

Welcome to the CIO Hour!

May 2025

Becoming Your Best Customer Self

Today's Panel



OLIVIA WILKINS

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Olivia Wilkins was part of the AMS implementation teams for two associations where she facilitated end user training, delivered business and process analysis, and provided data management. Before joining the world of associations, Olivia taught a variety of grade-school subjects and undergraduate coursework where she honed her craft evaluating how people learn and engage with systems, processes, and environments. She combines two decades of experience in education, change management, and analytics to improve user adoption and foster strong relationships between technical and non-technical teams. Olivia joined PerByte in February 2022 as the Business Analyst/Project Manager.



JAMES C. MARQUIS

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James C. Marquis is a seasoned senior executive with more than 30 years of experience working in technology with a wide variety of associations and nonprofits. James' work experience includes serving as CIO for a large medical association, CEO of a technology consulting organization and senior roles in product development and business consulting with for-profit and nonprofit clients. He also has designed and built multiple Internet-based business applications including Mojo Middleware™.

The CIO Hour: Becoming Your Best Customer Self

- Tackling the problems and questions that are on your mind with real-world technology advice
- Featuring experts in their field with decades of real-world experience
- Usually the first Thursday of every month



Visit www.theCIOHour.com for upcoming topics and events.

Ground rules...

- No question is off limits!
- If the question is too specific to a particular situation, we may defer it but are happy to talk to you offline or after the event.
- This is a safe space, but we understand if you wish to remain anonymous.

Agenda

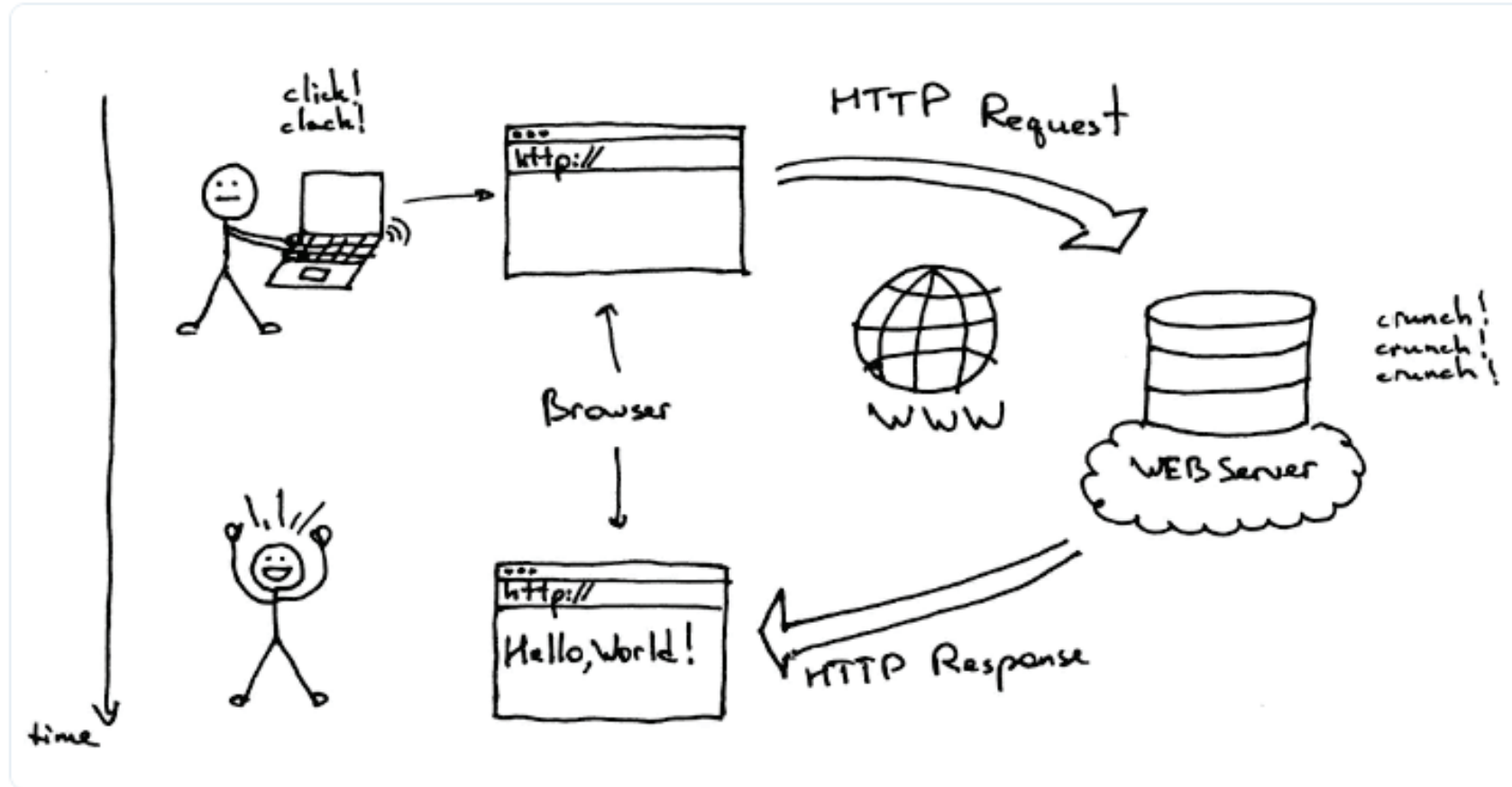
- In the News – A few highlights that might interest you
- Fast Facts – Introduction to the topic of the month
- Q & A – 40 min – Discussion with our experts and taking your questions
- The CIO after Hour – 30 minutes of open mic discussion

In the News...

1. Google Just Sent an Email to Nest Customers. It's the 1 Thing No Company Should Ever Do
<https://www.inc.com/jason-aten/google-just-sent-an-email-to-nest-customers-its-the-1-thing-no-company-should-ever-do/91181461>
2. Are you REAL ID ready?
<https://www.dhs.gov/real-id>
3. The 'father of the internet' and hundreds of tech experts worry we'll rely on AI too much
<https://www.cnn.com/2025/04/02/tech/ai-future-of-humanity-2035-report/index.html>
4. 14 reasons why Trump's tariffs won't bring manufacturing back
<https://arstechnica.com/tech-policy/2025/04/14-reasons-why-trumps-tariffs-wont-bring-manufacturing-back/>
5. World Password Day 2025: All the news, updates and advice from our experts
<https://www.techradar.com/pro/live/world-password-day-2025-all-the-news-updates-and-advice-from-our-experts>

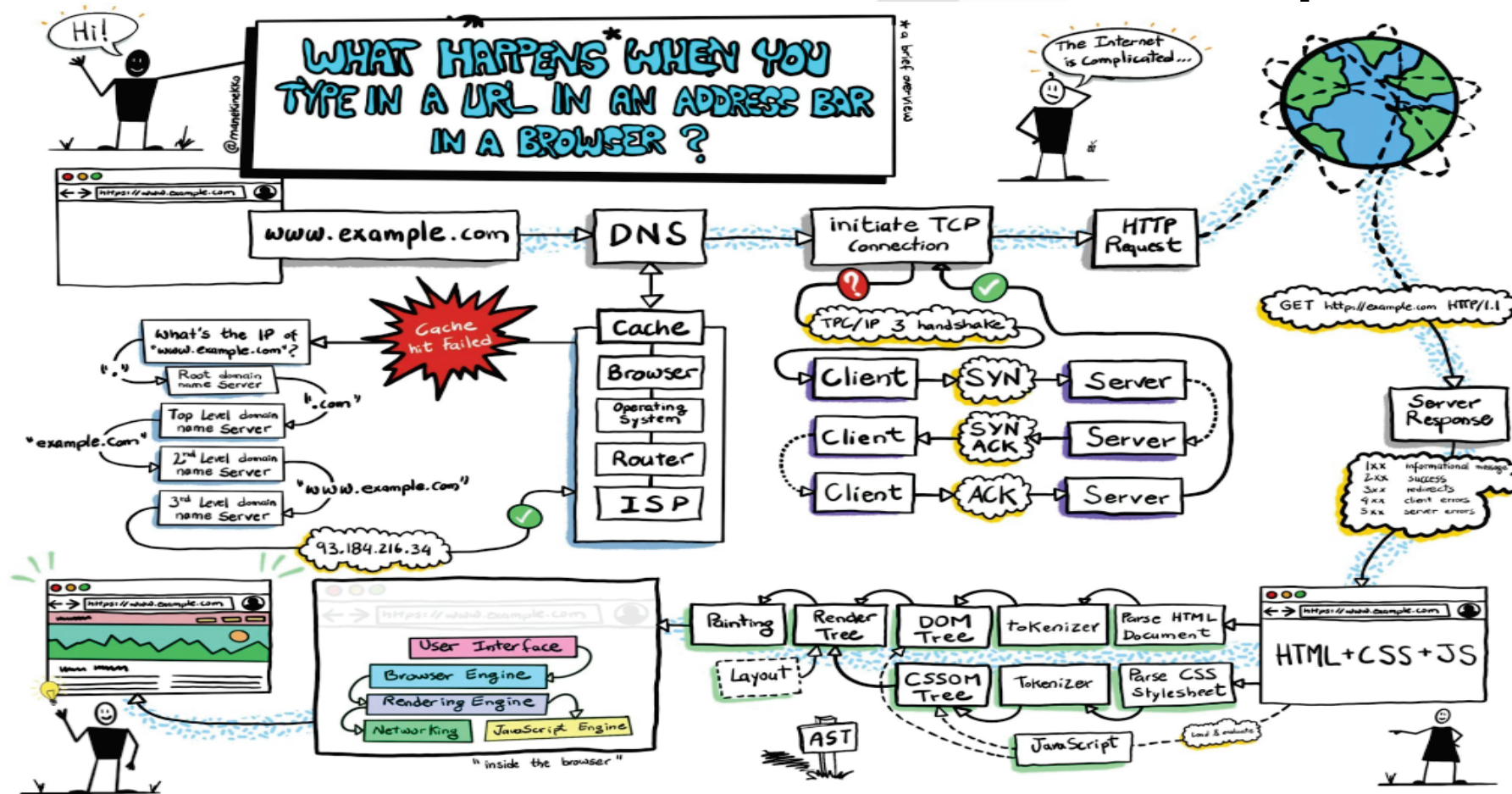
Today's Topic: Becoming Your Best Customer Self

Quick Take: How does a Browser Work?



Source: <https://www.browserstack.com/guide/what-is-browser>

But it is a *tad* more complicated...



Check out this diagram by Rajeev Barnwal

Source: <https://www.linkedin.com/pulse/have-you-ever-wondered-what-goes-behind-scenes-when-type-barnwal-njapc/>

On to Your Questions...

What are a few of the characteristics that make a “good customer” from a support perspective?

Top 10 “Good Customer Traits”

1. Clear Communication
2. Patience and understanding
3. Responsiveness
4. Documentation Skills
5. Preparedness
6. Willingness to Follow Instructions
7. Respectful Demeanor
8. Technical Self-help Attempts
9. Organizational Skills
10. Constructive Feedback



What are some tips you would have for better troubleshooting?

Are there things we can do to monitor for problems?

Why do things always seem to go wrong at the WORST possible time?

What do I do when an integration breaks and vendors start pointing fingers at each other?

Why do so many of our emails seem to never make it to their destinations?

Quick Case Discussion...

Actual Support Request:

Hi Support,
I still get an error when using trying
to log into the FTP site.

protocol: SFTP
hostname: upload.xyz.com
port: 22 (SFTP default)
username: USER-NAME
password: d93k4jk94oj4f90f



What is the best way to escalate issues with a vendor?

Any last parting advice,
especially for smaller organizations...

Other Questions?



Thank you to our expert!



Olivia Wilkins

Business Analyst/Project Manager

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WORKS for your association.

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Final Thoughts

- Join us June 5th for **Spring Cleaning Your Data**
- An archive of this presentation and today's Webinar will be posted on theCIOHour.com in a few days.
- Any suggestions for future programs? Topics you would like to see covered? Please email us: theCIOHour@501works.com
- For CAE credit – you will receive a link via email tomorrow so you can claim your certificate. The rules have changed...