in my my past role at the healthcare firm, you know, there are certain pieces of our tech stack that don't make sense to change, like, "Hey, that thing is fine, right? We don't actually see a competitive advantage by changing it and spending the extra money." But that's pretty rare, unless we've already made some pretty big upgrades. And, you know, one of the things I would advise somebody to do is, "Hey, let's really build out an ecosystem and diagram here, like, what's our entire stack? How does it work? What integrates, what doesn't, where are our gaps at?" That's one of the first things I would do if I was brought into a new organization and coaching somebody is, let's just make sure we even know what exists, where the opportunities are, you know, what doesn't play nice with other things out there. There's so many tools, so many things you can enable. Yeah, that the connectivity and the integration opportunities out there are endless. The challenge is obviously with that are, well, what's the end goal here? And is the investment worth it? How are we gonna actually measure these projects and these investments? How do we keep ourselves honest on them? How do we keep track of the data across all these systems so that we can leverage the data in a way that's valuable. But fortunately, what's happening is, we're seeing all these trends where, you know, healthcare, the example there, where there are disparate systems, same thing now in a lot of the professional services world, and you've got kind of a hot trends, like, you know, the blockchain type stuff. Now even moving towards multi-chain, right? If you've read about that, where it's like, "Hey, web three, saying, 'Hey, instead of just having one blockchain here, and another here, another here, those are even too siloed. Like we need to be able to play off of one another. So I'm encouraged to see that, you know, the modern technologies, the trending technologies are going to continue to stay. There's a way to leverage by, you know, making sure there's connectivity within all of them. So, again, I think it all comes back to, "If I'm the business leader, and that's the, you know, the shoes I've put myself in as a coach, I want to make these decisions, knowing that there's gonna be a payback. And knowing that I really got to be judicious in my analysis, in my measurement of how I am going forward with the ROI. Because that's what I'm after here. I'm after increasing the health of the business." Part of that is really measurable. Then there's the other part that is more narrative, more intangible, which is, every organization, the whole goal of every organization, I'm convinced, is to enrich the lives of their customer in some way, right? Like, that's your goal. That's my goal. We all do it a little bit differently, but I can measure a lot of the tools I put in place to do that. Others can't quite measure them. As you know, black and white, I've really got to get more of the story behind it and understand this. This has got some emotional impact in the way I'm enriching my customers' life or some philosophical impact in the way I'm enriching their, whatever they're after. And that requires being really in touch with your customer. It's not just the, "Hey, we put Salesforce in place and it saved us time, we're able to pull the data faster." It's "We put Salesforce in place and it extends to our client, and the experience they have now is so much better than it was before because of that." And that might not be that measurable, you know, there's NPS and other things like that we can put in place. But those things that come to mind for me is, you know, trying to get a holistic view on technology. It's going to happen. But you got to view it as, "This is an investment and can be a competitive advantage if you scope it that way, right? If you approach it that way."

A

**Aaron Bock 20:16**

Right. I'm gonna ask you in a second about emerging trends. You brought up Web3. I think a lot of listeners might not even know what Web3 is yet. But you know, it's interesting. We will in a future episode, we're going to have someone who he started an NFT gaming platform. We'll

talk a little bit more about Web3. But yeah, it's interesting, what we see also is, you know, a lot of people approach, you know, I think IT and just the technology field in general is, you know, does it make me more efficient? And what's the cost savings, you know. I can reduce something I'm doing now for some tool or technology in the future. But I think it's so much more than that. And we interviewed and polled some of our customers. And when you ask them, like, how they engage with their customers. So whatever their business is, the way they engage with their customers first, within the first, you know, 10 seconds of speaking to a customer, there's an IT component involved, and it's all about that customer experience. How do you manage the customer lifecycle? What do you guys do to take payment from customers? How do you manage, like, how do you help make sure your customer has a good experience and all throughout that IT is involved? And so I think it's an important, it's much more important, and it's becoming more and more relevant as we move everything digitally and online. And I think it's, you know, I think people are just varying levels. So I appreciate the expertise, you bring. Maybe talk about trends. So you guys work a lot in the accounting vertical, you have customers in the professional services space. What are trends that you are seeing? What are trends that you're hearing on the news, or you're seeing inside of customers that are relevant? And then, what trends are there that, if people haven't heard of them, they need to start paying attention to in technology and IT?

T

Tanner Fritz 22:02

Yeah, you know, it's great question. I'm not necessarily in the bleeding edge of all things there, especially in the industry, and that we're actually a bit behind in the accounting industry, right, because accountants, specifically, are risk averse. But kind of the last to sign off on some of this. So the trends that we're seeing are some that I'd say a lot of swaths of industries out there see, which are all around how do I automate some things. Like what can I do with automation? And you know, that's all around for us. It's the tedious tasks, it's the manual things that are happening out there. And now what can I do from an AI perspective? Like, you know, we approach every product that we build at Anduin with two concepts. Like there's a job to be done, a client is trying to pay, right, or a firm is trying to follow up with a client to try and pay like, that's the job to be done. Well, how do we make it intelligent? I could go out and have somebody knock on doors to get payment, right? I can send snail mail, or I can send emails, which is great. But that's not even that helpful. Like, how do I analyze the time of day when I should be sending them? How do I follow up with the right sequence of emails towards the customer? How do I make sure that the experience they go through is seamless, and doesn't require a lot of authentication and minimum clicks? All that. We want to apply intelligence to everything we do. And you know, it seems simple, but those two concepts are the lens that we approach everything we build. So we're seeing a lot of that resonate in our space, I would say. Likewise, just thinking even, you know, personally, on things, some of my favorite tools, I know you were asking me earlier, like what else is out there that I'm excited about? And it aligns with those two concepts. Like anything that can help from an automation perspective and an intelligence perspective. So you know, those are what come to mind for me thinking about industry-wide, what else is out there trend-wise. You know, there's nothing that new under the sun. It's a reminder that, hey, we're all after working faster and smarter. But making sure that we do it right now, in this remote environment, is probably the biggest news that is out there. From a trend perspective, to your point COVID pushed us all, and, in particular, Anduin was started like a month and a half after COVID kicked off. So we were started as a remote-first team. Yeah, right, right. But what it did was it really forced us to say, "Hey, okay, we're gonna be remote-first. What does that mean?" Obviously, things like Zoom and web conferencing. But what does it mean really for us to adopt tools that help us with note taking,



with using email faster, with video messaging? And so some of the technologies that I would say for folks to check out if they haven't yet is, for me, like the game changers are Loom is a game changer for us. Loom is a short video screenshare. We use it internally. We use it with clients. It is so easy to create help articles, to demonstrate a specific process or workflow. So that's one thing that we've really leaned into his organization. Another one is, there's a handful of them out there, but there are the Zoom recording bots. I can't tell you how helpful that is in being able to get a video recording, but also an audio transcript. We go back and search through those all the time. Like, "Hey, we talked to somebody who wanted this feature function, I can't remember who it is, let's go search." Because it's going to take us three minutes and we have every conversation that we're able to record. We've got that note taking capability already done for us. Another one -

A

Aaron Bock 25:39

And on that, too - by the way, we'll put all of these technologies in the show notes, along with Anduin.AI so you guys can check it out. But, at Opkalla we do a lot with the conferencing and just the phone, telephone space, I guess. But we're seeing the transcription almost be table stakes at this point. Because it is so important for the customer experience. I mean, you think about what you guys do - software development. Hey, what feature they want call centers where people are calling in and saying, "Oh, man, we have an upset customer." "Oh, what did they ask for? What was the, you know, what was that thing they said?" So now going back and not only listening to recordings, which can take time and or cost a lot to store, but having a transcription is super easy to go through. So we're seeing that be almost table stakes.

T

Tanner Fritz 26:26

No, I love that. Yeah. And then the other two I was thinking about that come to mind. We all have less time, right, we have more meetings back to back to back. So a handful of our team members have really leaned into services that help free up your schedule. And there's one called Reclaim that our engineering team loves. Because it helps them get one-on-ones that, you know, don't have to be every week but can be ad hoc in a way that doesn't take a lot of time. That's one. And then the last one I'd say that's been a game changer for me personally is we use a specific email client called Superhuman, if you haven't checked that out. Gosh, it is phenomenal. From somebody who gets 200, 300 emails a day, it is so easy to fly through and be able to be much more efficient with email. And so that's been a game changer for me.

A

Aaron Bock 27:15

This is advice people pay for that you're giving for free. So we appreciate that. We'll put those in the show notes. Like I said, I've actually not heard of the last two. So I'm gonna check them out. I'm curious to know how they work. Going back to, another thing I want to go back to that you said that's really important is you said, "Well, you know, being in the accounting industry a lot we, you know, we're behind, we're typically behind." And I think that's where what we like to talk about on this show is how every industry is different. And it's okay, because what other industries are adopting rapidly, others won't see for five years. So we work a lot in the accounting space as well. We're hearing, like you said, RPA, automation, AI. I mean, I think for every industry, security is something that's coming up. Everyone wants to know how to be

more secure. But everyone's on different layers and different levels of security at this point. So it's just, it's really interesting that you said that we're behind. Well, I think if you look at each industry, there are people that are laggards and there are people that are always on the cutting edge. And so when I ask folks about this, when they say what's the trend, I get all different answers. And so, you know, the fact that you mentioned Web3 earlier, like that's a trend that some people are saying, "We need this in our business now. Accounting firms aren't probably considering how they play in the Metaverse yet, but maybe they do, so kind of wrapping up here in the next couple minutes. So you know, I think if you are talking to accounting firms, and they say, you know, "Hey, Tanner, hey, Anduin - in the next five years, what's a technology we don't use now that we need to consider using or need to pay attention to? Like, what is it?"

T

Tanner Fritz 28:55

Yeah, it's a great question. Yeah, if I had to pick one, I'd say the biggest opportunity they have is to lean into automation. They have so many rote tasks that are happening across different service lines that they're focused on, and we're seeing it is happening now. There are a lot of firms adopting this. The only other one I would say is really, really interesting is that accounting firms are services-based businesses. There's a lot of services-based businesses out there I know you guys work with, who are trying to get more predictable recurring revenue. They want to be SaaS software companies, right? And we all do. And so we're seeing a lot of companies and organizations say, "Hey, we want to lean in to be more product led. How do we generate products in a way where we can just recur payments?" And so we obviously have the ability to do the payment side, but helping them figure out how to get out of the Time and Billing side of things is a challenge and you're gonna see a lot of organizations figure out how to be much more product focused and less services focused, I think. That would be a major differentiator for firms.

A

Aaron Bock 30:03

You know, recurring revenue, SaaS, that's the model that everyone's going for. I think the joke is everything is "as a Service" Your life as a service. So, agreed, I think people are going for that. Maybe just so our listeners can get a better understanding - when you say automation, because obviously, you guys automate payments, but can you give a couple examples of what you mean by automation in the accounting industry? And where people should be considering automation?

T

Tanner Fritz 30:26

Yeah, absolutely. So there are things that are accounting industry specific, where you've got, you know, tax preparation work that's happening, and we're seeing that happen. And there's also audit projects and softwares that help with the actual auditing, and reviewing the actual audit details when an accounting firm is performing an audit. And so there's automation that can help along all those different services within the organization. And then there's more broader, I'd say, general purpose automation that could be for an accounting firm, could be for any other industry, where you're saying, "Yeah, this, we want to build RPA, to, you know, take this task and build it out. File needs to be moved every day from email to, you know, server folder," what have you. Things like that are being much more considered by firms that just in

the past didn't actually think about that. And, you know, the firms who are really differentiating themselves have somebody either as a resource, like you guys, or as a contractor, if they're big enough internal, where they say, "Hey, let's go ahead and make sure that we're just finding ways to really, again, like, turn this task into an automated process. And so we're seeing that across the board. And it's a lot of data movement, it's a lot of help connecting the dots and taking some of those, you know, tedious workflows out of people's hands, because they don't have the people to do it, right? They're struggling, right? And so that's what I would say, from an automation perspective. The intelligence that you can apply to those things then, really, is the next level. "Well, I've now got a lot of things automated, but how do I know when it fails? How do I know how to make it better? How do I know that there's a way to make it faster? What do I do with the data, the metadata around these processes?" That would be the next level up that we'd see.

A

Aaron Bock 32:17

And I guess, you know, so let's think about someone who's maybe entering, I would say, you're an IT professional, you've been all over IT, and you're now in more of a startup mode, and as a co-founder. For someone who's trying, because I think with RPA, and with automation, a lot of people feel like it's taking jobs. I think it is, in some cases, like you said, because there's the great resignation. But it's intended to make life easier. It's intended to make your job actually easier. So let's take someone who's starting in the IT profession or wants to get into it. What advice would you give them about getting into IT?

T

Tanner Fritz 32:52

Oh, yeah, absolutely. So, and I would say just one comment there, I don't really think it's necessarily taking jobs as much as it is augmenting, right? And freeing somebody up to really focus on critical thinking activities. And every organization wants people focused on that, right? Because those are where you're going to get the better ideas, you're going to be able to, you know, move the organization forward. We don't want people focused on, you know, these endless projects that could be automated. And then in terms of your question, somebody entering in, and you know, there's so many different ways to go, right? To your point, IT is so broad, where if you are focused on building, then there's obviously a software engineering side of the world and understanding how to actually build things, which is a phenomenal route if you're product oriented, right? And there's endless routes to go down in security because that is never going to go away. That's just gonna get deeper and deeper. And, you know, then there's like so many different flavors here. So my advice would be, you know, if you're getting into this, you're out of college, you're looking for a new role, I would really advise somebody to get out and get as much experience as possible, almost in little stints of internships, because you're gonna figure out what makes you tick and what you get most excited about. You know, they're supposed to adjust their learning, how to run one RPA tool, and that's a whole world, right? If you've got that skill set, you can be hired all over the place. One CRM tool, you can be a Salesforce certified admin. So there's so many different places you can go. My advice would be to get out to try these things. And also to meet with folks, right? Like people, especially in this town, in Charlotte, are, you know, they're happy to get coffee with you and tell you their entire experience. And I've been always incredibly overwhelmed with generosity of folks who will just get out and say, "Yeah, here's what I did. Here's my learnings. Here's somebody else who needs to talk to you." So I would encourage that, as somebody who's looking to get in.

A

Aaron Bock 34:53

Yeah, that's great advice. And I think it's interesting because there's a lot of debate I see on LinkedIn and other platform forms where, you know, if you're going into certain professions like IT, do you need to go to school, is it better to just come out of high school and start, you know, just doing the job and then work your way up? I think it just depends on your experience, what industry you're in. Like, for us, we see, you know, you're in banking, for example, you might be dealing with higher level folks who are all, you know, coming from college-educated backgrounds, and so they're not going to respect the IT people if they don't have an education, as opposed to manufacturing, where it really doesn't seem to matter at all. So, I appreciate your perspective. It's funny, you mentioned Salesforce, just a quick stat I heard the other day that I thought was interesting: to me, being in this industry, Salesforce is, you know, obviously the leader in CRM. I feel like everyone knows about them. But I read a stat the other day that only 70% of companies have a CRM implemented at this point in 2022, which is crazy to me. That means that 70% of companies are working either off a spreadsheet, or god knows what else. So that's how sometimes we're so innovative in some ways, and then you look at the data, and it's we're really not as a society that far down sometimes. So anyways, Tanner, I really appreciate you being on the show. In closing, I kinda want to ask you one last question. And this will be a question that we ask all of our guests. But, say you were getting to speak in front of a million people. So you're giving the Tanner State of the Union, kind of as it relates to IT. What do you want to leave people with? And what is the best advice you can give them about the way to, you know, either whether it's about approaching technology, about technology, thinking of technology, the best advice around technology that you would give?

T

Tanner Fritz 36:42

That's really interesting. You know -

A

Aaron Bock 36:44

Broad questions, so do what you want with them.

T

Tanner Fritz 36:46

From a professional perspective, I think, you know, again, going back, I'm big believer in "Let's measure what we're using, and why it's effective, and how to get the most out of it." From a personal perspective, I think the one thing I would leave is, our days are just flooded everywhere with technology and figuring out how to turn off and how to create space for yourself. It's a challenge for all of us, but it is so important. It is something I've been challenged recently to improve, and there's technology to help you do that, it turns out, right? So figuring out what that means for you, you know, I've got friends who take a technology Sabbath once a week. I've got friends who use technology to do meditation prayer every morning, right? Like, figuring out how you can create that space for yourself is actually so important for you personally, it's important for you professionally, because you've got the mental space to be able to do the critical thinking, do the self care, so that would be the one thing I believe

A Aaron Bock 37:49

That's a great platform to leave on. Tanner, thank you for joining the IT Matters podcast today. Hope everyone has a wonderful day and we'll catch you guys on the next episode.

T Tanner Fritz 37:59

Thanks. Take care.

A Aaron Bock 38:00

Thanks.

N Narrator 38:03

Thanks for listening. The IT Matters podcast is produced by Opkalla, an IT advisory firm that helps businesses navigate the vast and complex IT marketplace. Learn more about Opkalla at [opkalla.com](https://opkalla.com).