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Thoughtful CRM at omnichannel scale: Insights from GFiber Customer Communications Lead Trish Magnetico

Host: Alan Hart, leader in marketing and customer strategy, Deloitte Consulting LLP

Guests: Trish Magnetico, Customer Communications Lead, GFiber

Alan Hart: Today we're recording at Salesforce Connections in Chicago. And today on the show I have Trish Magnetico, customer comms lead at GFiber. Tricia is building and scaling CRM programs at GFiber with hundreds of signal-based campaigns and expanding into new channels like push and SMS.

She spent her time at Ring, Amazon, UMG, and now GFiber, but she initially got her start in biological anthropology studying chimpanzees. So on the show today, we'll talk about going from monkeys to marketing, building and scaling CRM, and much more with Trish Magnetico.

Alan Hart (voice-over): Are you ready to go beyond the basics of marketing? I'm Alan Hart and this is Marketing Beyond, where I chat with the world's leading chief marketing officers and business innovators

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to share ideas that spark change and inspire you to challenge the status quo. Join us as we explore the future of marketing and its endless potential.

Alan Hart: Well, Trish, welcome to the show.

Trish Magnetico: Thank you for having me.

Alan Hart: Yeah, we are here at Connections. There's probably some noise that's going to be in the background of this, but before we get started talking about business and Salesforce and all the ecosystem that you're working with, I hear you've got some competitive kiddos. Tell me about that.

Trish: I do. I have a 7-year-old competitive dancer and a 9-year-old competitive gymnast, who both are very dedicated to the sports that they do. They used to do the same sport for a while. They were both gymnasts for a while, and that raised a lot of chaos in my house. I mean, they both have been climbing on things since they were 18 months old, and now they are... they're something!

Alan Hart: That's a lot. That's a lot. So, gymnastics and dance?

Trish Magnetico: Yep.

Alan Hart: So you are also a dance mom?

Trish Magnetico: I am a dance mom. I feel like I live six different personalities, outside of my work chaos.

Alan Hart: Yeah.

Trish Magnetico: And I'm a dance mom. I'm a gymnast mom, which is a whole other breed of, competitive parents. But my husband actually just recently became a dance dad. And my youngest conned him into doing Dancing Dads at their dance recital. So now, every time he makes fun of me for being a dance mom, I have a photo of him in a cowboy hat with her next to him literally dressed up and dancing. So, it feels like it nets out the right way.

Alan Hart: That's amazing. Well, you're doing a lot of work that a lot of marketers, senior marketers, that I usually talk—like, CMO-level marketers—probably don't see day-to-day. The work that you're doing, the builds that you're doing. How did you find your way into marketing, and then how did you end up in CRM as an offshoot of marketing?

Trish Magnetico: So I stumbled into marketing, in general, very much because I was the only intern who knew how to code anything, and MySpace coding skills came into use when they needed to send out intern events. I was interning at the Museum of Natural History, and they couldn't find anyone to run their Facebook group. They had no one doing anything, and I raised my hand up, like, hey, I can code this for you. I'll send it out. Don't worry about it. And then that turned into, well, can you code our donor emails and can you—you know, it was very early—it was 2010. Can you code our store emails and our other updates? I'm like, yeah, sure, so I can. I wound up landing a part-time job while I was still in college.

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And then, I didn't go to school for anything related to what I do today. My job has absolutely nothing to do with my background.

Alan Hart: I hear you were a biological anthropologist or something? Do I have that right?

Trish Magnético: Yeah. So I went to school for biological anthropology, and my focus was on human evolution. I actually did a lot of research with primates, and my focus was on the hyoid bone and what gives you the ability to speak and how we pronounce words and different sounds, and how that sets us apart from other primates and why we evolved. I realized I'd have to go to school for eight more years, and I had no interest in doing that. So I finished what I had to do pretty early.

I moved back to New York and kind of found my way into a bunch of different companies doing different things. I had a small stint at FIT [Fashion Institute of Technology] because I was interested in fashion marketing, but really landed in email marketing for a smaller company and have kind of bounced from there. I found my niche, I guess you could say, in big tech. I've worked for a couple of big tech companies now for the last seven or eight years, but doing what I primarily do today, which is rebuilding CRM systems from the ground up and really creating that best practice set. I find it really interesting on how we grow digital channels in times of transition, and how we take that data from one platform to the next and what that looks like as we have to migrate.

Alan Hart: What does CRM look like at GFiber?

Trish Magnético: Well, that's a very loaded question, because what it looks like today is nothing like what it looked like four years ago when I joined GFiber. As of today, we have, in the last year, migrated onto Salesforce Marketing Cloud. It has now unlocked omnichannel messaging. As of today, we send maybe five to 10 SMS. By the end of this year/early next year, we'll have upwards of 50 or 60, with push notifications on the horizon as well. And when you think about any company today, having a strong digital footprint is so important. And it's really great that GFiber is starting to unlock that potential of how we can connect and engage with customers.

Alan Hart: Yeah. And you've been using—not only in this role, but in the past—you were familiar with Salesforce Marketing Cloud [SFMC] and the ecosystem. Is that right?

Trish Magnético: Yes. I have been a Salesforce or an SFMC native since it was ExactTarget back before 2015. I actually learned my deep coding experience in an AMPscript, actually. My most mortifying story, I was working for a vintage company that primarily focused in different levels of furniture and clothing and design. And we did these deep-layer personalizations. So we could get into, like, you liked a red chair from the 15th century that was velvet. And then we could send you, without using a plug-in, that level of personalization through a file with pictures and links of everything you had browsed on the site. And as you can imagine, those were very heavy files; they had to load in every day to load your affinity personalization. And I missed the code. I copied and pasted. I did the one thing I tell my team not to do all the time. I copied and pasted, and I missed closing the bracket on every single image. And the image sent nine broken images, and it's the same email to about a million people. And I thought I was going to throw

up. It was the worst experience ever. But I learned! What I tell my team today: Check everything. You do not send anything unless it's been proofed several times.

Alan Hart: Yeah, that's a good lesson. Well, you mentioned SMS and push and that you're adding those capabilities. How are you approaching adding those? Because those are very different than email. Different customer expectations and the like.

Trish Magnetico: Different customer expectations, but also different consent laws too. So, it's really touching everything for our system. We have to go back and relook at the way that we do preferences and what those preferences include. And we also have to build out that function for SMS to send address-related information outside of mandatory service announcements.

So when I think about that and when I think about how many touches a customer is getting and where it's the most important, I think something that I spend a lot of time thinking about is leveraging my executive team to make sure that we're getting all of these urgent messages out to the customer when we need to get them because it is their internet. They need to know it's working.

So it's very important that we send the right message at the right time on the right channel. And even though we see it as one signal, it's really not. It's now one signal with three different outputs, and we have to make sure that we're weighing that the right way. So maybe if I have an email in that place right now, I need to scale that back and put in push or add an SMS, or maybe it's a combination. There's a lot of rigorous testing that has to go in to finding that right balance because what we don't want to do is see declines in engagement rates, but also declines or opt-outs on SMS—like, how much is too much. And I think it's going to be a very big learning balance for us of trying to find what works and what doesn't, while also balancing what I know my leadership team really wants to see.

Alan Hart: Yeah. No, balance is the keyword there. Like, tipping your toe into these new channels, pulling the lever slowly to try to figure out what the right level is.

Trish Magnetico: Right. And it's so hard, too, because it's something that's so important to them. We have about 300 trigger campaigns right now. When I think about, out of those campaigns, what is the most important that I really need to have people know? I think about billing and I think about appointment reminders, and making sure that you're prepped for somebody coming into your home. It's important to us, and I want to make sure that they're getting that message across, but I've never had to think about it outside of email. I've always been so highly dependent on my message getting delivered into the right folder, but now it's not just the right folder, it's the right mailbox on your phone. It's do you have our app downloaded? You know, how can I think about app download and app attrition in early life cycle and making sure that before our installer is even at your house, that you have our app downloaded and that you're ready to go, and how hard can I push that?

Alan Hart: Yeah. Well, at the heart of all of this is data, and we talked about building a list from scratch for SMS prospects. How are you thinking about data hygiene and retention as it relates to all your programs?

Trish Magnético: Yeah. So when we think about platform transitions in general, we've had to migrate completely from an internal tool onto Salesforce Marketing Cloud. And there are a lot of protections that were in place by having a reputation that had been established over 10 years. So even in the last year, there's been a lot of battle with inbox deliverability and where we're landing. Everybody wants to land in that, you know, important folder. They don't want to land in promotions, but it's super challenging. And AI inboxes have made that even harder now, too, based on how they're scanning it.

So, one, we've had to completely overhaul our design. We went from being very image heavy to very text heavy and very scannable and link clickable. So that way we can get those little summaries, especially when we think of our "sign-up to connect" flow, and making sure you're seeing your tracking information or your appointment reminder times. But also in terms of our acquisition sentence, too, of, as we move over, we have to make sure that we're not burning an IP—that we are relying on our partners who help us manage our deliverability to say, hey, you're doing too much, or hey, you need to check your spam rates. Because that's been a really big challenge of being able to lift that old machinery that we had in place that ran so well and move. And for revenue, there's real impact to that too. If you see a hit to deliverability and we see our lists aren't coming back as clean because they're now on a new IP, that directly affects our revenue. That's, at the end of the day, overall, what we're all accountable for is revenue. So we put a lot of migration efforts in place around we're only sending, you know, 6,000 emails, for example, a day for one type of send on the platform. And then we check that and we're looking at it very carefully to say, OK, today's spam rate was X; tomorrow, what is it going to be? Do we need to add in more educational sends? Do I need to send an MSA-style email out to maybe balance out some of it? Or how long do I have to wait before I can send that next batch? And there's a lot of rigorous work happening on my team right now to make sure that those email addresses are good. We're not—acquisition is hard, right? You can sign up with any email address. And we do verification, but that doesn't mean somebody can't sneak something through. Or that they don't sign up with a really old email and it's not going anywhere. So we're doing a lot of work to make sure that the email addresses that we have are good, that they're opted in to receive the right messaging that they want, and that they still want to hear addressed news updates about us and when we're going to be available for them, or if we're not available for them. And then we're adjusting strategies and leaning heavily into automation on customers who we know are interested, and just haven't made the move to sign up yet, to make sure we're balancing the right amount of messages over the course of the month. So that way, it's not looking like spam, but we're also doing the most that we can to hit those revenue goals.

Alan Hart: Yeah. Oh, that's amazing. Well, you've done a lot to build a CRM program—a rebuild of the CRM program, in many cases. What lessons have you had going through that process?

Trish Magnético: The biggest lesson, I think, is to never expect it to be an easy process. I think that you can plan as much as possible for how you want things to work and how you want things to go, but you have to go into it with zero expectations. At GFiber, actually, last year, as we were preparing to transition the very first campaigns onto Salesforce Marketing Cloud, we had a batch of 10 that we really wanted to be the first ones. They were going to be ready to go. They were set to launch all of March. We launched two of those 10 campaigns because we went to turn the other ones on, and they were broken. They just didn't work the right way. And then we learned. We were like, OK, well, that was really aggressive for us wanting to launch 10 campaigns in one month. Let's scale back. Let's look at those triggers again. Let's

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see where things are pointing. We got tighter in our process. We learned how to release better. We worked closely with our Eng partners to make sure that everything really made sense, and we migrated. It took a lot longer than we expected, and there were hiccups, but I think we underscored the importance of data and the way that engineering works with marketing teams. It's so important that you have such a strong foundation with them. I couldn't do my job without our engineering team; like, it would not be possible. But sometimes it's hard. Engineering looks at marketing sometimes and doesn't take them seriously. You know, for them, they're like, well, what are you complaining? It's an email. I'm like, well, yes, it's an email, but it's also going out to all of these customers in real time and it has their account information. So you have to be able to make sure that it's correct and that we are sending the right information and telling them the right things. And when it breaks, you have to be able to fix it. And I think that, again, I think data and making sure that things work the right way are very important, but also being able to make sure that you just don't have a plan. Because you never know. You just don't know.

Alan Hart: Right, right. And as you're now scaling to be omnichannel, what are the watch outs or lessons or learnings in that expansion and scale?

Trish Magnético: I think the same thing applies too. We're in the very early stages of putting together our project plan for SMS, which means looking at the campaigns that we want to launch. And, of course, everyone has their hand up. They're like, I want to launch this campaign. This has to be in the MVP scope. And I'm like, OK, I hear you. But we're talking MVP. I don't know if a lot of teams understand the concept of MVP, right? This is not the end state; it's the very first state of, if something were to go wrong, which campaigns can it go wrong with?

Alan Hart: Yeah, right.

Trish Magnético: And also making sure that it's very exciting. Everyone always sees the new shiny thing and they're like, yes, I want it. That's amazing. But we have to do it the right way. We have to be very intentional. SFMC is not... I don't think it's an easy tool. I love the tool. I think what it offers is incredible, and it really allows marketers to fully send to everyone. But it's not built to be simple. It gets very complex. And there's a lot of ways for you to make a mistake or for you to miss a step and not get the result that you want. So, I always ask my team to be very intentional with what they're doing, especially when we're journey building, to think about the impact of that journey. We recently had a conversation with our engineering partners about the impact of that journey building and the right way to build out omnichannel. And that gets lost a lot, too, because we're in such a race to get it done. But the race doesn't mean anything if at the end you don't get what you actually need, right? Like, I want to be able to go in and see my SMS here, my push here, my email here. And I want to drag and drop and move them all around. But if I rush to do that in the quickest way possible, I'm not going to get that. I'm going to get an SMS in its own little journey on the outside, and then everything else is going to be happening at a different ecosystem. And sometimes the quality is better over the speed and the quantity to get to market. And I say that a lot: It's quality over quantity. I'd rather do 10 things really well and iterate than launch 25 or 30 and have half of them be broken.

Alan Hart: I love it. Well, one of the things we like to do on the show is to get to know you a little bit better. We know you've got some competitive kiddos, but my favorite question to ask everyone that

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comes on the show is, has there been an experience of your past that defines or makes up who you are today?

Trish Magnetico: Yeah. So, actually I'm going to talk about my husband. He's going to absolutely hate this. I met my husband for the first time, and we had one conversation and I knew that we were going to get married.

Alan Hart: Oh, wow.

Trish Magnetico: And I feel like people hear that, and they think that's crazy. We've actually been married—we'll be married 10 years this year. So, it's not! It really works. But I think having the power of conversation and taking the time to meet with someone—like, I was going to blow him off; I had no intention. He's like, let's go to a diner. Let's have a cup of coffee. I sat for one cup of coffee and I was like, I don't, this is not for me. Like I wasn't interested. But I took the time to go for a walk with him, and he actually wound up being someone who I thought was really amazing and really cool and was hitting my life at the right time. And I think a lot of times we don't take a moment to have that conversation. We make assumptions, we brush people off, we don't make the time. And that, for me, is very pivotal because I did not take the time and then what unfolded in my life after meeting him and after having our child together and getting married? I'm so glad that I did. And it made me reframe the way I approach the second part of my life with him. Because now I'm very intentional about making those times for conversations and, even with my team—sitting with my team and making sure that they know that I'm here, that I'm supportive of them. And a lot of that stems from that first I wasn't ready to give somebody the time of day for a conversation—and if I hadn't, I would have made a huge mistake.

Alan Hart: That's amazing. That's a great story. And I know you said he's going to hate you talking about this, but I would love this if my wife said the same thing about me!

Trish Magnetico: He'll absolutely hate it. Like, he really hates being the center of attention. Although that Dancing Dads video really has me questioning.

Alan Hart: Yeah, there's a little—

Trish Magnetico: Yeah, I think he does like it, but—

Alan Hart: A little on the surface, yeah.

Trish Magnetico: But, yeah, no. I mean, he's a really cool guy, but he definitely does hate it.

Alan Hart: Well, what advice would you give to yourself if you're starting out in this all over again?

Trish Magnetico: Email's not heart surgery. It's not. I think, and even today, we put a lot of time and pressure on ourselves to get things done. And because we are the first line of communication for customers, they see things that we send them, things go wrong. That everything feels like a fire drill. Everything feels like it's broken. I mean, I have this fight with my boss all the time of whether an issue is a

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P0 or P1. I actually just tried to do it before I came into this recording, and it's not. Not everything is the end of the world, and sometimes an email is just an email. And I can think back to so many different points in my career—whether it was in big tech, I was in music before that, and I was in e-commerce first—where Black Friday was such a big deal to me. And at the end of the day, there's always going to be another sales holiday. There's always going to be another send. People delete half of your emails anyway. You're super lucky if you have a 50% open rate. So if you're worried about the 20% who saw it, they're not going to remember it with all the other things that are in their inbox these days.

Alan Hart: Right. It's your one thing.

Trish Magnetico: It's your one thing.

Alan Hart: It's many things for them.

Trish Magnetico: Yeah, but it's not even on their radar. So before you get hopped up and nervous about it, just let it go. The only person who's really upset with you is yourself.

Alan Hart: I love it. Well, what's something you're trying to learn more about right now?

Trish Magnetico: So, my kids have taken up this side business. I feel like I'm talking about my kids a lot. But on the concept of them being competitive, they actually just launched their own keychain and jewelry business.

Alan Hart: Oh, wow.

Trish Magnetico: They're very entrepreneurial. They've signed up for their first craft fair. So they have me learning all of these different little pony bead creations and then teaching them. Because, of course, they don't want to actually watch the YouTube videos. They want me to do it for them. So I'd like to say I've become a specialist in pony bead keychains. I made the alien from *Monsters, Inc.* for my daughter the other day. I have no idea how I did it. I don't think I could do it again. But yeah, if you want a Pocahontas or, you know, Elsa from *Frozen*, let me know and I'll send you one!

Alan Hart: That's amazing. That's a skill that could take you places.

Trish Magnetico: Right? But I'm also very proud that they are like, we want to make our own money. Mostly because I call my oldest my "broke bestie" because she's like, I want to go to all of these places and spend your money. And I'm like, well, you can spend your own money actually.

Alan Hart: I love it. Well, as you look out in the world today, what are you curious about?

Trish Magnetico: I mean, I think I'm curious in where we go next in terms of marketing. It feels like we keep hitting this peak of digital transformation, and then something else comes and disrupts it. So, right now, AI—we're in a conference that's primarily about AI. But what comes after AI? There's only so much refinement, and I feel like in the last 10 years, the industry has gone from very promotional and we've

kind of shifted back to this informational space of what is the most important need-to-know? And I like to think about that a lot, in addition to this trend of people going back to analog—of reading newspapers, getting mail, things like that. We're a primarily digital team. I work for a digital company. I work for an internet company. I'm always interested in kind of trying to plug in more to see what that means for us and what that means for us in terms of trends, and if that would move the needle for us revenue-wise or, you know, educational-wise, if we were to fall back a little bit or to change things. I never thought I would be telling my team, run your subject lines through AI and see what lands better in the inbox. But that's where we are. And it has such a big impact on the way marketers are doing business now.

Alan Hart: Yeah. It's rethinking what it is to be a marketer.

Trish Magnetico: Right.

Alan Hart: Yeah. Well, last question. You're close to the technology, you're close to the practitioners, you are a practitioner doing this. What do you feel like is the biggest, missed opportunity marketers are seeing right now?

Trish Magnetico: I think we're not spending enough time in the results and in the data. I think we're not listening to all of our sources. We're not listening to what the customers are telling us. We're not looking at the trends of what those customers are telling us. You know, I think, again, it goes back to this concept of quantity over quality, of looking to see how much we can get out, because at the end of the day, money is a driver. But for me and my team, because primarily for the last four years, I've sat on the side of the house where it was post-sign-ups. So I already have the customers. Now I'm just focused on keeping them. I personally spend a lot of time in those customer responses, seeing how many responses I get. My team on any day is looking for problems, trying to poke holes in things. I think it's one of my direct report's worst nightmares when I open up my computer and I look, I'm like, oh, this doesn't look right. Can you take a look at this customer and go into this individual account and make sure their experience makes sense? But it's made such a big difference. I'll give you an example.

So there is a process at GFiber where we have to come and install the equipment on the outside of your home before you can have internet service, and that work pre-dates your installation appointment. And depending on what market you're in, it could take eight to 10 business days. If you were a customer six months ago, and signed up, and your house was dubbed as one of those properties, you wouldn't hear from us from the time that you signed up until your appointment, whatnot. But you might see people coming and going on your property. You might see somebody spray painting. That's very invasive, like somebody's on your property. And we were getting a lot of feedback both into the call center and in our reply-tos. Anybody tells you they're not checking their reply-tos, that's a big mistake. You should absolutely check your reply-to. You might not like what they have to say to you, but they really do make a difference. And a lot of it was, why are you on my property? Why are you installing the equipment here? People didn't understand. And in general, in telecoms, it's a pretty normal thing. Telecoms don't tell people a lot of things. But we decided we wanted to. So we started an entire series called Our Sign-up to Connect Installation Non-Ready Unit Series, where we had a series of touchpoints where we're talking to them about, hey, you might see this happen on your property. You're going to see somebody with flags. They're looking for your utilities. Here are the colors the flags might be. If you know where your sprinkler

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heads are, let us know. Flag them for us. We want to hear all those things from you. And if you still have questions, here's a YouTube video where you can go and watch pretty much an animation of what you can expect between when we first sign you up to when the work is done on your property and we're ready to install you. And it made a really big difference in our connect rates of having those customers successfully install the internet because they understood why somebody was on their property, or when they were calling in with questions. They were calling in with educated questions of, OK, well, I didn't want my box placed here because nobody knew what the box was. Well, I didn't want it placed here. Can I move it to this location? Or, oh, you were here today. I'm so excited to see you. I saw them on my property. Of course it opens the door for other feedback, which is not always great. But in general, you know, was it necessary to add another email? Probably not. But did it make the right customer experience? Yes. And I wouldn't have known that if we hadn't paid attention to the data.

Alan Hart: Yeah. That's a great example. Well that's my last question. So Trish, thank you for being on the show today.

Trish Magnetico: Thank you so much for having me. Absolutely.

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