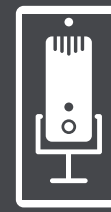


Episode: 119

# Erika Carosi



THE  
**MOBILE  
WORKFORCE**  
PODCAST

## Mike Merrill:

Hello and welcome to the Mobile Workforce Podcast. I am your host, Mike Merrill, and today we are excited to have Erica Carosi on with us today. Erica is a construction expert with the Strategies Group, who is a construction, manufacturing and distribution software and technology expert who offers a wide variety of technology solutions and consulting services. We've worked with strategies groups for many years, years now, and, uh, are really excited to have Erica on today. Um, she focuses primarily on construction technology, which is, of course, near and dear to my heart and our heart here at WorkMax. And, um, we're just excited to have her on and dig into what she claims are the first three things that, uh, she likes to explore with customers who are looking into upgrading their technology solutions and improving their internal processes. So, thanks for joining us today, Erica. Looking forward to the conversation.

## Erika Carosi:

Yeah, thank you for having me. I'm excited to be here.

## Mike Merrill:

You bet. And now you're down in Alpharetta, Georgia, is that right or that area? Awesome. Such a nice place. Uh, I've been there a few times and really, uh, enjoy the people there and getting a visit.

## Erika Carosi:

It's a beautiful area and they have really good food out there I love.

## Mike Merrill:

Yes, they do, as you can see. So, digging into the conversation, um, we talked about in the intro, the steps or the places that you start when you're really starting to evaluate with customers on what their

needs might be. So can you talk about, um, maybe what that looks like a little bit on the list, and how you kind of start the ball rolling?

## Erika Carosi:

Yeah. So, um, when, um, a company is going through some changes and they know they need to upgrade their software and make some software changes, they'll, um, reach out to a partner, usually. Hopefully, that's the best idea. And, um, what I start off with is really having that discovery call to really understand what their needs are and their pain points. And, um, then we'll go through some discovery questions and really learning and understanding what their needs are, um, asking for a list of their current technology solutions, um, that is actually really important because you'll find companies are using a lot of different Disjointed software solutions, and I think that's where their pain really begins. Um, right. There's a lot of Disjointed systems, there's a lot of manual and duplicate, um, entry. So we start with the discovery. We'll hear a lot of stories from them. Um, like recently, I'll give you a story while I was doing a discovery, and we, uh, worked with a company. They had, um, four separate departments of over 40 employees in each department. And they had provided, um, data to their mid level management team at the end of the week. They did this every week. And then that mid level management team, they they would, um, consolidate all of that data into an excel spreadsheet, and they're using their formulas, and it's in, like, one of three different systems. So there's a lot of legwork to make it all fit together. Then they'll send it to the department heads, who must consolidate the data again into a single Excel spreadsheet. And then those department heads, they'll then send the data, um, through to their final Clevel person, who must make that data work together again, and then they'll provide it to their leadership. So in this discovery, we realize that this is taking place from Monday till Thursday, the week after all of this data has originally been created. So it's taken

them, like, 50 hours of time from their management level employees at this company. It's all manually done, um, resulting in errors. Um, it just went through so many hands. So there's more errors. Right. They spent time on consolidation, um, of this data, and that wasn't the only issue. So they had a delay in getting this data, because now this is one week behind, uh, so one week of working this way at a company this size was costing them thousands of dollars in cost. And these changes were not even on a change order on a job. And so this resulted in the jobs being below target margin. So that's an example of some of the things that we discover ah, in that beginning process. And again, it has more to do with even just software. They're learning that they're doing all of this manual data, and we're going to show them how to make that better.

**Mike Merrill:**

Yeah, it's fascinating because we've had this podcast for we're going on, uh, two and a half years now. So it's been a really fun journey, and we've seen an evolution even in that time period. But if I look back, and I grew up in the industry, I've been in this industry on the construction side as a GC or the software side, for nearly 30 years now, or over 30 years. Um, uh, I've got to imagine that ten years ago, most companies just really didn't have a lot of technology. I think what you're saying is now they're starting to use a lot of technology, and they almost maybe have too much and there's, like, bloat of too many processes that don't talk. Is that right?

**Erika Carosi:**

Yeah, absolutely. I mean, it's not uncommon for us to find that construction firms are typically using six to ten software applications in tandem with their main accounting system. So if these applications are legacy systems, they're probably not very well integrated, um, if they integrate at all. And so, as a result, their entire staff is having to jump between screens just to perform these routine tasks. When they first got the software they're using, or they're using Excel or whatever, it probably was a great idea for them at the time. And it's comfortable, and it seems like it's good. But as technology is evolving, and as we're getting busier and I think they're learning that there's a more efficient way to work. And with technology like work

Max and Acumenca, we can make that happen. We can streamline that for them.

**Mike Merrill:**

Yeah, I love that, and I think you're right. Uh, even hearing you talk through and I've been in probably thousands of conversations like you on the same topic with customers and prospects, and as you're going through this cycle of companies discovering what their needs are. But I have to be honest, when I heard you describing that process, I'm putting myself in the seat of maybe a construction business owner or manager, and I'm imagining hearing that, wow, this is what we're going through to get to that. That's crazy. Do, uh, you get that response from these companies when you really hold that mirror in front of them and say, look, people, this is what you're doing, this is not efficient?

**Erika Carosi:**

Yeah, absolutely. We get that response, and I think that creates, um, a stressful situation for them, and they know that it's going to be stressful. But I think when you're really like you're saying when it's being mirrored to them and they're seeing how many I mean, just when they list out. Like, one of the questions I ask on my discovery is to list out the software that you're using. So, like I said, between six to ten software applications. But when they're seeing that and then hearing that, you can go from ten or twelve to, let's say, three or four that are actually integrated and streamlined, and you can go into one system, even though you're using three, but all your information is in one. You are saving so much time and money. Not just money on the software, the nine other ones you just dropped, but also the money on the manpower.

**Mike Merrill:**

Yeah. Now you're speaking my language. I love it. Obviously, it's critical for companies to understand, okay, here's a list of these systems. Here's what the functions are. Here's the six of these twelve that overlap. Right. Maybe you could replace one with another two, or three with one. The, um, integration, obviously, is critical and key, so you're not taking awesome systems and then manually managing the data from them. Um, uh, what kind of pushback do

you see? I mean, do you think companies that are feeling like, we're in a really great market and we've got great margins and we're making great money, we don't want to rock the boat? How do you contend with that? Or what do you do when you hear companies talk like that?

**Erika Carosi:**

Well, I think the best way to address that is when we do our demo and we show them the possibilities. You can tell them, um, a lot. Right. But a lot of times when they see it in action and they can see what you're saying, I think we're all visual creatures and we can hear and something sounds great, but until we see it so we really like to dive in there. Show them first off, like I said, doing the discovery, discovering what they have, and then tell them what we feel would simplify or help in this process, but then show it to them. And when we show them that, and even, like, when we've worked with you guys and we can bring in and we can show them the integration and how seamless it is, I think they get nervous if you don't see it. But when they see it, it puts it together. So it's very important not just to hear them, not just to do the discovery, not to just to show it's got to be a full package.

**Mike Merrill:**

Yeah. You are feeling like, in the market, there are more companies than before, or what does it look like for companies that are actually adopting a culture of improvement and innovation and trying to be better? Is that a challenge for you to get companies to get on board with that train?

**Erika Carosi:**

I have not had a challenge with that yet, because typically, they're already coming to me. It's very rare that I've gone out to I do networking meetings and stuff, and it's very rare that I'm doing a cold call or something and I've told somebody, hey, your system is bad. Typically, not that I'm going to tell you your system is bad, but, um, they've already got an idea that there needs to be some changes. Right. And, um, I think the Pandemic maybe really made that very prevalent and very obvious that we need to make some changes, because that really just threw us over. Right. And

everybody had to go remote. And now these people who had disjointed systems and they're not in the cloud or whatever, I think the Pandemic really opened a lot of eyes and made, um, the high level, the C suite execs realize that we've got to make some changes. What are they going to be doing in the next one to five years? Um right. And, uh, we get that they're going to be transitioning leadership in the next two to five years, or they need to get all of their processes integrated into the business. They need quality and meaningful reports. They want to grow their business. Well, they're learning that when everything got shut down and you didn't have access to your data, how are you growing? Actually, they probably were going backwards.

**Mike Merrill:**

Yeah. Right.

**Erika Carosi:**

They were losing business or losing their momentum, because now everything just changed. But with cloud software and with really having the right technology, um, the sky is the limit for these companies.

**Mike Merrill:**

Yeah. And when you're saying sky is the limit, you're probably talking profitability, um, ability to grow, get the bigger projects they want because they're just more lean and mean and efficient at executing on these. Is that right?

**Erika Carosi:**

That's what I'm saying. Yes.

**Mike Merrill:**

Well, I don't know if you do studies like this. I know it's a huge part of our business you've mentioned it, uh, basically getting that value back out, that return on investment or ROI. What are some common benchmarks or goals, or what are some statistics that you try and use to help companies recognize the gap in what they're missing out on in their current processes?

**Erika Carosi:**

Well, it could be difficult to determine the cost of these issues, um, because they currently don't even typically come to us with insight into their data. That's one of the problems. So, if they're running a system with no insight into their data, and, um, there's no insight into their cost, that's inherently the biggest cost of all. So, our team works with our customers to discover the cost benefits, to discover the ROI. There's even a really cool, um, ROI calculator on the Acumeatica website. So they really give you the tools when you're in that search, in that journey. So, even when they get to me, I'm like, if you will work with them, we've got partners over at Acumeatica that will work with them, and then we have the ROI calculator that they can fill in on their own, um, if they wanted to make that determination as well.

**Mike Merrill:**

I love that. So you're talking about Achievatica, and we've been talking about it. And, um, we got the Acumeatica Summit this coming weekend and next week. And I'm headed down there and excited for I think this will be my fifth in a row. I mean, we've gone to all of.

**Erika Carosi:**

Them since they fun time.

**Mike Merrill:**

Yeah, it's a great event. They do a great job. What draws you to acumeatica? Obviously, you represent filling customers' needs, and it's not logo specific, but what is it that draws you to that and makes you so excited about working with them?

**Erika Carosi:**

Well, Acumeatica is, um, a very easy to use system. Okay? So even when I came in, um, and started learning Acumeatica, it was easy for me to learn. I love all the resources they have. Um, they have an Acumeatica university that's free to anybody, even if you're not a customer. So you can really learn a lot about their modules and what they have to offer. Um, but it is easy to use. But what I really like about it is it's an open architecture. So it really makes it easy for,

um, integrations. So even if there's, um, um, got an Open API, so even if there's a program that you really married to that you want to stick with, and it may not have an Acumeatica integration to it, with the Open APIs, they make it easy to or at least easier to be able to connect those. Um, so, I've just found that Acumeatica easy to use, um, having the integrations, and people really like it. We use it. I don't just sell it. We actually use acumeatica here. So, for my whole sales process, I'm using the CRM, I'm using the Opportunities. Um, and I love it. And I love my dashboard. I need a place that shows me what I have, and I just work right off my dashboard. I'm a little OCD, so I like to have stuff in a certain way. And so when I get to share Acumeatica with others, I think that's what separates me, um, from selling, like, a lot of different technology. As far as ERPs, I mean, we work with the ISPs and stuff, but as far as my main core, um, program being Acumeatica, I use it every day, and so I'm sharing it, but I'm comfortable with it as well. And um, again, I did a lot of the education on Acumeatica's, um, university, and so if I was able to learn, that not saying that, uh, but you can really get in there and learn a lot at your own pace, on top of what maybe you're already learning.

**Mike Merrill:**

Yeah, big fan of when you're eating your own dog food, so to speak, you know, it's probably pretty good, right? So the first, uh, item you brought up is, we've got to identify what the challenges are and the gaps, what you actually have on the table, what you're using. What's the second step in the process that you go through with customers, um.

**Erika Carosi:**

Understanding their motivation for making a change. So what is their why? Right? We always hear that in the world of what is your why, what motivates you? Why do you need to do that? The common forms of, uh, motivation that I hear, what their why is almost always the number one is they desire a single financial platform, um, for both their construction, because we do manufacturing as well. But that single source of truth, because I think people are hearing the buzz that you can have that one single source of truth and still use your other software solutions that will integrate into it. Um, another motivation is they'll say that their current financial software is just not user friendly in

terms of drill downs reports, um, interactions. They'll say it frequently crashes and it doesn't play well with other solutions. So those lack of integrations and that lack of that open architecture, I think is a huge I mean, not think I get that a lot, right? That's um, like, motivation number two, always, um, again, if they're transitioning leadership, they know that they need, um, that's one of the reasons. So they know that they need, um, more advanced software solutions, and um, let's say, like having CRM and their ERP, um, being integrated so that they can advance their sales, um, and projections. And then often I get their current employee satisfaction and growth and development and the user adoption of software. And I think where User friendliness comes in, they're like, we need a more user friendly system. So our employees are satisfied, and they're able to have access to this data and information. They have dashboards they can work off of, um, and that eliminates them having to call other people to get answers, or what's our cost on this job or whatever. You can go right in the system and have that access.

**Mike Merrill:**

I love that. It's interesting what motivates different people and personas within a business. Sometimes we'll be in a discussion with maybe it's a controller or a payroll admin, or somebody that's dealing with the payroll process. And they think it's great when we can help somebody save a bunch of money on payroll. But it's really not their main focus. It's like, how can you take my headaches away? And if you could solve my headaches and it saves money, bonus. Right. But if you're talking to the CFO or the CEO, they care about the dollars first and say, we want to save that money.

**Erika Carosi:**

That's right.

**Mike Merrill:**

And if, uh, it reduces some of these headaches, well, that's even better. Right? Like, that's the cherry on top. So depending on the role. So what do you do to try and help companies understand the financial and or the headache benefits when they're not seeing it, or when they're not sure? What is it that helps you drive that home with them? Um, can you think of any examples?

**Erika Carosi:**

Um, well, again, through the discovery and through doing our demonstrations and being able to show what the system can do, how we can, um, provide an implementation into a software that's going to give them growth opportunity that can grow with their company. The majority of the people I work with are the C level executives, and they want to know, um, how this is like, is it a waste of their time, these disjointed systems, showing them these systems are not joined. You're wasting time on duplicate entries. You, um, have tainted data with misinformation because of user error. Right. Um, and this is affecting the bottom line every day. Um, we show them, through lack of insights into their data, how it's affecting their bottom line that you can't bid on jobs currently if you don't know what the things are costing you. Right. You can't effectively run a profitable business if you don't know what your numbers are, especially in the construction industry, where profits, um, on jobs are so narrow, and the small mistakes that can cost the company money. And I think, like you said, I mean, the money is that's a big deal to them? It should be, yes. Um, so when people realize how much the bad systems are costing them, they'll realize it's a no brainer to switch the technologies to, um, the right system for their team. And so, I don't know, maybe that was a long winded answer to that, but, um, yeah, that's what I have.

**Mike Merrill:**

No, that M makes no, you really encapsulated it. Well, actually, I like how you answered that. I think if you boil it down to the essence of what we're talking about, these processes are a major, uh, time saver. Which time is money. They're going to help you be more profitable and identify outliers and things that are costing you extra money that are being unnecessarily wasted. So you're going to streamline profits. They're also going to make you not only more efficient with your time in the office, but also on the projects. People aren't waiting for decisions like they would be if they didn't have access to that information. So big competitive advantage to be a leaner, meaner, more aggressively proactive on data, um, as a business, yeah.

**Erika Carosi:**

You want to bring your company into the future. You want to allow your business to grow with you. And

quite frankly, if we don't evolve, we die out. You constantly have to improve your business. If you don't, you're not going to be able to keep up. And, um, again, what you just said with a competitive advantage, if your team is working, um, really fluid, and they've got their roles and they've got their dashboards and they've got the information at their fingertips, it's a huge advantage to be able to have access to your information and be efficient.

**Mike Merrill:**

Yeah. We just came from the world of concrete a couple of weeks ago down in Las Vegas. One of the largest trade shows every year in the US. Fantastic event, as always. It's usually one of our really big events.

**Erika Carosi:**

I think I'm going to go to that next year.

**Mike Merrill:**

Oh, you should. It's, uh, something plus you'll get your 10,000 steps in the morning and not even put a dent in seeing everything there is.

**Erika Carosi:**

I bet. I bet. I know. With Acumeatica Summit last year when I could not believe how many steps I got in. And just to go downstairs once you're walking through cities and one hitting.

**Mike Merrill:**

Yeah. But it's interesting because we talked with and I won't name the name one of the largest builders in the United States and even in the world. And we were talking with this gentleman that manages a couple of different divisions, and actually one of them is in your area also. And he basically said, as an organization as big as we are and as many billions of dollars we do in revenue, um, we had a tough year last year in tracking our productivity and being efficient. With how many units of this are we finishing in this many hours and this much time? So the dollar cost of the productive units put in place, they struggled with and said, I was actually 300% of my number. Like, I killed it in this

area. And we said, wow, what is the difference? And he said, I'm tracking it. I'm tracking it efficiently. I'm not manually going through this rats now. Right. He said that actually, the rest of the country, other divisions, other teams, are now, um, studying his processes and what he's doing. We hope to have an opportunity to work with them, because when they saw what we're offering, we can take his stuff way to the next level. And so we're really excited about that opportunity and that meeting, um, to potentially work with this company.

**Erika Carosi:**

That's great. Good luck with you with that. That's awesome.

**Mike Merrill:**

Yeah, thank you. But my point is, listeners, I mean, you got to know some of the biggest gorillas in the room still haven't dialed all this in. There's still room to improve. And so don't think for a second that just because you figured some stuff out that you're sitting pretty and you're in a great spot. You may well be. And congratulations to you if you are double down on that and keep riding that wave of success. But if not, uh, to the point that's being made here by Erica and her team, there are areas that you can improve almost immediately, very quickly, by upgrading some of these processes and eliminating some of these wasteful steps.

**Erika Carosi:**

Yeah, I've done discoveries before, and actually, um, in that discovery, some of the systems that they were using, it's not that they were even bad, and they didn't even realize that they integrated with each other for all of these years. So when, um, we have people coming to us, and they're typically if they're coming off of QuickBooks right. And so they're like, I'm using QuickBooks, and I'm using this software and this software, and actually that's good. But QuickBooks is just, um, not proper for them anymore. Right. They're growing. They've outgrown QuickBooks. But what we identified in the process is to show them, actually, while you had this system, these other ones actually would have integrated. So they didn't even know that

some of the systems they had could have worked more efficiently for them. So personally, I think it's really important, um, for companies to work with a software partner. I mean, if there's something I'm going to really be, um, adamant about today, it's really working with somebody, that this is their expertise. Right. Um, because you don't know what you don't know. Like I said, yeah, they do need to get off of QuickBooks because they've outgrown it. But if you would have been working with a partner, maybe, um, and had some guidance, you would have known that even those years before you needed to get off, there was some things that could have flowed a little better for you or more efficiently and reduced some headaches and made your numbers better. Right. So it's that kind of research and really just always want to learn, just continuously want to learn. And don't get married to exactly what you're in, because you can't stay with the same software for 20 years. You can, but you've got to make sure that you can stay I'm sorry, you can stay with it for 20 years, but make sure that you're getting the updates that you're getting, the security things. Like, some people just get on it and then they're done. And they're not really doing anything to evolve with it. Does that make sense.

### **Mike Merrill:**

Yeah, that's exactly what I was going to say. And, uh, I'm glad you clarified that, because I agree on both parts. You need to be careful that you don't just stick with something because it's what you're used to. But at the same time, if you've chosen a great technology vendor, we have customers that have been with us for 18, 1715 years, like, a lot of them. And we went from, um, on premise Palm, palm Pilots, you know, to BlackBerry, to Apple, to, you know, iPhones, to Androids, to tablets, to Netbooks. And now, seven, eight years ago, we went to the cloud. So if your technology partner is evolving and adapting with solutions as they come, you might be married to a really good software partner, and you can help them be better by giving them that feedback and encouraging them.

### **Erika Carosi:**

That's exactly right, because with Acumatica, whenever I'm doing a presentation, I let them know, look, this is a software that I hope is going to be with you for the next 30 years. I literally use that number, 30

years, because it will because they are evolving, they are listening. Like one of the partners at our company actually made on the Accumatica's um community, uh, a suggestion for a recently viewed, um, uh, menu item or ah feature. And that's one of my favorite. And then I didn't know until he was doing a demo with me that he was the one who actually put that request in. So they listen, they hear it, and it's one of my favorite. It shows, like, the last 500, um, places you've been. Kind of like your Google history. Right? But when I'm in sales, so I'm always going back to this opportunity or whatever. So I go on that. But the point is, they are listening, they're evolving. So you just want to be with a company, like you said, that um, is going to be taking your company into the future and continuously making those improvements and listening to their end users and their partners. Yeah.

### **Mike Merrill:**

And an example quickly to illustrate your point on both ends. So, years ago, like probably 15 years ago, we had enough requests that companies said, um, we would really like your mobile app to be in Spanish. And so we put the work in and back. I mean, again, this is literally over 15 years ago on Palm Pilots, we had our mobile apps, um, translated into Spanish, so all the buttons were in Spanish. And we have maintained that in every version since. And then when we came out with our cloud version, it's been there from the very beginning. And so, to your point, that was an early request. That was a big, huge feature that a lot of companies wanted to enjoy and could enjoy. But even today, we have customers that would love that feature, but they forget they remember in the demo because it's a big reason that they really. Like us, one of the factors, but they don't necessarily go back and make sure that they assign Spanish language to those that would enjoy that. And so some companies have the solution. It's right there in their hands. It's just a setting. And if they they don't, if they get comfortable, like you said, with what they were used to, or how they started, or how they initially rolled it out, they may never really make any changes. And all the while, they are missing out on that opportunity.

### **Erika Carosi:**

That's right. Well, yeah. So hopefully their salesperson will kind, uh, of understand their company and say,

hey, we do have a Spanish feature. I see you have a lot of Spanish employees. Right. And they'll be like, wow, that's great.

**Mike Merrill:**

Well, yeah, to your point that's that's that's in every presentation, that is always a part of what we share, but then later, the people that buy it aren't always the people that necessarily roll it out or set it up or go through, and then we have field people that weren't involved in any of it. So they just get handed what they get handed, and they're used to not seeing it. Spanish, even if they preferred it, was because a lot of companies haven't done that. So, uh, as software vendors, we can do a better job or a good job of communicating. But as consumers and construction companies that listen to this podcast, they need to ask those questions. They need to get in those forums, they need to join the user groups, or sit in on the Webinars to learn what's going on and ask those questions. Because again, there are many situations where you could be enjoying a much simpler process or integration that exists that maybe you're just unaware of.

**Erika Carosi:**

Yeah. And maybe they fear. And the reason I say that, um, before I started working at Strategies Group, um, I worked, um, out in the field. I rented, um, construction equipment. I'd go out in the field a lot. And then I ended up, um, going over to a software company that managed, rented, and owned equipment. So there was, um, one customer that I went to see, and when I walked in, he had the most impressive and out of this world, entire wall, all the way around. It was a whiteboard. And that's how they managed all their equipment. And I said, oh, boy. Why? Oh, because technology is going to be too long. I said, Honey, I don't know how that's I'm, um, talking from the top to the bottom, all the way. And he was efficient with it, but imagine the time they could save. And I'm like, are we afraid of technology? Because it's okay if we are, but we should hear it. We need to embrace it.

**Mike Merrill:**

Right? Yeah. Uh, great idea to have a whiteboard for a strategy session and for envisioning something, but not a great document management solution.

**Erika Carosi:**

That was the document management solution. I was blown away, actually.

**Mike Merrill:**

Yeah, I've seen that a lot, too. We've gotten through the first two. Um, maybe let's round out your third, uh, your third approach, and then maybe we'll have you back on next week and talk a little bit more about this process, because I think we're having a great conversation. I definitely don't want to cut it short, but let's talk about the third process. What does that look like for you?

**Erika Carosi:**

So the third process, um, I ask them. I need to know from them what are their three must have for technology. So we know that you have a need. We know what the pain points are. But what in your opinion? Because, again, you don't always know what you don't know. Um, and what I'm commonly getting is, um, and it's very common. Number one is always integrations and user friendly. And they want it to combine the department needs, like your finance or project management, your payroll, HR. So, again, pretty much getting them that single source of truth. Um, and the integration, it's always so important, because if they're using something other than just an ERP, then whatever they're using needs to go. They need to integrate into that ERP. And so having that single source of truth, it's crucial to their business. So I think that's why we get that integration, like being the number one thing all the time. And when you don't, like we mentioned, when your systems do not integrate, they run into duplicate data entry, and they're wasting time. So then we get through what the top three must haves are, um, that we could at least talk on or show during the demo. That doesn't mean that they won't discover during the demo. I said I must have these, but



you just showed me that, and that will change my life. Having in a widget on my dashboard, showing me my compliance on these jobs are about to come up. And I can see it like, that is saving me so much time than having to go to this spreadsheet, find out where that is, look on this, and see if in a file folder, if they actually set the certificate of liability or whatever rate.

**Mike Merrill:**

Right.

**Erika Carosi:**

So, um, that's that. And then we also, um, try to get them to understand the difference between what's a must have and a nice to have. Right. And this will be different for every business. So we have them sit down, um, with the team and their technology consultants, and then we'll make that decision. Not saying that if there's a nice to have, that doesn't mean that you won't get it in the beginning. Not that you can get whatever you want, but showing them again what is the best use of your money, because we have to do your data migration implementation, all of that. Right? So we, um, try to really sit with them and guide them through the must have nice to have. So we get them what they need to make a difference.

**Mike Merrill:**

That's awesome. Well, that's a great one to end on for today, but thank you so much for joining us. It's been a lot of fun.

**Erika Carosi:**

M, yeah, thank you so much. I've really enjoyed being here.

**Mike Merrill:**

Yeah, it's been great having you on. So as, uh, a takeaway, what's the one thing that you hope that listeners get from today's episode? Hopefully they'll turn into next week, uh, or tune into next week and get what we have to share then. But, uh, for today, what do you think?

**Erika Carosi:**

So for today, I would say, um, just understand when you start this process, that digital transformation is complex. It's going to require a wide range of support. It's, um, going to require your dedication and your persistent effort. Um, it's not a one time process with a defined end point that's actually going to be an ongoing journey for you and you kind of want it to be an ongoing journey, like we said, because of the evolving of technology. And it's going to continue to evolve alongside with your fluctuating external circumstances such as, like we mentioned earlier, the pandemic. Right. So my takeaway would be work with an experienced software partner. Um, and most importantly, don't forget the human factor. Everyone in this organization, the leadership team, the employees, you all have to be ready, willing and able to use, um, this newly adopted technology. Because if they're not, then this promising technology is just going to become a useless expense.

**Mike Merrill:**

Great words. Well, thanks again, Erica. Have had so much fun today and look forward to having another conversation here soon.

**Erika Carosi:**

Thank you so much. Me too.