Episode: 82
Frank Di Lorenzo and Adam Crigger

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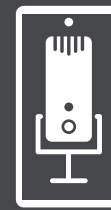WORKFORCE**
PODCAST

Mike Merrill:
Hello, and welcome to the Mobile Workforce Podcast. I'm your host, Mike Merrill. And today we are sitting down with Adam Crigger and Frank Di Lorenzo with Preferred Strategies Inc. And we're here live at the CFMA conference in Atlanta, Georgia. And so that's what brings us together today. Thought this would be a great opportunity to have another episode recorded. So we met with Frank previously a couple times and had some good discussions, wanted to stack on top of that and bring Adam in to the conversation. So thanks for joining us, gentlemen,

Frank Di Lorenzo:
Mike, it's great to be here and it's great to be live at the CFMA conference after a hiatus of two years.

Mike Merrill:
Yeah, too long and pleasure to meet you in person, finally Adam.

Adam Crigger:
Yeah, this is a first time doing a live event for since 2019. So super thrilled to be here and then be here for you guys today.

Mike Merrill:
Yeah. Thank you. So today we were talking a little bit before and we've had continual conversations all around data, so that's kind of your guys' wheelhouse. So what can you tell us about what's going on with data today and what kind of interesting insights can you share with the audience?

Frank Di Lorenzo:
That's a great question, Mike, and as you know, we live in a real narrow focused band and it is data and business intelligence and helping companies improve

by leveraging their data effectively. And one thing that hit me, right when I walked onto the exhibit floor is all the vendors out there now suddenly have added these bullets that say data analytics, analytics, business intelligence.

Mike Merrill:
Sure.

Frank Di Lorenzo:
And it's exciting to see, and it's something that, and certainly Adam can speak to. This has been living in that for 20 years, but I see the reason, I think we're seeing that, you think about this for a minute, you see all these different point solutions that contractors are implementing.

Mike Merrill:
Yeah.

Frank Di Lorenzo:
Right. So they have data living in their ERP, data living in their project management, internet of things, data on the web, data in disparate clouds. How do you get your arms around it? And I was excited to join Preferred Strategies because I think Adam and the team do a fantastic job of managing just that. So what would you add to that?

Adam Crigger:
Yeah, I mean, I think for now several years, and even now CIOs is still a top priority is how to get their hands around their data. And it's kind of a little bit cliche, but still, it's people making decisions and you want them to do it with confidence. And, so that's the goal, is to have their systems lead to better decision making in their business. And that's why I think everybody's kind of, and the technologies have now moved to a whole

new wave of innovation around analytics and we'll talk more about that.

Frank Di Lorenzo:
Enter Power BI, right.

Adam Crigger:
That's right.

Frank Di Lorenzo:
Enter Power BI. So, if you look at, if I say a spreadsheet, Mike, what tool do you think of?

Mike Merrill:
Excel. Microsoft.

Frank Di Lorenzo:
If I want to write you a letter. What tool are you going to use?

Mike Merrill:
Microsoft Word.

Frank Di Lorenzo:
And so when you talk data visualization, which is dash boarding and that sort of thing. Yeah. What do you think of?

Adam Crigger:
Power BI.

Frank Di Lorenzo:
Power BI. So I think that's one of the exciting things is, now there's a tool out there that is easy enough if you implement it properly and there's no easy button, but if you take the right approach and implement it properly, is finally a very usable tool that allows you to take your data wherever you go and visualize it. So I like to call it the four Ds. You've got your data, data generally generates a conversation, so your

dialogue and then behind the data is typically a lot of documents, right? Your invoices purchase orders-

Mike Merrill:
Paper.

Frank Di Lorenzo:
Yep. Yeah. Still, maybe electronic, but you're right. Still paper, those three Ds. If you have that at your fingertips, you can make actionable decisions. So.

Mike Merrill:
I like that.

Frank Di Lorenzo:
Yeah.

Mike Merrill:
Well more accurate, more timely data equals better decisions. Right?

Frank Di Lorenzo:
Absolutely. And nowadays you should be able to take it with you wherever you go.

Mike Merrill:
Yeah. Yeah. I love that. So I heard the term about 20 years. Is that how long Preferred Strategies have been going?

Adam Crigger:
Yeah. February 2022, 20 year, two decades.

Mike Merrill:
Wow.

Adam Crigger:
20 year anniversary.

Mike Merrill:
Congratulations. That's pretty cool. Actually.

Adam Crigger:
Yeah.

Mike Merrill:
That's a long time to be in data. So data was a BI or you probably called it something different back then, but that was on your booth in the beginning. Right?

Adam Crigger:
Yeah. So, I used to work in the mid to late nineties for another construction customer and the finance department dealing with their ERP implementation and then got thrown into reporting because it's like everybody at that time, ERP was the big hot thing and people could get data in, couldn't get it out. And where I was at, we figured out with, if we used crystal reports back then-

Mike Merrill:
Okay.

Adam Crigger:
For that term and that company. And by the time I left there, we probably had three to 500 reports in Crystal.

Mike Merrill:
Wow.

Adam Crigger:
On top of the JD Edwards ERP in the construction space. And, so we talked to other companies all struggling with the same pain.

Mike Merrill:
Okay.

Adam Crigger:
Left there to start Preferred Strategies in 2002. And here we are, two decades later, but back then, yeah, it was reporting. And because of our technologies, it was Crystal got acquired by another company called Business Objects. Business Objects got acquired by SAP. JD Edwards got acquired by PeopleSoft and then Oracle. And so we were just, every other year was a new, you know

Mike Merrill:
New logo on the T-shirt.

Adam Crigger:
But from the BI and analytics, Crystal was really a kind of a traditional reporting and then business intelligence applications and Power BI is a modern way of thinking with visualization and the advanced analytics. So it's fun to see the change, customers don't want to go back to the way it was 20 years ago.

Mike Merrill:
Oh yeah. Yeah. So that's a tool that you use most commonly to aggregate and get this information and give data what they need.

Adam Crigger:
The Power BI.

Mike Merrill:
Yeah.

Adam Crigger:
Yeah. So we were supporting a variety of these technologies for the last 20 years. We transitions, Power BIs come on the scene around 2015.

Mike Merrill:
Okay.

Adam Crigger:
And they had another plug into Excel prior to that called Power Pivot. And it was just a backend. So people could pull in millions of rows of data, into an engine within their spreadsheet and build all these cool pivot tables, which everybody liked to do in Excel. And so we started dabbling with that and that's the technology that basically became the engine of Power BI. So we had about a four year jump start.

Mike Merrill:
Wow.

Adam Crigger:
Because we just, by circumstance, we didn't know Power BI was coming four years later, but next thing you know, so since 2016 it's been pretty much all Power BI for us and-

Mike Merrill:
Wow.

Adam Crigger:
Super, super exciting.

Frank Di Lorenzo:
Now I was just going to say, if you're familiar with the Gartner magic quadrant, if you look at that now.

Mike Merrill:
Yeah.

Frank Di Lorenzo:
Yep. You'll see. Microsoft's in that top leadership position, started right around 2016, I think. But every year when I look at that updated report that gap's just getting a little wider-

Mike Merrill:
Interesting.

Frank Di Lorenzo:
Microsoft, makes their push into that, so.

Adam Crigger:
Yeah. It's a fourth year in a row where Microsoft is further on the scale of completeness of vision and up on ability to execute. So they're kind of in pull position. Yeah. Fourth year straight.

Mike Merrill:
That's interesting. So you mentioned, getting to the trade show floor and seeing these buzzwords that are, they've shifted from one thing to another, to another now there's... You mentioned ERP earlier and now it's BI.

Frank Di Lorenzo:
Right.

Mike Merrill:
And data, for a while it was mobile.

Frank Di Lorenzo:
Right.

Mike Merrill:
That was a... Mobile was a big thing. ERP systems had to have that checkbox. We do mobile. We have mobile.

Frank Di Lorenzo:
Had to be in the cloud.

Mike Merrill:
Yeah. Now the cloud is, and most everything's kind of moving that way. I don't know that we need to sell the industry on the value of the cloud still. I mean, the ROI is still disputable by a lot that of companies that want to argue that point, they want to hold onto their servers for whatever reason. So, I think there's always going to be some lagger there, but what, when you go to the trade show floor now, number one, other than the BI and the buzzword stuff, what else is surprising?

And then maybe also it's been a couple years since we've been back together, what's not surprising? What do you feel like is...

Frank Di Lorenzo:
Yeah, it's a good question. Now what's exciting. So maybe surprising, but also in a good way is, as I said earlier, I think construction, I think we'd all agree has been behind when it comes to a technology adoption and probably for a variety of reasons, tighter profit margins, more challenging labor force. People are really starting to leverage tools like AboutTime WorkMax for time collection.

Mike Merrill:
Sure.

Frank Di Lorenzo:
Project management solutions, things of that nature. So now, but what's the fallout from that, so they're getting data more efficiently, processing data more efficiently from all these different systems. And I'm talking to them all down on the floor. It even presents a bigger challenge and how to combine it all from a data perspective.

Mike Merrill:
Ah.

Frank Di Lorenzo:
Yeah.

Mike Merrill:
Yeah.

Adam Crigger:
It's funny, just to add a little bit back to the comment about the cloud as well. For a lot of customers that we work with, it's always kind of on their future radar. So we're still running the ERP on-premise, but because of the way Microsoft is built into the Azure landscape and the services runs in that tenant space. So we're moving them, as for a lot of customers, we're kind of their first

project taking their data to the cloud. Don't take the whole year peeps per se, but they're taking their data and then it's just going to kind of expand from there. So even though again, cloud has been a buzzword for a long time, it's now it's great to see that transition happening.

Mike Merrill:
Yeah. It's happening.

Adam Crigger:
Yeah.

Frank Di Lorenzo:
And so Adam, for the folks that may not be as techy or technically inclined, how would you describe Azure? What is Azure?

Adam Crigger:
Yeah. So I think for a long time, AWS kind of, you could run servers. So there's kind of whether or not it's the infrastructure as a platform or software as a service kind of... But the Azure is now really picking up speed as far as the market share of cloud. And, so some customers, they might want to run their servers or just their databases, or even in that same space, the Power BI kind of runs those models. So get into, little techy I guess, Power BI, when you build a power BI report and you publish it to the cloud, it publishes with the data set.

Mike Merrill:
Okay.

Adam Crigger:
And so that data set now runs in memory in the cloud and that becomes the source of information. And you can feed that data set as, Frank was talking about, with your ERP data-

Mike Merrill:
Okay.

Adam Crigger:
Estimating data, your CRM, it's really going to be this agnostic, but it's taking what used to be 20 years ago at the data level with these data warehouses.

Mike Merrill:
Okay.

Adam Crigger:
Into the cloud and memory. And so it's really exciting, but there's so many options. Once you start going down that route, in the fashion and format you want to put that data in the cloud. That's what, then you can then add to that with all the advanced analytics machine learning. And Microsoft's kind of leading that charge, but Azure is really just, Microsoft's overarching kind of umbrella of all these different cloud services and options.

Mike Merrill:
So would an ERP solution be the primary thing that you're feeding this with and then also what other types of systems are pretty common to be in that ecosystem?

Adam Crigger:
Yeah. So from our standpoint, what we deliver, if our company is, so it's called Quick Launch and Quick Launch, we spent those two decades and-

Mike Merrill:
Yeah. Learning.

Adam Crigger:
With a lot of domain knowledge that we've had with our 25 team members over the years.

Mike Merrill:
Okay.

Adam Crigger:
Thousands and thousands of hours to kind of figure out what doesn't work well.

Mike Merrill:
Okay.

Adam Crigger:
And how these technologies as they change, what works really well. So with Quick Launch, we support kind of four applications a day and growing, but we have delivered packaged these in-memory data sets for JD Edwards, for Viewpoint Vista, Netsuite. So those are the kind of three currently on the ERP side and then also Salesforce. So it's kind of a... And the nice thing is that these are kind of supported individually, but also customers that might be running Vista at Salesforce or JD Edwards and Salesforce, want to say, okay, we need to blend this data together and we can help them with that, because that's...

Frank Di Lorenzo:
May I had a comment to that because I think this is great. How our growth internally specific to Preferred Strategies for a moment has been organic. So we had two large contractors on JD Edwards.

Mike Merrill:
Okay.

Frank Di Lorenzo:
They migrated to Viewpoint Vista.

Mike Merrill:
Okay.

Frank Di Lorenzo:
Now it's interesting to me, they were willing to give up and replace the ERP, which is no easy task.

Mike Merrill:
Yeah.

Frank Di Lorenzo:
They did not want to give up their data analytics though.

Mike Merrill:
Interesting.

Frank Di Lorenzo:
So they called Adam and said, "would you please write a model for Viewpoint?" That's how Viewpoint basically was born. And then similar with Netsuite, we had a client on JD Edwards, went to a company that had Netsuite, missed having the dashboards and analytics, called Adam. And Adam's a nice guy. He will do it for you, but I always like it when the growth starts with the customer need and we solve for it. That's the point.

Mike Merrill:
Yeah. That's the best way.

Frank Di Lorenzo:
Yeah.

Mike Merrill:
It's usually done in the best format and the best approach that somebody would want it because they want it and need it. They're using it to operate. So it's probably the better approach than what we can dream up, right?

Frank Di Lorenzo:
Yeah. I absolutely agree. And it's been exciting to see that.

Adam Crigger:
And even from the CRM perspective with Salesforce, when we've been using Salesforce internally at Preferred Strategies for 10 or 12 years.

Frank Di Lorenzo:
Oh, okay.

Adam Crigger:
We've been using Power BI on top of our own Salesforce for years.

Mike Merrill:
Eating your own dog food.

Adam Crigger:
Yeah. Basically. And then we start have customers asking for it.

Mike Merrill:
Yeah.

Adam Crigger:
And asking for it to integrate with their ERP and we're like, oh my gosh. Well, we-

Mike Merrill:
We got that nailed.

Adam Crigger:
We got, this is like bread and butter.

Frank Di Lorenzo:
Yep. But on the flip side, working for a company that does data, you can't hide. You made six calls. It took 12 minutes and no, I'm just kidding. The data's there, data doesn't lie.

Mike Merrill:
Right. No, I love that. Yeah. On the last episode I came up with a... Basically data doesn't care, data doesn't have politics. It doesn't have an opinion. It just is.

Frank Di Lorenzo:
It just is.

Mike Merrill:
So.

Adam Crigger:
That's a great point. And, this was probably, I don't know, three or four years ago at a conference, we

were doing advanced analytics machine learning presentation. And in preparation, we contracted to a high end kind of real consultant in the field that, we had him work with us on, Onit. And he made a great comment that I still remember to this day. He said, "You have to look at it because the data's going to tell you something and it's going to say and predict, this is what you can expect, but it's just another voice in the room." So if you think about it, you've got a room of executives and you've got-

Frank Di Lorenzo:
That is good comment.

Adam Crigger:
Everybody with their mind of their view, because there's always different variables and factors that go into any analysis and let the data, what's the data telling us. And now what's each everybody else around the table telling us, and then let's make a decision, so.

Mike Merrill:
Interesting.

Frank Di Lorenzo:
And one thing I would say, and you know this better than I. So feel free certainly to correct me, but it's a very important thing, getting your arms around the data, but it's new for a lot of companies. So there was a stat, I think it was 80 or 87% of people that try and do this. Initially, that project fails ultimately.

Mike Merrill:
Wow, that's a big number.

Frank Di Lorenzo:
And we were just pulling, because data doesn't lie. Like you just said. And our success rate with clients again, not to be bragging already. They just, because this is what Preferred Strategies has done. I think where we're hanging right around at 97%.

Mike Merrill:
Wow.

Frank Di Lorenzo:
Yes.

Mike Merrill:
Wow.

Frank Di Lorenzo:
Is that accurate? Did I state that? Yeah.

Adam Crigger:
Yeah. No. And it's been several studies over 80% failure rate.

Frank Di Lorenzo:
Yeah.

Adam Crigger:
And I think the correlation we want to put together is, you implement a solution like Power BI and let's say even Quick Launch for that matter to really have your data help you with your bigger goal, which is to strengthen your data culture of your organization and becoming data driven. Right? That's another kind of key, I guess overly used kind of term out there being data driven, being data driven. But we shared this in our presentation, yesterday at the conference, the McKinsey Global Institute did a study and they found that companies with a very strong data culture are 23 times more successful at acquiring new customers.

Mike Merrill:
Okay.

Adam Crigger:
Six times more likely to retain customers and 19 times more likely to be profitable. So it's impressive that if you can achieve that, truly having a really strong data culture. I mean, sky's the limit. Really is.

Frank Di Lorenzo:
We talked about mobile, cloud, now data, what's going to be next. I feel like we're going to have such AI. You're going to walk down the show floor and the vet is going to go, okay, they're not going to buy, 82% chance they're going to purchase. I just don't know where it's going to go.

Mike Merrill:
It's going to be on their forehead. So, I'm not talking this... Oh, there's the guy.

Frank Di Lorenzo:
Yeah. I mean, what happens if you Google new shoes once. Everywhere I go, my watch and my phone.

Mike Merrill:
Oh, I know.

Frank Di Lorenzo:
So I think that's where we're headed next, which is exciting. And maybe a touch.

Mike Merrill:
Yeah. Right.

Frank Di Lorenzo:
Yeah. Unnerving.

Mike Merrill:
Well, AI, I mean, it's trying to save us time, right?

Frank Di Lorenzo:
Yeah.

Mike Merrill:
That's the the goal. It's trying to make it more accurate. It's trying to preempt and gas with education. Right. Informed, guessing.

Frank Di Lorenzo:
Yeah.

Mike Merrill:
What we would choose. And I think, even without AI, we've got to take a step back. And I mean, we said data doesn't lie, but good data doesn't lie. Right?

Frank Di Lorenzo:
Yeah.

Adam Crigger:
Yeah.

Mike Merrill:
Plenty of data lies because it wasn't collected accurately.

Frank Di Lorenzo:
Right.

Mike Merrill:
Wasn't gathered properly. It wasn't gathered timely, wasn't shared appropriately. I mean, there's all these different caveats, I think. So that's maybe something important to discuss, how do we make sure we're getting accurate data and the right kind of data? I mean, are there some baselines or benchmarks or things that companies should use as a rule of thumb?

Adam Crigger:
That's a great question. And again, in our presentation yesterday, and he's not here-

Mike Merrill:
And I wasn't there. So I'm just... This is me naturally asking.

Frank Di Lorenzo:
That's why I turned right to him. I knew he'd be-

Mike Merrill:
Sure.

Adam Crigger:
And Ben Harrison, I think shared the comment, but it's always a challenge about data and some companies say, look, we're not ready for analytics or better BI because our data's bad. We got to clean our data to be able to do that.

Mike Merrill:
Okay. Okay.

Adam Crigger:
And here's the challenge is, well, how do you know what you need to clean? If you've had this bad data or this inaccurate data for 10 years and you haven't done anything about it. What's... You think you're going to do it and even know? So I think what a tool like data visualization and Power BI, it brings it right to the forefront. You drag something into a chart and you're going to see, okay, how do we have $6 million of revenue to a blank category code? What's that?

Mike Merrill:
Wow. Oh my goodness.

Adam Crigger:
No, we didn't fill it in. And so I think Ben talked about, it's so important to let the... You need to start implementing something like this to have a reason to fix it.

Mike Merrill:
Okay.

Adam Crigger:
And have it shown because we... I would say-

Mike Merrill:
So you're saying the other approach, let's not wait around until the data's perfect because you're making

new data every day. You've got to start somewhere. How about now?

Adam Crigger:
That's right. Yeah. And it'll force you to act once you have that visibility.

Mike Merrill:
Okay.

Adam Crigger:
And then, or maybe this, you only do business in North America and you look at a geographic chart and all of a sudden it's showing, you're doing business in Sydney, Australia. So wait, how's that? We don't have to... Oh, well, because we miskeyed some of the geographic location in their address book. Right? So it's like, those are... You find those outliers and you fix them, it forces you to change a business process by seeing the data.

Mike Merrill:
It's funny. Yeah. As you're saying this and I don't know why this quote popped in my head, but it's a Mike Tyson quote and everybody has a plan until you get punched in the face. So let the data punch you in the face.

Adam Crigger:
100%

Frank Di Lorenzo:
That's a great analogy.

Mike Merrill:
It's kind of what you're saying. I mean, that's what I'm hearing.

Adam Crigger:
A hundred percent.

Mike Merrill:
And I agree.

Frank Di Lorenzo:
And you know with the-

Mike Merrill:
Why are you hiding from us?

Frank Di Lorenzo:
With the visualization, there was a customer. Can I say the name? Is it okay. Regional controller, Justin Adams, Granite Construction.

Mike Merrill:
What's their cell number? I'm just kidding.

Frank Di Lorenzo:
That was great.

Mike Merrill:
I'm just kidding.

Frank Di Lorenzo:
But-

Mike Merrill:
There's still prospect.

Frank Di Lorenzo:
He said something that really resonated with me. And I didn't think about it, but it sums up what we're saying with visualization of data. He said, "My equipment manager is not going to look at a tabular report, rows and columns of numbers.It's remember that to see the same thing that he does when he sees a gauge, green, yellow, red, he remembers that gauge. We're in the red. I got to do something." So when you visualize data, you see things you didn't know were right in front of you before. So, and that's a real world example. And I love the other thing he said. He said something about being

the trained caboose. I don't know what it was, but he said, I'm not good with equipment. I'm a controller. But now with all these visualization dashboards, we have our controllers, our equipment managers become a mini controller and I've become the caboose of the train, but getting better with equipment or something, the way he said it was much better. I'm not doing him justice, but.

Mike Merrill:
Okay.

Frank Di Lorenzo:
But the point makes sense. Right?

Mike Merrill:
Yeah.

Frank Di Lorenzo:
Now that they're both looking at the same thing, they can consume it in a nice view, where, what is it? 60 something percent of people are visual. They see the trends much more quickly in a visual environment. It makes the equipment manager act more like a controller and he can understand the equipment numbers much better.

Mike Merrill:
Right. Well, the math, it makes sense to him. Just maybe the yellow iron behind it, isn't so familiar.

Frank Di Lorenzo:
Yeah.

Mike Merrill:
But it… Data ISIS. I don't know you'd say that, but it basically turns that yellow iron into data.

Frank Di Lorenzo:
I like the new word, Data ISIS.

Mike Merrill:
So.

Frank Di Lorenzo:
That's good.

Adam Crigger:
Yeah. And even I think that same example, like he was sharing that, on these visuals, there's a target. Right. They know what their annual plan is.

Frank Di Lorenzo:
Yeah.

Adam Crigger:
It breaks it down to months and weeks. And so, he's every day, eyeball, okay, I got to get above this line and everything's golden. So once he-

Mike Merrill:
He's keeping scores. He's going.

Adam Crigger:
Exactly. And he needs to know, once he hits that, oh my gosh, we just hit it this morning. You know

Mike Merrill:
That's another thing. And you guys can use the... I mean, I think you'll like the analogy, maybe you use something similar, but we use the analogy of like a shot clock or the scoreboard in a basketball game. And it's like, we don't hide the scoreboard during the whole game and show it to them last 30 seconds. Right? It's too late.

Frank Di Lorenzo:
Right.

Adam Crigger:
That's right.

Mike Merrill:
It's too late to do, whoever's winning's going to win. Right? So can we-

Frank Di Lorenzo:
That's true.

Mike Merrill:
Share the scoreboard with everybody on the court throughout the game?

Frank Di Lorenzo:
Yeah. I'm not saying I'm a Celtics fan, but it didn't help the Bucks

Mike Merrill:
No. Right. But anyway, but that's back to those dashes, the gauges, the things that we can visualize that make sense to-

Frank Di Lorenzo:
Info at a glance.

Mike Merrill:
Right.

Frank Di Lorenzo:
Right. So.

Adam Crigger:
Yeah, I think the one thing on top of that is, people talk about dashboards and some companies, they just heard the buzzword, we need dashboards, we need dashboards. It's like, okay, well, why? What's it going to do, how's it going to change your business? And I think the visual nature of it giving you that instant idea of what the actual performance is compared to something, whether that's a target or a prior year, but it can't end there. It's only valuable if it can help you get to the answer to the question.

Mike Merrill:
There you go.

Adam Crigger:
So it says, oh, it's red or it's sent me an alert. I've got a problem. What is it? So then it needs to be interactive and drillable. And so when we build with our Quick Launch model around the ERP and CRM stuff we've talked about, we basically bring the data into that model at the most detailed grain.

So when you're seeing these dashboards at the highest level, you can click through any of those, all through the layers and the users could even open it up and edit and change the way everything navigates, but they get down to the answer. Right? And they know, because when it comes through one centralized data set that everybody has validated and they know it's matching these source systems, like their ERP, like the CRM, they know that if I'm grabbing a metric backlog or gross profit from that it's accurate. There's no question, whether I'm doing that in a spreadsheet or I'm doing that in Power BI, I'm doing that.

Frank Di Lorenzo:
Yeah.

Adam Crigger:
It's, people know, that's how you really lift the confidence. And I think that's key

.Frank Di Lorenzo:

And the other thing is performance. You ever talk to somebody when they say I hit the report, went and made a sandwich, talked to my kids, laid back, and it's 70%.

Mike Merrill:
It's almost there.

Frank Di Lorenzo:
It's almost there. Performance on the report generation and performance on the dragon, on the

production system. Don't run those reports. We're about to process payroll, that kind of thing.

Mike Merrill:
Oh, okay.

Frank Di Lorenzo:
And Adam does a really good job of this. I think maybe just speak briefly to best practices so that you have optimized performance and what I like to call kind of near real time data.

Adam Crigger:
Yeah. So there's lots of different ways to approach this. And so, some of our customers are 20, 50 million in revenue and have very small volumes of data and some are 150 billion. And have, you know certain amounts. So depending upon your size of an organization, you can feed directly from your source. And you'll load in directly into the Power BI very quickly. And there's ways to kind of connect from on-premise to that model, or we also can replicate. And a lot of times, if it's a larger volumes, we need to move that data closer to those in memory data, that's in the cloud.

Mike Merrill:
Okay.

Adam Crigger:
So that's where we do a lot of replication. So that's just near real time updating in the cloud. And then you never want to load. If you've got 300 million records in a table, you don't want to load every hour, 300 million records.

Mike Merrill:
Right.

Frank Di Lorenzo:
Right.

Adam Crigger:
So you need to partition the data. You need to strategically set it up and make sure it's properly techy.

Mike Merrill:
Are there settings that can flag just changed data or updated or is it-

Adam Crigger:
It's not that easy, but if you have the right techniques and methodology.

Mike Merrill:
Okay.

Frank Di Lorenzo:
That's the secret sauce.

Adam Crigger:
And that's what we basically put together is, that's what we're delivering. So for smaller customers, it doesn't make a difference if it runs four minutes, versus six minutes.

Mike Merrill:
They don't have enough data for it to be a problem.

Adam Crigger:
But Elvis said, if it could take-

Mike Merrill:
I would think.

Adam Crigger:
Two hours down to 12 minutes, or 45 minutes down to 13 minutes, that's a difference. Right. So.

Mike Merrill:
Perfect.

Frank Di Lorenzo:
And in construction speak, I'd put it this way. If you look at job costs, job history changes, maybe almost never. So you could refresh that say once a day, but the transactional stuff's happening all the time. Maybe you want to refresh that every 30 minutes.

Mike Merrill:
Okay.

Frank Di Lorenzo:
You know what I mean? So that's where you can optimize things to leverage the technology, to increase that performance.

Mike Merrill:
Yeah. With our system, we're integrated with an ERP. It's the same thing we can set up this timer and if new data's put in the ERP we can pull it down every so often. And it wouldn't make sense to do it every minute. Right. Because it's just not, it doesn't matter. Right. Then it's near real time. Right?

Frank Di Lorenzo:
Yeah. Exactly.

And some of that's, even in some of these ERPs, while you're pulling those as well. And, some of the ERPs we work with those timestamps aren't always updated based on the other stuff you are feeding in. And so that's always, sometimes becomes a challenge is, if they're not, then you got to work around that. So, we've kind of gotten creative on when they're not updated. How do we handle that?

Mike Merrill:
Right. Okay. Well, so what I guess in the industry, we talked about the trade show floor and what surprised you and what didn't, what is pleasantly surprising about where things are at now, and then what makes you want to pull your hair out that you're still running into all the time think, are we still talking about this?

Adam Crigger:
Yeah. I mean, I just think it's, because what we're talking about with this Power BI and data visualization, and still the masses are still living in spreadsheets.

Mike Merrill:
Okay.

Adam Crigger:
It's really a leap for them to kind of understand what could this grass greener be like.

Mike Merrill:
Right.

Frank Di Lorenzo:
Yeah.

Adam Crigger:
Right. And so it's getting that message across. And sometimes it's a leap of faith. Hey, which is nice when 80% fail and we've got 90% retaining over that and customers and... So anyway, you-

Frank Di Lorenzo:
No, no, go ahead. I was just going to add to that. Because you said Excel triggered that thought. In a leap of faith, sometimes it's an intermediary step. So a lot of financial folks, especially they love their Excel. They're not going to give it up right away. So when we implement, for example, the data model that we've been discussing, it is equally valuable on Excel as it is Power BI.

Mike Merrill:
Okay.

Frank Di Lorenzo:
And that way, if I pull a report into a dashboard but operation's more likely there, but me, CFO, I like my spreadsheet. If I grab a measure cost to complete, it's the same source. So whether I'm looking at it Excel or

Power BI because Excel's a great tool. I mean, it is. It's just when you have it as a silo of data within itself, not so great. Right. I have this PowerPoint slide I actually got from a customer, all hail the magic wizard of spreadsheets. How do we know the data's right? I don't know, but it's pretty. And so for some clients, say to help them along the way, we implement Quick Launch, use it with Excel.

Mike Merrill:
Okay.

Frank Di Lorenzo:
Hey, what do you think about this gauge? Or what do you think about this waterfall chart? And then they start to mature in their own journey to something visually, Power Bi.

Mike Merrill:
Okay.

Adam Crigger:
I think that's a great point. Frank you made about the Excel and the importance of that because what's happening today, even one of the poll questions in our presentation-

Frank Di Lorenzo:
Yes.

Adam Crigger:
Was, there's still, I can't remember the exact percentage, but a high percent of people running reports from the ERP or other places and exporting to Excel.

Mike Merrill:
Okay.

Adam Crigger:
But once you've export to Excel, you've got a one time manual copy within all the logic.

Mike Merrill:
It's a dead copy.

Adam Crigger:
Right. I think I was doing research before the presentation that I think they say that 88% of spreadsheets have at least 1% or more errors within the calculation of formulas. Right. So if you take 88% of spreadsheets out there flawed. So that's what happens when you export and then build and Excel pivot tables and all of that and Lookups. But when you look at something like Excel, as a connection, back to the model and do pivot tables, there is no middle step.

Mike Merrill:
Right.

Adam Crigger:
And that's how you get the confidence as well. And I do agree. It's a great way for people to get comfortable with that and then the visualization added onto that is just a much smaller step-

Mike Merrill:
Icing on the cake.

Adam Crigger:
Than like, oh my gosh, I got to drop everything we're doing and do this whole new thing.

Frank Di Lorenzo:
And the other thing, you load it on a spreadsheet. What happens? It's huge. 50 megabytes spreadsheet. If, you use the spreadsheet, is what it's optimized of, what it's good for. What if scenario tool, when you're pulling, say from a data model like Quick Launch in this case, the spreadsheets kilobytes, it's not bringing data into, it's bringing the results, so.

Adam Crigger:
Even Justin in his presentation yesterday. Oh, we open these spreadsheets and the lights dim. Right. You know what I'm saying?

Frank Di Lorenzo:
He is so funny.

Mike Merrill:
Take a lot of horsepower to... That's pretty funny.

Frank Di Lorenzo:
Accounting human.

Mike Merrill:
Haven't heard that.

Frank Di Lorenzo:
He just cracked me like, he had one I'm using this forever. He goes, anytime I hear EBIDA I want to buy a vowel.

Adam Crigger:
Yeah. That's so funny.

Frank Di Lorenzo:
That's his, I can't take credit.

Mike Merrill:
That's pretty funny. That's funny. Well, yeah. Lots going on with the world of data and the industry. I think people are starting to catch the vision. I mean, companies like yourselves are out there preaching the good word of what tools are out there and what can be leveraged better that, companies just haven't been historically that good at. What would you say to the contractor that knows they've got either too much data and they don't know how to sort it out or not enough data. What's their next step to getting to a better place where you guys can get in and help them?

Frank Di Lorenzo:
That's a good question. And I think, we have a very... We, Preferred Strategy, is a very specific solution for the systems we mentioned. That's CGD-

Mike Merrill:
Yeah. That makes sense.

Frank Di Lorenzo:
But find somebody like us or somebody that can consult on a Power BI or data process. And you know, the one thing I like with our team, I'll just throw it out there. We've got 27, really friendly, good people. I can guarantee you if you're on another solution and you called us for some direction, we're not going to turn your way. We may not have a solution. But we'll have some good advice.

Mike Merrill:
You'll point them somewhere.

Frank Di Lorenzo:
Yeah absolutely.

Mike Merrill:
And get some help.

Frank Di Lorenzo:
And one thing I love is, the other thing is, you got to get the data. You remember the days, well, they still exist when people did time and manual or even spreadsheets.

Mike Merrill:
Yep.

Frank Di Lorenzo:
You're collecting the field information not just time. Right?

Mike Merrill:
Right.

Frank Di Lorenzo:
So more effectively, more timely. So that's the input of the funnel of the data part.

Mike Merrill:
Right.

Frank Di Lorenzo:
So you get that solved and I'm excited because we're seeing more companies do that.

Mike Merrill:
Yeah.

Frank Di Lorenzo:
So now let's leverage it and that is all we do. And I'm sure we can point you in the right direction., If we don't have a solution out of the box for you.

Mike Merrill:
Okay.

Frank Di Lorenzo:
We're the nice guys. I like to say.

Mike Merrill:
There you go.

Adam Crigger:
Yeah. I agree. I think that's, we've learned, as I mentioned after 20 years, what works and what doesn't work and we're all for, we'd like to see every company be smarter. Right. So anything we can do to help make sure people go down the right path, if we can help them even if we don't have a package solution for them.

Frank Di Lorenzo:
A hundred percent. Yeah.

Mike Merrill:
That's awesome. Well, I guess just from each of you, what would the parting words be? What do you hope people take away from our discussion today?

Frank Di Lorenzo:
Yeah, for me, I'd say get familiar with Power BI. You can download the desktop version for free.

Mike Merrill:
Okay.

Frank Di Lorenzo:
And just start to play with it. One nice thing with any Microsoft solution is probably 18,000 maybe more, YouTube videos, Google articles, just on Power BI. It's a very easy tool to use. Once you start seeing Power BI, then you'll naturally want to ask how do I get my data more effectively in it? And that will start you down the journey.

Mike Merrill:
Okay.

Frank Di Lorenzo:
And understand that it's not, I don't want to just buy that dashboard. That's one I get a lot. I just want to purchase-

Mike Merrill:
How do I get that dashboard? Yeah.

Frank Di Lorenzo:
Yeah. It's not necessarily that. It's how to be data driven, how to have a foundational data set that you can build your company on. That would be my initial thought.

Adam Crigger:
Yeah. And I think, even though what we're packaging is this information engine, we call it. It's in memory model. That is the key because it has to go beyond just maybe the five elements of one dashboard. Right. It's got to have any different way you want to slice and dice. Right. And I think that's the best practice we'd want to kind of instill with anybody that's starting to look at it. How do you centralize and make sure you have the right balances, performance and governance and-

Frank Di Lorenzo:
Exactly.

Adam Crigger:
And all those things. So increase your confidence in data.

Mike Merrill:
There you go. Like that idea. Increase your confidence in the data. That's make a lot better decisions when you feel good about the information you're making them off of right?

Adam Crigger:
Yeah.

Mike Merrill:
Love it. Well, thank you, Adam and Frank for joining us today. This was a lot of fun.

Frank Di Lorenzo:
Mike. It is fun. I can't believe it's over already. I can keep going, but I want to thank you for having us on.

Mike Merrill:
Yeah, you bet. Yeah. We'll do it again down the road, but it's been a lot of fun and thanks for your guidance to our audience. I'm sure that many will appreciate it.

Frank Di Lorenzo:
Yep. If any questions, anybody can reach out to us. We do love this stuff.

Mike Merrill:
Yeah. And we'll link it in the show notes and get you guys connected up there as well, so.

Frank Di Lorenzo:
Thank you so much.

Mike Merrill:

Pleasure to meet you in person again, Adam.

Adam Crigger:

Yeah. Thanks Mike. You Too.

Mike Merrill:

All right. Thank you.

Frank Di Lorenzo:

Take care. Thank you.

Mike Merrill:

Bye.