

# Digital Podcast Show Notes

## Episode 40 with Alan Berkson

**Hosts:** Barclay Rae, Ian Aitchison

**Guest:** Alan Berkson

### **Greetings section**

BR: Welcome

IA: Today's trivia is... innovation. A robot has performed surgery joining the intestines together of 4 pigs (not to each other, obviously, each separately). And Wordle.

BR: Today's guest... hello Alan Berkson. Who are you?

AB: Head of analysts relations at Freshworks. Started in communication strategy and then moved to evangelist, and then into analyst relations. The coolest job in the company.

IA: I agree. It's a very cool job.

AB: It's about Influence and Insight.

BR: and maybe not very well understood by others.

### **Detail section**

BR: So, Alan, what is the key to getting market success.

AB: It's Trust. Trust in the product and Trust in the vendor. Is it going to help me. The analysts are a way to prove that there can be trust. It's important that analysts have an accurate view.

IA: Because you want the right profile customer for you, not a bad fit.

AB: Its important to attract and retain happy customers.

BR: I sometime advise on which products are the next fit. I don't understand why organisations change their products so frequently. How do you make sure that the buying princess includes trust?

AB: It's more than tools, its also about people and process. We can switch tools, but if the people and process are broken then problems can still remain. You must have all 3 in place.

IA: Trust... What about outside of IT? Is there a need for trust across a business?

AB: Yes, now it is all about being a Partner with the business. Not a dictator. Trust in IT is important. Now people are caring more about happiness. I have previously used the acronym PET - Proactivity Engagement and Transparency.

Proactivity is Listening.

Engagement is about Collaboration and connectivity

Transparency comes down to honest communication, here's what we did where what we did wrong.

All three of those build Trust.

BR: Back to ESM... What - from a communication POV - we need to do to get SM beyond IT?

AB: Find ways to be in the conversation. How are we going to measure our success. Less technology, and more outcomes.

IA: Outcomes and conversations is a big shift. In product creation it is all out outcome first.

AB: Ideally, IT should be proactive coming forward and suggesting ways to improve.

BR: Getting a seat at the table is important. It's not easy to get there always. What about Fereshworks - are you doing more ESM work?

AB: It starts with ITSM then expands outward to HR for onboarding of Facilities Management. It's a good fit with mid-tier organisations.

IA: Is there a too-small and too-big problem with ESM and a sweet spot where it works?

AB : Well large organisations can do it but it takes time.

BR: What are big changes coming in the landscape?

AB: I see productivity and analytics as hot areas. Help me get more value and help me engage and scale better. Communications and conversational interfaces.

IA: It's gone beyond Self Service Portals? Is that an old concept?

AB: Yes, people started looking for Amazon-style interfaces which has browsing value, but not people are looking for other channels.

AB: managing expectations is the most important thing you can do.

BR: I dont like having many different places to go to do things, it can be confusing if there are too many channels. The navigation needs to be intuitive.

AB: That's the People and Process side of it.

BR: Having a service communications person is really helpful.

AB: and that comes back to partnership and communication.

BR: Should vendors do more to provide guidance and help?

AB: Whatever one you are selling of the three Tools, Process and People, the other two are your thought leadership and advice. It is helping people get better positions.

BR: Is ESM still a thing?

AB: For midsize orgs, it is the right thing now. High value for the right orgs.

### **Alan's Recommended Drink**

- Pisco Sour.

### **Useful Links**

Twitter: <https://twitter.com/berkson0>

LinkedIn: <https://www.linkedin.com/in/alanberkson/>

### **Bar Bio**

Alan's Twitter bio says 'I like to stir the pot. Often I make a mess. But sometimes I get soup.' I like that a lot, although personally I'm not a fan of pea soup. Alan, however, is a fan of a Pisco Sour when he is not stirring up a delicious and nutritious analyst relations soup over at Freshworks (where he can be found under the label Director of Global Analyst Relations. He also calls himself an asker of questions, although on this podcast he spent more time answering them than asking. Thanks for guesting with us Alan!