Episode: 120
Erika Carosi

THE
MOBILE
WORKFORCE
PODCAST

Mike Merrill:
Hello and welcome back to the mobile workforce. Podcast. I'm your host, Mike Merrill, and today we are excited to sit back down with Erica Carosi, who is a construction expert with the Strategies Group, who is a construction, manufacturing, software and technology expert offering a wide variety of technology solutions and construction services. Erica and I spoke, uh, last week and, uh, talked about the top three things, or steps that they look at in helping businesses like yours adopt new and improve technology solutions. So today we're going to finish out that conversation and dig more into what those other remaining steps are. So, thanks again for joining us, Erica. Looking forward to another great conversation. Awesome. Well, it's been so long. Has the weather changed since we last spoke?

Erika Carosi:
Um, no, not much. It's still a little chilly, but the sun is shining, so that's a blessing.

Mike Merrill:
Oh, good. I think the sun is always shining in your world. You have a nice smile.

Erika Carosi:
Thank you.

Mike Merrill:
All right, so, uh, back to the conversation that we started last week. Um, let's talk about the next steps. Um, maybe let's recap, uh, quickly what we talked about last week, and then let's lead into step number four, if we can.

Erika Carosi:
Okay, so, um, we discussed the first step is, um, the discovery and understanding their needs and their

pain points and, um, what they use now to process their information. And, um, then we dive deep into understanding their motivation and their why on why they need new technology or why they feel they need it, or what their pain points are. And then we, um, stopped with learning their must have features versus their nice to have features of the new technology.

Mike Merrill:
Awesome. Well, so then, um, now that we've recapped those, what's the fourth step?

Erika Carosi:
So, the fourth step, um, is having them. And I think we kind of touched on this on the last call, but I have them write down or tell me, and I write it down so that they see it when I send them an update, a recap. What technology are you currently using? And I find that one to be so interesting because you think that we all know what we're using, right? But we don't. When they go in and they start to see that we're at number eleven and we're at twelve and we're at 13 hold on, we're using this. We're using Excel. We've got this for the financials we've got they start to think, Whoa. You know? So I think that really opens the eyes to see. Again, that's a lot of work. And you're paying subscriptions on every one of those. Are they integrated? There's so much that opens up when you start listing what your tech stack currently looks like.

Mike Merrill:
Yeah. And, um, there's so many nuances of different solutions. I mean, there are different owners, different founders, different visions of how to do something. So, uh, I commonly talk with companies that literally have three similar products that are used by different teams. Maybe certain projects, they use one, but then the same guy on another project the next day might be using another. That's just crazy to me.

Erika Carosi:

Right, you're right. I didn't even think of that. But actually I've experienced that before, too, where maybe three or two of the twelve that they put there almost do the same thing. So you start to think, do you all know that these are pretty similar and that you're paying for subscriptions for three things that do the same thing? But it gets lost. Things get lost and business happens. It just keeps happening. It's going, it's going, it's going. And so they think, oh, we need to get this. And somebody says, oh, I have a good app, or I know a new program, or I got a great whiteboard that will work. So it's like, well where's this information? It's on the whiteboard. Well how would I get to it? Well, it's in the system too, but where's that at? Oh, it's on this spreadsheet, but how do I get to that? But I don't have access to that sheet. Well that express that sheet that they need access to. They don't have access to your whiteboard because they're remote. They don't have access to your Excel spreadsheet. So yeah, it ends up being chaos.

Mike Merrill:

Or did the cleaning crew on the weekend accidentally literally wipe your, uh, whiteboard server? They wipe the server.

Erika Carosi:

I don't know how I would sleep if all of my important information was just on a whiteboard and I had to leave the office because I'm a bit of a control freak. Like that may stress me out bad. I would not sleep. Right.

Mike Merrill:

Yeah.

Erika Carosi:

So we look at their tech stack and it's very important to, um, look at what you've already got because um, like you said, they may already have the solution that they're looking for. Sometimes, um, people think that their system is broken, but it really just needed to be updated or assessed. Um, sometimes they have systems that can integrate with another and they didn't even know it, which we mentioned that last time. So um, assessing this and what you have is really about

making sure, um, that you're using what you have and that, um, you don't have to re, implement, retrain and spend more money if we're going to keep that. But we don't really find too many times if you've got twelve solutions that we're keeping those because that's kind of pointless to come to us. Right?

Mike Merrill:

Yeah. We had a survey that we conducted a couple of years ago and uh, they basically said every company at that point, and I think it's actually a higher number now, had between six to nine applications on their smart device. And I think that's probably almost doubled for a lot of companies now. So there is more to weed through to get to and it's like, I have the same problem with my own personal iPhone. I probably have 70 apps on there, and I probably use regularly, like 15. I keep deleting. I'm like, I don't use it. Don't use it. Yeah, but I redownload them. I'll redownload it if I really think I need it. But yeah, now you're making serious I'm going to count them.

Erika Carosi:

Now you don't even have to count them. Just go into your settings and go to General and it'll tell you. Look at you. It'll tell you, definitely. But that's a really good example on comparing, like, software and what we were talking about in our cell phones. Right. We have so many apps that you end up not using, and it's really a great comparison.

Mike Merrill:

Yeah. And you might have five that really do the same thing.

Erika Carosi:

Yes. Like, um, the photo touch up one.

Mike Merrill:

Yeah, I know. I got a little screen of those things and look, it still doesn't help.

Erika Carosi:

This is fun.

Mike Merrill:
Yeah.

Erika Carosi:
We digress into what my next thing I was going to say is it's important, um, understanding what you have and learning from our mistakes. So, like what we said about the cell phone, um, we have X software or X apps, but we realize we're not even really utilizing these certain features. Um, and that's good to know for when you're looking into systems in the future. Because, again, like you said, you could have some that you've just maybe at the time that you got that software, you didn't need certain features or functionality, but as you've grown and evolved, you did. And so you didn't even know that what you need currently, you may already have.

Mike Merrill:
Yeah, I actually think and it's what I said earlier, and I really believe this, I think they know it's important. I think it hits their priority list initially. I think they have even if we always ask for the top three, we ask the top one, what are we going to solve for everybody? But we have probably three. And then there's a longer list. And I would say nine out of ten times that top ten list looks great, is great, is what they want and need. But a lot of companies, they get to, uh, the top three on implementation and rollout and training. And then when the onus becomes more on them to get the rest of those things dialed in. I just think they don't have the time. They're busy. They don't feel like they have the time. They don't reround and get back. And so it could be years before they even remember to think, oh, that's right. We were going to replace our paper things and our spreadsheets with this form piece of the solution. And they just don't get back to it. And so it's terrible.

Erika Carosi:
Yeah. Uh, that is terrible. But I think it's important that they have a key person. Again, having that team. Like we said earlier, everybody needs to be on the same page. Um, and so you got to have somebody that's kind of taking the charge ah, the point person. Right. So that they are keeping it on track because it's so easy to just get busy. And this isn't like a very quick process when

you're changing software or even doing research on it. You could go down a rabbit hole and feel like, okay, here we go. I just looked up and it's a year later. You really can get deep because there's so much out there and there's so much information. Um, again, that's why I feel like working with a partner is really the best idea. Um, they have that expertise. They've got the practice every day of working and seeing what new and improved solutions are out there to fit your needs, and especially when you've got partners that are focused on a certain industry right. Because we know what is going on. What, um, help you understand what's working and what isn't in your industry?

Mike Merrill:
Well, you're a coach, right?

Erika Carosi:
Yeah.

Mike Merrill:
Michael Jordan had a shooting coach or Tiger Woods has a swing coach, right?

Erika Carosi:
That's right, Erica.

Mike Merrill:
Yes. I like it.

Erika Carosi:
I like it because I was terrible at sports, so I'll be the coach.

Mike Merrill:
But good at tech. Cool.

Erika Carosi:
Yes. Good at tech, terrible at sports. My kids took that from me.

Mike Merrill:
I love it. So one of the things that we a, ah phrase that we use around here commonly, and I think it's just applicable in life and everything else, it's like taking out the garbage at home, right. If everybody takes the garbage out, inevitably someone's not going to take the garbage out. So if everybody owns it, nobody, uh.

Erika Carosi:
Owns a good one. I like that. I'm going to start using that for my son, too, when he's like, why do I always have to take the garbage out? I'll tell you why. I have some great information for my friend Mike. You got to own it. I love that. Yes, that's it.

Mike Merrill:
And it doesn't mean that I do at my house, I take the garbage out. It doesn't mean my wife doesn't remind me or that I get upset when she does nine out of ten times when she says, did you take the garbage out? I'm like, yes, absolutely. Because I already know I'm going to do that. Right.

Erika Carosi:
That's right.

Mike Merrill:
So I have a process in place to make sure that that always gets done. And actually, honestly, I never forget to take it out.

Erika Carosi:
That's awesome.

Mike Merrill:
If I'm out of town or, okay, well, now sometimes it doesn't go out because I owned it and I wasn't there. So if we look at this in a technology lens and say, in our company, we need to have people that have stewardship over this thing. So in the field, your foreman or Your site super or somebody who's managing labor and production and the project, they need to be responsible to make sure that the data that Needs To go in Those applications is Being collected so

that the business Back at the office has that, uh, that the cloud Is being fed with that real time data. And otherwise it's paper and spreadsheets, and once a week there's a data dump. And it's three weeks, like you said, later, before anything meaningful actually hits, where you can make a decision off of it. And so by bringing that back to the single source of truth, which you mentioned, having that single place where everything originates, that's the answer right there. Like, make the guy accountable. That's actually doing the widget or turning the nut, or doing the weld, or pouring the concrete, they know better than anybody when and what. So give them a great tool to collect it. And you're going to enjoy the benefits.

Erika Carosi:
Yes, absolutely. And, um, when we do our implementations, which is actually our fifth step I don't know if I'm jumping ahead here, but, um, the fifth step is evaluating the time frame and the implementation process. And while you're working with a partner, we're working with you to pick or assign those key people that we will be interacting with, that we're going to make sure that they're being held accountable and then they in turn or they're passing that on to their team by having accountability and having milestones that they have to meet when it comes to training, um, and implementation. So that we work with you to make sure that we're picking your subject matter experts that are going to be dedicated. There's a project manager who in your team is going to be the project manager, the point person that we're going to go to, right? That's what you're saying? Pretty much, right, yeah.

Mike Merrill:
And I don't know if it's the same for you, but I think this is good for the listeners to hear, uh, what we have found. And I'll tell you that we put in a new phone system, like three years ago, and we're actually changing to a new one. Again, uh, back to the point, right. The one we had wasn't broken, but we found something a little more efficient, a little better integrated. We're actually going to save on cost. Um, we've had some challenges with the performance of the existing tools, so we're looking to replace it. But, um, when we got this last phone system, I won't mention names, but, uh, they gave us homework, they gave us some information to review. They gave

us things to fill out and submit. And we got there to our meeting and back to everybody owns it. Nobody owns it. We had some of the information filled out that we did as we finished up the first meeting, but nobody really was held accountable by themselves or by whoever to complete the rest of that. So we get on the call and the project manager with this phone system company said, it doesn't look like you guys were able to complete the information that we need. We're going to have to reschedule this call. And we're like, uh, no, we need our system in place. We have a deadline here. And he goes, it didn't seem like you guys were worried about the deadline because you didn't do what we need and I can't move forward without all this information. And some of it wasn't something that we could just answer right there. So he said, I'm sorry, we're going to have to reschedule. And it was like, oh, crap. We were like, huh? Ridiculous. Yeah, I'm a part owner in this business, but I felt like I was being scolded a little bit. And he was right. And I thought, oh my gosh, this is what we need to be doing more with some of our customers on new implementations. We need to do a better job of giving them homework. I think where the fail point was maybe this project manager, uh, of the phone system company didn't follow up enough with. He didn't necessarily assign a point person. We did it by committee. And so he could have helped advise us to choose someone to say, I will get this completed by such and such a date and then we'll be ready for this call. We didn't have that. But I learned from that experience that, okay, his approach is totally correct. And he's right. We messed, uh, up. We really weren't ready. We were expecting them to carry all the weight.

Erika Carosi:
That's right.

Mike Merrill:
He needed us to carry some that's right. Successful.

Erika Carosi:
Yeah. When we work with our prospects, um, who become customers. But even in the prospect phase, it's a partnership and there's going to be, um, expectations, um, for the prospect that there's information they have to provide or fill out, they, um,

have to have someone running the project. Um, we have to have them assign that decision maker that in the end, they're making sure they're taking note of what the team wants, um, by still driving forward the needs of the company, our point person. But you have to put in some time and commitment because it's a big deal. And for what we're doing on our side, whether it be showing you the product or really trying to discover what your pains are, we're investing our time into it. Right. So, um, we need you to invest your time as well, because at the end of the day, it's going to benefit you. We're going to do our best to help you by keeping it organized. Who's our point person? Who's the go to person for this? But otherwise everybody's got to do your homework. Mike right.

Mike Merrill:
Yeah. And we only all want, I mean, as, uh, technology providers and solution providers, we only all want all of the implementations to be successful. We want everybody to love what they have. So we're going to try really hard to help them be successful, to the very best of our ability. Right. Software is just the tool used to execute on the plan. Sometimes the plan is equally as important as the system that you're going to use. Right.

Erika Carosi:
I 100% agree with that. The plan, the system, your partner, who you're working with is very important. The implementation, how they're going to train your team, and then also on their side, how your team, are they coachable? Are they open to this process? Has everybody been communicated that this is a big deal, we're putting a big investment in time, um, of searching for a product, but then once we've made our decision, it's a big investment financially, but it's a big investment in our people. So how committed on that side, on the prospect side, or the client side as well? So there's a lot of commitment expectations on both sides. So everybody's got to carry their weight. But that's my fun part of the entire job. I don't like to be called sales, because, again, uh, like I mentioned to you, I have not gone and had anybody that I met on the street say, oh, yeah, I need you. They typically are already. So it's not like I'm out there selling, like, cookies or something. Right, right. I love what I do, because they're coming to us. Uh, they know they have a need, and then I can help dig into it like an investigator and find these

solutions and figure out what I know that can help them and what I don't know. I love to try to learn to help them. Right. Because people come to us, and maybe they didn't even need an ERP, and I've been able to get them on, like, a WorkMax or one of our other ISVs. And, um, I had the most beautiful email come to me where she said, you did not let us down when we told you that we worked with these other partners, and they said they couldn't find anything for us. You promised me you wouldn't do that. And when Accumatica wasn't the fit, instead of running off, you got us with the best software. And it had nothing to do with what I sell, but that's what I love. I love to help people, and I love to find solutions to make their day better so they can go, um, to that soccer game with their kids, because they're not trying to go through 18 different Excels or a whiteboard to figure out what's happening. The next day, they run a report they're done. They can get it from their phone now with our mobile app and, um, you know, check their forecast or whatever for their job while they're sitting at the soccer game. That's what I like.

Mike Merrill:

Oh, uh, that's beautiful. Yeah. Yeah, we we love that, too. And I think you mentioned something else I don't want to gloss over. You said. Are you Coachable? And I think that's a great question for the listeners to be introspective on and say, are we? Not me as an owner or me as a project manager, me as a foreman or a CFO or whatever. Are we as a company coachable? Are we teachable? Uh, and if they are, then when they find a great partner, there's probably a lot better opportunity for them to be successful, which is, like I said, we all want to help these customers be successful. But there is, uh, a requirement for more than just one set of hands on that rope that you're pulling in the tug of war.

Erika Carosi:

That's right. It's a major commitment for everybody. And, um, what I love about our team so much is whenever we close a deal, that is not the end of the road for them. Right. They work with us, then they go to our consultant implementation training, then we have a customer Success team, uh, that we are always there with them as they're evolving, looking for new solutions. So be coachable, make it fun because it's not

a fun situation. It's not always I don't want those rose colored glasses to be like, oh yeah, this is going to be great. No, it's a lot. It's a lot that goes into it. So, um, get ready for the ride.

Mike Merrill:

Yeah. It's stressful. These projects are not easy and they won't complete themselves. Right. Just like building a building, it takes a lot of planning and work to execute on it. And I think software solutions and systems are very similar. You got to start with the footing and the foundation and you've got to have rebar to strengthen, uh, this building, this project that you're putting together so it doesn't fall apart. And we want those underpinnings in a software implementation where, okay, we've got steps, we've got processes. We're going to go about this methodically so that when the wind comes and the rain comes and beats down on the building, it's going to stand and you're going to be successful. And, um, I just appreciate getting to know you more, Erica, and more about your organization because we know Strategies Group has been around a long time. We've worked with you for almost two decades and lots of customers that we have in common and future customers that we hope to get. But most of all, we appreciate what you do for our community because again, like you said, you want people to make it to the soccer game. You want them to have their reports on their cell phone at the drive through, picking up dinner on the way home, or not having to sit in an office and crunch numbers until after dinner on Friday night.

Erika Carosi:

That's right. Amen. I love that. That's exactly the point that we're making here. Right. It's powerful. Technology is powerful. I love technology and, um, I just think that it really can improve our lives and it can be scary and it can be overwhelming, but people just embrace it. Don't be afraid of technology.

Mike Merrill:

I love that. That's a great one to end on. So don't be afraid of technology is what Erica says.

Erika Carosi:

Don't be afraid of technology. And remember, this is my fun little quote that I like to say, okay? Adapting and improving technologies is the reason that we don't need to unplug our phone line just to plug into a modem anymore. Can you imagine if right now, we're trying to do the ERP talk and our ISPs, and we all have to go plug into a modem? Let's embrace it and love it. Right now, we're in the cloud.

Mike Merrill:

I'm with you. I love it. Awesome. Well, thank you so much for joining us here, because it's been a delight to have you on, and I know our listeners are going to enjoy the advice of wisdom that you shared.

Erika Carosi:

Thank you. Thanks for having us. And I'm really, uh, excited that we've worked so long with you guys. I love working what we're work, Max, so thank you.

Mike Merrill:

Thank you. And we'll do this again down the road. And I can't wait to see you out there somewhere at, ah, some of these fun events.

Erika Carosi:

Thank you. You too. Take care. Have fun at Summit.

Mike Merrill:

All right. Take care. Thanks. Bye.