Sanjit @ Samsara: [00:00:00] I think product market fit is something you don't wanna force.

when they call someone out into their office or in from the hallway and say, Hey, so-and-so you need to see this, right?

That's when you know you have something that's a true solution to a big problem

companies pay to have their problem solved. And so when we talk about things like revenue and revenue growth, for me it's actually impact and problem solving growth.

Scarlett 2i2 USB: Welcome to 20 VC with me, Harry Stebbings and stay. We feature the most incredible company. Accompany that in just eight years has scaled to $1 billion in ARR, a public company and tens of thousands of customers. This is Samsara and joined today by Sam SARS, CEO and founder, Sandra Biswas before Samsara Sandra was the CEO and co-founder of Mikey. One of the most successful networking companies of the past decade. Sandra grew Marquis from his PhD research into a complete enterprise networking portfolio and their sales doubled every year from inception.

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Harry Stebbings: Sanjit, I have just heard the most wonderful things from the one and only Doug Leoni. I've spoken to many others. So first, thank you so much for joining me today. Well,

Sanjit @ Samsara: thanks for having me, Harry. Not

Harry Stebbings: at all. But I wanna start with a bit of a weird one, but one of your friends and colleagues told me that I had to start with your first tech project, taking your school online.

So what did that teach you about technology and about

Sanjit @ Samsara: people? Yeah, it's funny, it's the kind of way back machine test, so that's probably a a 30-year-old. Story At this point, we're talking like the early, mid nineties and the project that I had was to try to bring my high school online, and this is like right at the beginning of the web browser, so I'm kind of dating myself here, but probably before you were born.

But the worldwide web was brand new [00:04:00] and I thought it'd be cool to bring 1600 high school kids online and kind of see what happens. And I was a techie and so I'd been kind of online even at a young age and wanted to find a way to make it accessible.

Back then it was very kind of elaborate to get online, you needed to download a bunch of software, FTP and all kinds of crazy stuff. And I thought, you know, the typical student isn't gonna figure that out. How do we make it just work out of the box? So, sat there typed in 1600 names from the high school yearbook 'cause I couldn't get the roster from the administration.

So. Just kind of brute forced it. We set up web browsers and web servers so you could actually check your email using the web instead of having to sit at a command line, which is kinda how things worked back then. We brought our high school newspaper online, so it was really a kind of fun time and everyone got into it.

And by the way, I was a new student and I've just moved from Texas. probably what my friends didn't tell you is I was scrawny. I was like a 12-year-old freshman, by the way. So I'd skipped a grade or two along the way. Just moved from a, you know, a different state, which is practically a different country.

And it was a great way to meet people. So I got to meet everyone in the [00:05:00] school quite literally from, you know, the high school football team captain to like the newspaper editor really fun experience taught me a lot about how diverse people are. Like lots of different things that they wanted to do online, things that they were curious about, but also how fun technology can be.

'cause it like really blew people's minds. Like this is like you're going from disconnected. Like there's no smartphones. There's no internet to, oh my God, like look at all this stuff online.

Harry Stebbings: you know, you mentioned there about brute force, people's names in, you know, I know Paul Graham has talked before with regards to you about doing things that don't scale.

Can you talk to me about that and how you think about doing things that don't scale today, whether it's always held true for you and how you think about it today?

Sanjit @ Samsara: in, in retrospect, that project was a bit like a startup, right? Like we were trying to do something. We had very scarce resources.

We had no money. It was just like spare parts in, in the computer lab kind of thing. and the brute force was one of the ingredients to that, which is like, privacy questions like, are we allowed to? Give this kid a list of names from the roster kind of thing. So I said, well, the yearbook's not private. I'll just use [00:06:00] that. So it was just finding a way, I guess this actually happened over and over If, if we kind of fast forward, the first research project that my co-founder John and I worked on at MIT was called Roof net.

We built the network by literally installing antennas on people's roofs we got like a 40 foot ladder. And like, again, in retrospect, that was kind of crazy and definitely wasn't research, but it was just what was needed to build the platform up. So over and over it's been an unlock just being willing.

To kind of roll up your sleeves and, and go for it. Do you find

Harry Stebbings: it hard when you suddenly have to transition to scale though? It's like the transition from founder led sales to sales led sales, suddenly you can't do the antennas anymore. What do you do

then?

Sanjit @ Samsara: You're absolutely right, and at some point you need to stop because you're kind of getting in the way.

You're slowing things down. In other words. So the hardest thing is giving something up that you love doing. Like I actually loved installing antennas in grad school, and I loved doing many of the early sales at Meraki and Samsara because, and I, and I still love spending time with customers, but again, sort of making it a scalable process is the key unlock at the next stage, which is how do you 10 x and then 10 x [00:07:00] again.

So

Harry Stebbings: how do you embrace that transition? Because it's incredibly hard to let go or to realize that actually we can't do that unscalable thing and we need to build process. what would you advise

Sanjit @ Samsara: me? So I go through a process which I called rehiring myself, and it's a little bit like I actually write a job description of what do I think the job needs in the next year or the next couple of years.

And I check like, does my time and sort of how I'm doing things match what the company needs for me and the organization needs for me.

The other thing is people will tell you if you listen, right? They're very polite about it, but they might kind of give you a hint or two. And so you have to have these really big ears and listen.

Harry Stebbings: in terms of like the reinvention and moving with the company, if we were to take the current job description that you have today, what's the current job description and what do you expect of yourself in this role?

Sanjit @ Samsara: Well, at this point, Samsara, the consensus numbers have us getting to over a billion in, in a RR. And so the current job description, in my opinion, is to be building the company, not for today's scale, but actually [00:08:00] for scale three to five years from now.

Which is more products, obviously more customers, just a lot more building. And what you realize when you work backwards from that is the way that I spend my time, it's still important to spend time with customers, for example, because you have to have that true north, the Compass needle, the intuition for what the customers need.

But I can't be in every product review, I can't be in every sales pipeline review. It just, it wouldn't make sense. So that's the kind of thing where I will actually say, you know, this year I'm going to drop the sitting in every QBR. Right? A quarterly business review. And that's okay because I feel like our team's got it.

But I do need to spend time helping write the five year. Product roadmap because I have a deep sense for where I think this all needs to go.

Harry Stebbings: And we are gonna get into customer visits. I've heard that you take photos, write-ups, we we're gonna get into it. I do have to ask in terms of like the changing nature of the role of CEO, what was the hardest stage or transition to adjust

to?

Sanjit @ Samsara: There have been quite a few along the way. You mentioned Doug Leone, who is, uh, our partner from Sequoia Capital [00:09:00] in Meraki, which is a company before this. That was incredibly challenging to become the CEO of a startup company. And I didn't start out wanting to be a CEO, I was a graduate student along with my co-founder John at MIT.

We were academic researchers, we wanted to go be professors at some point. So that initial transition from project to startup to actually raising venture money and that was a big transition because I'd never managed anyone before.

I never went to like a management training course, had no idea what I was doing. So it was a lot of trial and error and a lot of listening to make sure that what I was doing was useful to people because otherwise, again, like I'm kind of getting in the way, I'm not helping.

Harry Stebbings: Did you feel like in a bit of an imposter, in that

Sanjit @ Samsara: situation? you have that even as a grad student when you're doing research, like how am I gonna further the state of the art? So you kind of get used to this idea of being uncomfortable, but it's very different because there's a shelf of business books. You go to a bookstore and there's like all of these management books and so on.

You read through a couple of 'em, they're actually kind of hard to relate to. And I ended up just kind of putting them all down at, at the beginning and saying, look, I. This is actually just a big project, [00:10:00] right? So let me do what I know how to do, which is lead a project and kind of get it to the next stage.

And that's where some of these kind of operating principles of kind of working backwards from winning essentially. Like what, what does the next stage goal look like? And then let's reverse engineer that. That's where that came from.

Harry Stebbings: You mentioned Meraki in those early days. I'm really fascinated, I love backing second time founders 'cause I honestly think that we make many mistakes the first time that we wouldn't repeat a second or third time.

When you look back at Meraki and translating that to Samsara today, first, what didn't work with Meraki, that you have very deliberately left behind and not taken with you to

Sanjit @ Samsara: samsara. Like you said, we make a ton of mistakes. We try a ton of things. Let, let me give you maybe two examples. The first is when we started Meraki it, it was more of a technology first company.

Like we had a cool technology, which we were kind of bringing with us from MIT conceptually. Like we had a new idea how people could build very large networks. We thought that might be useful for community wifi, like free wifi in the town square kind of thing, [00:11:00] which in the mid two thousands was an exciting idea.

I think Google and a bunch of others were announcing projects like that. Now, the problem with free wifi is there's no business model attached to it, and at the time, wifi was still quite expensive. Like bandwidth was expensive, the hardware was expensive. And I do remember at Sequoia, like a bunch of the partners were like.

What's the business? And I would just explain the technology and they said, well, that's not a business. Right? And I think we've kind of figured out the hardware. The funny part though was our not a business business actually doubled in rep. We bootstrapped the company the first year, which I can talk about.

We didn't actually have venture money. We managed to sell enough product to get off the ground. So that was a feedback loop. We're like, well, people seem to like what we're doing. They want to pay for it. And then revenue doubled and doubled. It was during the global financial crisis that we realized, whoa.

You know, you actually need to have a clear ROI and a value proposition, like the fundamentals matter. And so that transition was actually very challenging and something we did differently at Samsara, we all, we started market first with this company. We said, who's the customer? What are the problems we can solve in a kind of scalable way?[00:12:00]

And let's work backwards from that, which is to find a commonality. So that was maybe a big one. Why did you

Harry Stebbings: decide to raise vanishing money, meet bootstrapped, you doubled your revenue product was selling, customers liked it. Why raise?

Sanjit @ Samsara: So we got to close to a million dollars in revenue. And by the way, with Meraki there was a hardware component, so we were building these routers and what that means is you need cash upfront to get the, the product manufactured.

And so that was a big challenge, which is essentially having working capital for that. The other piece was we were bootstrapped, but we were kind of, I guess Ramen profitable would be like the YC or Paul Graham phase. And we had all been graduate students, so we were used to like living below the poverty line.

That was all good with us. We, we just enjoyed the work. When you went and tried to hire people, you realize they needed to make a lot more than a graduate student did. Right. So we realized, okay, while we're profitable, it's not gonna really be scalable unless we, we get a little bit of additional money.

Now we could have taken a bit longer and just gone with taking our time, but actually the venture capitalists started knocking on our door. Quite literally. They found our dingy [00:13:00] office space, which is like, I think a sublease of a sublease in the warehouse district. people with very nice cars would pull up and quite literally knock on the door 'cause word spread that like this group of MIT students was out there building routers and doing some interesting things.

Harry Stebbings: VCs have a way of finding you if you are good. I find we, we had no

Sanjit @ Samsara: idea. We like, we're not listed anywhere. the fact that they found us, like it's really some pretty impressive detective work.

Harry Stebbings: What's the second one that you deliberately left behind?

Sanjit @ Samsara: So I talked about being market first versus technology first. There have been a couple of times where. Even in the course of this company, you tend to get really enamored with a cool idea or cool technology. So for us it was like AI and computer vision.

A couple of years ago we thought it was gonna be transformative and it has been for our business, but we found ourselves in this kind of techie engineering habit of we've got this cool new hammer or tool, this is like 20 18, 20 19. Where can we apply it? And so for Samsara, we, we serve the world of physical operations, think the supply chains and the factories and and so on.

So we thought [00:14:00] maybe we could build a camera that would inspect products on an assembly line. We called it machine vision That turned out not to be a great business for us. Not because the technology didn't work, but it actually didn't fit our business model.

Like the way that it gets installed online is highly custom, lots of custom lighting. You need to know the product and so on. So what we found with Samsara is it's really important to have a. rinse and repeat recipe, something that's truly plug and play that was not plug and play. So that was a mistake that we made at Meraki as well.

We built some exotic networking products that didn't quite get off the ground, and you would've thought we would've learned the lesson, and we kind of did. But you find yourself reverting to those kinds of problems even if you're aware that I shouldn't make the same mistake twice, you find yourself doing it because it's a natural tendency that some of us have.

Harry Stebbings: When I listen to both, I just think about kind of product market fit quite early, both in Samsara and in Meraki.

Mm-Hmm. If you were advising an early stage founder on that very difficult and lonely process from zero to one in search for product market fit, having done it twice so [00:15:00] well, what would you say to them over a coffee or sitting by a fire?

Sanjit @ Samsara: Well, I think product market fit is something you don't wanna force.

And the way that I, I've always kind of gone about it is just to get out there with customers, with beta testers and listen for the wow, Where you're showing them something. what we've done in the past is kind of what we call an allergy test. So we'll bring them a few different ideas that we're playing with and sometimes they'll kind of nod their head or they'll be very polite and, and that sort of thing.

But then you show them something that's truly useful to them and they will quite literally stop you right there and say like, Hey, can you click on that? Like, show me that again. even better is when they call someone out into their office or in from the hallway and say, Hey, so-and-so you need to see this, right?

That's when you know you have something that's a true solution to a big problem It's probably the beginnings, right? It's not robust enough to be a full on product, but you listen for that feedback loop and then you double down there.

That has worked for us across both companies and, and many, many products that we've built.

Harry Stebbings: Do you agree that if they're not paying for it, it's not important?

Sanjit @ Samsara: I think so, and this is something I've learned in the world of B2B, which is companies [00:16:00] pay to have their problem solved. And so when we talk about things like revenue and revenue growth, for me it's actually impact and problem solving growth.

That means that we are solving a lot of problems for a lot of customers and that I think is an important connection. It's not just dollars or revenue for revenue's sake. It's actually impact and that's why people are paying money.

Harry Stebbings: what do you think are the biggest mistakes founders make with product market fit?

I often find that they set kind of arbitrary metrics to suggest they have product market fit number of users. For instance, it doesn't say anything about retention or churn or usage or anything in between. Yeah. What do you see as mistakes that people make with product market fit?

Sanjit @ Samsara: Well, I think some of it has to do with the fundraising process, and you see probably a lot more of this as a VC than than I do, but it's because people want to go to investors and show I've achieved product market fit.

Now imagine that you didn't have to tell anybody about it, you just had to feel it. Then you, maybe it would be a little more honest with yourself about like. Is this product just getting pulled by the market, right? Like that's what you're looking for. It's almost unmistakable. You'd have to be blind not to see it.

I've [00:17:00] had customers or beta testers call me the next day after going on site and they'll say, Hey, was that thing for sale? Like can we place an order for that?

Harry Stebbings: You said about kind of product being pulled out of hand there. I'm very kind. You said before about listening to the show, I'm the biggest like fan of far of Samsara business and you have amazing breadth to your product line. You have three products, well over a hundred million an hour. How do you know when is the right time to release a second product? Because you're right. I'm a VC and I always say to founders, you've got so much more room to run on your first people. Try and diversify too early. When's the right time and how do you advise me?

Sanjit @ Samsara: Just the Samsara anecdote is fascinating.

So our first product that really kind of got us going was realtime GPS tracking. So think about all the work trucks that are out there as part of different fleets, not just in supply chain businesses, but construction field services, all these different kinds of businesses. What we found even in 2015 is people didn't have realtime visibility of their operations.

So they wanted GPS tracking. They wanted a nice interface. They [00:18:00] wanted reporting and alerts and that sort of thing. So that was our first product. What was interesting is that got our foot in the door and we started talking to these operations users. What quickly happened is they love the GPS tracking product, and then they started asking us, Hey, is there a dash camera that you all recommend that works well with your system?

You hear that five, maybe 10 times. And then, you know, we said, well, if we built a dash camera, would you use it? And they say, oh yeah, absolutely. I prefer that the dash camera was in the same system. So that's how we built our second product, which was basically what's now our safety product. those conversations were happening when product one was maybe 10 million in revenue. So it was really happening very early for us. And so we organically built product line number two because the customers wanted more and, and this idea of a platform became very clear that folks wanted to be in one system.

Harry Stebbings: Does product two have to make Product one

better?

Sanjit @ Samsara: We think of them as independent products. So we have customers that will transact with either one. They could maybe just buy the safety product or just buy telematics. They do make each other better. There's [00:19:00] additional context there. So most of our customers today buy multiple products from us because they're trying to solve a bunch of different problems, but it helps when they fit together.

I will say though, what we learned is concentric circles matter. So if you can be solving a problem for the same customer, it's the same person you're talking to, maybe they have two problems they need to solve. That's way better from a customer conversation perspective, because that single lead that you have can lead to two pretty productive sales conversations.

Harry Stebbings: This How do you know when to listen to customers? Oh, I'd love you to solve this. It may not actually be the right thing to do now. It may not actually be the right thing for the rest of your customer base, and it's only that small segment. How do you know when to listen to them and do the camera and the safety platform?

Or not, and that's not where we're going.

Sanjit @ Samsara: We try to use like an 80 20 rule. So if 80% of our customers would benefit from something, we wanna bring it onto the platform. Now there's a bunch of stuff that we get asked for by customers that are exotic or esoteric.

So there we partner, but if you hear [00:20:00] something like the dash cameras, we heard about apps from our customers, we heard about tracking equipment, those kinds of things. You say, oh, I'm hearing this all over the place and I'm hearing in multiple geographies, multiple market segments, we should build something there.

That's kind of what we tend to do.

Harry Stebbings: In terms of like, we should build something there. It's a really interesting combination of engineering and sales, obviously, in terms of the ability to build and then the ability to distribute. Mm-Hmm. I heard that you became a sales savant. Love that word. Having really not been respectfully.

They said you were like an engineering mastermind and now you're a sales savant, and I think it's a very difficult transition to make. How did you make that transition and what really enabled you to make it so

well?

Sanjit @ Samsara: I do think that there's something deep about founder-led sales, which is you have this amazing advantage of you actually know how the things are built, right? You may not actually be the best or most classically trained salesperson in terms of running a perfect sales process and that kind of thing, but you can be in a meeting and navigate in a very dynamic way, which is, oh, tell me more about [00:21:00] that.

Or is that something that's a big problem or a little problem? Like it's a very sort of interactive conversation, and I actually think that on the other side of the table, the prospect loves that because here they have someone. Who can solve their problem, perhaps solve more problems for them and really wants to partner, That's something that is very rare, that if you're a prospect, you don't get that conversation very often. So I think founder CEOs especially have an advantage there, or When you're speaking to a customer, they know you have the ability to shape the roadmap is not gonna change what you do next quarter, but it's gonna change what happens two to three years from now.

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Harry Stebbings: hope that you spend on average two days a week with customers. you just walk me through how you approach that customer engagement? Because you've also then got the picture. I hear you take pictures. You do write-ups and I loved it, but I haven't heard of pictures and write-ups before. So can you take me to this process as as in depth as possible?

Actually, just so I can understand and so founders

Sanjit @ Samsara: can get it. getting that face time with the customer is so valuable. It's so high bandwidth.

as travel [00:22:00] opened back up, I realized, hey, it's worth it to get out on site. And that's when I started actually bringing others with me.

So we travel in pairs or sometimes a trio and that's really fun because I brought our president who runs all of go to market for us. But I also will bring folks like our chief people officer, who's like, you know, runs hr. He doesn't typically get out in the field, but he has a lot to sort of see with our customers.

And when we talk about. talent brand and why people come to Samsara. It's around real world impact. And so he connected immediately.

I wish we could do more of it two days a week. That's kind of the maximum time allocation that I can devote to something like that because there is a company to run.

Harry Stebbings: Talk to me about pictures and notes. What do you do with them and then how do you distribute them to the rest of the

Sanjit @ Samsara: team? Yeah, it's sort of like Instagram, right? Like a, a picture can be really powerful and describe a lot. And our customers are the world behind the curtain, right? They're the infrastructure of the planet.

So if you think about, we have customers that are, some of the largest chemicals distribution companies in the world are the largest crane rental companies in the world. You don't get to peek [00:23:00] behind the scenes quite so much. So I don't know if you've seen shows like how it's made.

I grew up glued to the TV watching stuff like that. And so I'm always taking pictures behind the scenes and our, our team loves it. They get a lot of context, context and sometimes the engineers will say, Hey, what's that thing over there? Or Can I ask them about how they're tracking pallets or something?

So it leads to more conversations than not. So that's kind of why we do it.

Harry Stebbings: You mentioned some of your clients there and that in, in a lot of cases, I. Real businesses, traditional, amazing producers of hard materials. sales cycles also often said to be much longer Mm-Hmm.

Is that true? And how have you seen sales cycles vary over the life of samsara?

Sanjit @ Samsara: I would say it's pretty typical enterprise sales cycle. So we have a few different teams in the company. Our mid-market teams will close deals within a quarter and that sales cycle's inside of 90 days. Our field or your major account teams might take six months to, to a full year to close a deal, but that's pretty similar to other kinds of enterprise software.

And you think [00:24:00] about quotas and cycles and things like that. And we benchmark pretty well there. So I think that's maybe a misperception you do have to sell. So we have what's called a C try buy motion. So you see the product with the Zoom screen share. You can do a trial. So plug and play and see it in your environment.

And at that point, the ROI becomes very clear and then we work out commercials and negotiate and close. That process is pretty similar to I think, how a lot of software companies do things.

Harry Stebbings: one thing that's astonishing with Samsara is how much more efficient you are as a business.

And, and how that's kind of changed over time. What's driven the efficiency bluntly. When I was looking at, I was looking at these different shots of your efficiency and over the last eight courses has been pretty unparalleled. What's driven the efficiency gains?

Sanjit @ Samsara: Well, I say two things. One is we have a direct sales force so they become more productive the longer they're in seat.

And we've been growing so much as a business, we're adding capacity on a continuous basis. So you need to give them time to ramp. The sales reps are financially inefficient and you know, all of this, right? Like they're still kind of coming up to speed and, and still learning the product, learning the customer [00:25:00] base, building a pipe.

Once they have that, the cruising altitude has always been. Very efficient. And so it's kind of just seeing that through, that's maybe area number one. Area number two is we have developed just a clearer sense of process of what needs to happen next and customers actually wanna move quickly 'cause they don't wanna spend time in the sales process.

They want to kind of get the product and get going. So we've found that aligning more closely with how the customer likes to buy has really unlocked a tailwind of growth. It is nitty

Harry Stebbings: gritty, but what do you find is the ramp time for sales

Sanjit @ Samsara: teams? It varies. So part of it is getting a few of those sales cycles under your belt so we can ramp within a few quarters.

Right. And it varies by, it's not that we hire people that have sold this kind of product before. So typically speaking, people have to understand the industries, the vocabulary and the jargon, that sort of thing. So there's like a bit of just a initial period and then you just have to get in there and try it.

I think we can make enablement even better. But to answer your question, it's a couple of quarters.

Harry Stebbings: When hiring people, would you rather hire someone who's sold to that contract size, that amount dollar [00:26:00] before, or who sold to this industry before? I think a lot of founders struggle between domain expertise and deal size.

Which one do you lean on for the experience that they've had? Where do

Sanjit @ Samsara: you sit on that one? That's a great question. I would say the deal size tends to be where we focus a little bit more. Are you used to transactional selling of a few KACB? It's just. Really move through things really, really fast. Or are you a consultative seller where you sit down with the customer, maybe you go visit them, figure out the kind of business value proposition and come back to them with that.

That takes longer. You could have been selling HR software or CRM, you know, these are all kind of similar conversations 'cause it's business value. But that's a different way of selling than just picking up the phone and, and closing deals really fast.

Harry Stebbings: You also recently announced kind of this massive hiring spree that will be taking place in terms of sales. Mm-Hmm. Can you just walk me through this? 'cause when I saw it I was like. Wow, shit like, I mean, fantastic and like, what a nice surprise compared to the doom and gloom that we see. But I think you and Salesforce both on the [00:27:00] same day announced like, we're gonna be aggressively

Sanjit @ Samsara: hiring.

You know, as I mentioned earlier, we're a direct sales company primarily. So for us to be in front of more customers, we need more people on the sales team and the recipe's working. So we're continuously adding capacity. I wouldn't say it was a moment in time where we said like, let's press the button and, and hire a bunch of salespeople.

It's been a continuous build for us, and it will continue to be

I

Harry Stebbings: have a slightly contentious topic, but I'm intrigued to your thoughts. You have a flexible slash hybrid workforce. Why? I have a belief that I don't think any function is better hybrid or flexible.

every single one is better in person. what am I missing?

Sanjit @ Samsara: first of all, I think it's hard to find a one size fits all policy. As a small startup, we benefited tremendously from being literally in the same room together because you just overhear conversation. So the cycle time is super fast.

The difference that we saw when we went to flex work in the pandemic was access to talent. So we were about. Thousand-ish employees, maybe a little bit more. And we're in the Bay Area. That's where our [00:28:00] headquarters is. And so there's quite a lot of tech talent, sales talent out here. But what was interesting is a lot of our salespeople were moving, they're moving to San Diego or Austin, Texas, Then we said, well, if we've got teams out there and we didn't know how long this remote work thing was gonna last, we said, let's do an experiment and hire people from this kind of broader talent, tam. And what was fascinating is I would say our talent quality went up, right? Because now we were able to find that fantastic salesperson who, you know, wanted to live in Austin, right?

Who didn't wanna live in San Francisco for a variety of reasons. They also happen to be time zone aligned with our customers who are spread all over, and not just in the US but Mexico, Canada, et cetera. So we were able to get closer to the customer. We were able to increase our talent, tam like so access to many, many more pools of talent.

And I'm talking about 10, 20, 30 x increase. Not like a 20%, but like a 10 x kind of thing. you don't wanna be talent Tam Limited. We're a couple of thousand people now. We'd probably start lowering our talent bar if you're trying to hire such a big direct sales force in one location.

Harry Stebbings: what have been the biggest [00:29:00] hiring mistakes you've made? Sanji,

Sanjit @ Samsara: The ones that come to mind are when it wasn't a stage fit.

for example, there may be someone who's been very successful at a bigger company. Maybe they grew a business from x hundred millions to to y billions, right? If you're an early stage startup, it doesn't make sense to bring that person in quite yet. Or you could, but you're taking real risk, right?

Because that person's not gonna have all the infrastructure they're used to. They're not gonna have the brand behind them. They won't have a huge number of reference customers. Those sorts of things happen over time because you get wowed, you're like, oh my gosh, this person is so amazing on paper, but are they appropriate for this stage?

So that's one. And then two is. Sometimes I would say when we've moved really fast on hire and not done the references, it can backfire on you because someone again may look great on paper and then you realize, wow, they're really a terror to work with behind the scenes. Like they're not cooperative.

You want people that work well in a team, and that's something you find out via references because the individual's achievements are what's on the resume, not the sort of credit [00:30:00] history, I guess, of how they operate in a organization.

Harry Stebbings: if you think about raw smarts, you think about hard work and ambition and you think about like culture and like good person, would you rank the

Sanjit @ Samsara: three of them? I. you want hardworking people that work well in a team.

So those two, maybe number two and number three, I rank very highly. And then smarts. I think again, it's not about book smarts or IQ test or something like that. It's a little bit more street smarts, right? If you're in front of a customer, are you listening to them? Are you solving their problem or are you just pitching the product?

Harry Stebbings: Right? And that, that's what I mean by smart. So I think we look for people that are kind of, well-rounded in that regard, but you wanna make sure that they've got that drive, that ambition, the grit, the motor, whatever you want to call it. Are you ever okay not to hire a team player? I'm not a team player, that's why I completely unemployable. But I am good at what I do and I am, yeah. Unhinged in many ways. Yeah. Like, I would be a good hire if you unleash me on my own in a dark room. Is there ever a time, is there ever a time [00:31:00] to hire not a team player or a role where it's okay

Sanjit @ Samsara: it's also about talent fit, right?

Now, I will say we have some people who are extraordinary technical architects and they would say, I'm not a people manager. I'm not a big people person. I don't like big meetings. And that's totally fine. We, we don't want a lot of big meetings anyway.

So there what we say is, Hey, I. You help build the next product, right? And then we will bring in product managers and we'll have engineering managers and so on that will help get the thing made. But we need someone to architect it.

You know, there are some personality types and some roles where it is a little bit more of kind of individual brilliance but it it, you want those people to have the ability to work with the other people in the company.

Right. Otherwise, it, it really isn't gonna be productive.

Harry Stebbings: Do you agree that the best CEOs are the best resource allocators?

Sanjit @ Samsara: the CEO is the chief capital allocator of the company, and that's essentially where the company's spending its time, it's where the people time is going and you're paying their salaries.

So that tends to be for a software company where most of the, the money is spent. We have always kind of had a capital [00:32:00] allocation strategy. I'm happy to talk more about it, but I think somebody has to make that call and be the editor in chief.

Harry Stebbings: Talk to me about the capital allocation strategy. I have questions, but I want to hear this.

Sanjit @ Samsara: You know, we were talking earlier about what are some of the differences between Meraki and Samsara. With Meraki, we were kind of glad to see another year, this was a company that survived the global financial crisis. Like we didn't raise a lot of venture capital because the, the markets got tight and so on.

some ways we didn't build for the long term 'cause we were just, again, trying to get to the next revenue milestone. Like, how do we double, how do we double again, kind of thing. With Samsara, we said if we do this right, we will scale 10 x and then 10 x again and 10 x after that.

So we need to be building for the long term, which means you're allocating capital for the long term. That means allocating, engineering budget, for example, to scale the products that are already in the market, but also planting seeds for stuff you're gonna ship one to three years and then three plus years out.

So we have a kind of 70 20 10 capital allocation strategy when it comes to r and d. That's worked really well for us. We've basically built our products organically by having money set [00:33:00] aside to invest in teams to go build those next products and try things. Uh, over time. What

Harry Stebbings: do you think was the best capital allocation decision you made?

Sanjit @ Samsara: Maybe I'll answer the question in a little bit of a meta way, which is, I'm glad we took risk, period. Right. So we were talking about multiple products earlier and how we went from GPS tracking to safety cameras.

That was, again, early in the company's trajectory. We were doing 10 or maybe 15 million in a RR. A lot of people might've said, just stay focused. You know, there's still bugs in the product. There's still new feature asks, like, just allocate all the capital there. We said, Hey, we are gonna fix those and we're gonna invest, but we're also gonna try this new thing.

It didn't cost us a tremendous amount of money to build that first prototype of the product and then V one and V two, but it took time and you needed to plant those seeds so you could harvest them years out. So I'm glad we did that.

it's really important to again, have a sort of ladder of risk where you're saying, Hey, this is low risk, but we're gonna try a couple of high risk, high reward things as well.

Harry Stebbings: When you say that it didn't make a ton of sense, no offense, why do them then?

Sanjit @ Samsara: Because if you build [00:34:00] for the long term, you're gonna be glad you did them three years out, right? So products two and three, I'm super glad we have them now, like product two. For us, safety is now our number, number one revenue product.

very glad we did that.

And along the way we tried a couple of other products, uh, you know, products 3, 4, 5. They maybe won't have the same trajectory, but you won't know until you try.

Harry Stebbings: what risks did you not take that you wish you had taken?

Sanjit @ Samsara: We took a lot of risks, so I, I wouldn't say there's this list of things that I wish we tried and this company grew very, very fast.

So Samsara is about an 8-year-old business. You can see the numbers were public, so it's grown very fast. So we took quite a lot of risk and it's paid off well. would say the intensity was something that we only were able to pull off 'cause it was a second time through company. 'cause I think this, the ship would've blown apart had our team not been through it before.

Harry Stebbings: do you think you were able to move at that speed because of the prior experience and because you had the

Sanjit @ Samsara: confidence of the prior experience? I absolutely think so because for us it was a pattern matching sort of thing of like I mentioned, product market fit. We weren't questioning it, we just knew what it felt like.[00:35:00]

And then when it came time to build a sales team to start scaling up, we had people that we'd also worked with that we enjoyed working with that came and joined us again and that enabled us to move so, so fast. So I think the pattern matching, but also the people matching where we had kind of role fits for them.

Is

Harry Stebbings: there anything about being a second time or serial founder makes you worse? Maybe you are more jaded. You're more cynical. I'm just trying to disprove. I always trying to do the, is it the steel mantles draw mantle or whatever the thesis is, I'm trying to prove my own theory wrong that like investing in serial founders is like the best strategy.

Sanjit @ Samsara: Well, I think you actually get an interesting selection bias of people who opt into it again. So, you know, I think there are many founders who will say, having been through it once, I probably wouldn't get back on the rollercoaster. Like one ride was enough for us. We literally opted into it a second time as we began Samsara, and that's what the name Samsara means.

It's the cycle of reincarnation and rebirth. So we very much said, okay, we're gonna do this. So there probably are a bunch of second time founders who are maybe reluctant or [00:36:00] unsure or want to do it in a sort of lighthearted way. We were fully committed to this business. So if you can find founders like that, I think it's really powerful.

That being said, there are a lot of first time founders who are phenomenal. Jensen from Nvidia, I think that's his first startup. that's the sort of thing where you'd also don't want to sort of filter out first timers, because some first timers just go and go and go.

Toby, you mentioned there, there's a long, long list, right? So you wouldn't wanna miss a Mark Zuckerberg or a Toby or a Jensen.

Harry Stebbings: What's the worst capital allocation decision you've made on the flip

Sanjit @ Samsara: side? I mentioned some of these products that we've tried out. Sometimes you again become really deeply enamored with the product or the technology.

You really want it to work, you really wanna believe in it. Machine vision, which was that product line I mentioned earlier, there were signs probably a quarter or two into it that it wasn't gonna be scalable because of the manual installation required for it. I think we were like, okay, let's see if we can just like power past those, right?

at some point you need to call it and reallocate. We should have made that call a little bit earlier, but it was single digit millions. It's not like the huge downside.

Harry Stebbings: How [00:37:00] fast do you know when it's not working on a product and on people? The two vectors,

Sanjit @ Samsara: on people. That's way more challenging because you have to really be honest with yourself.

You know, the keeper test essentially, which is if someone was leaving, would you try to find a way to convince them to stay or would you sort of be like, I'm kind of glad that, that they're moving on. applied that test. I've seen that elsewhere in the organization where someone's really not a fit and it doesn't mean they're bad at their job or they're worthless or something.

It's just not a fit for the org. You have to call it. And sometimes the person is with you or they're already there. They're feeling it that this wasn't a fit and they're looking for a way out. So it's again, a very practical reality when you have thousands of people, that's gonna happen.

Harry Stebbings: Can I ask on Meraki, when you sell for, you know, 1,000,000,002, reportedly, or or not reportedly, whatever one it was bluntly, your financial profile changes.

How do you think about your relationship to money today?

Sanjit @ Samsara: You're right, your financial profile absolutely changes as you get to the point where you have a family and you know, you're trying to think about a house and all that kind of stuff, it [00:38:00] helps to have money. It helps not to be worrying about it because then you can focus on where you have the most impact.

The liquidity from that sale took care of all of that, right? Like, I love books, by the way. I remember the biggest thing for me was not stressing about buying a hardcover book. ' And it's just fun. Like to be able to not think about buying $25 books, like it's pretty cool.

for everyone, it's a little bit different. I didn't grow up from a very affluent background. My parents were very much middle class. So I think the values are there and once you have the money, and if you keep those values intact, it's a huge weight off your shoulders, right? Which is kind of obvious, but you don't realize until many years later where it's like, I'm just not worrying about that.

Right? I'm not worried about my kids or any of that kind of stuff, which means I have more bandwidth to either build companies or spend time with my kids or do things that are more meaningful than worrying about the salary and the financial side. Now, just to kind of elaborate on that, as you do a second company, you actually have a lot more flexibility in terms of.

We didn't raise seed funding for Samsara because John, who's my co-founder and I both did very well. From Meraki, we were [00:39:00] able to be that seed check. So again, we were able to move so much faster 'cause we didn't have to go fundraise. Now fundraising can be valuable for feedback and so we'd get feedback, but we didn't have to go around saying, Hey, do you wanna invest in the company?

Is

Harry Stebbings: money a score? How do you actually view it?

Sanjit @ Samsara: Let me actually talk about in the company sense first, because we were talking about capital allocation and something that's really interesting that people sometimes lose sight of is companies reinvest their sales, right?

It, it makes intuitive sense, like you get revenue, it has a gross margin. You can like reinvest that back in the company. I don't know the numbers exactly for Samsara, but it's in the billions in terms of what we've reinvested in the business so far. That is mind blowing in terms of our ability to build right? And you see this with some of the biggest, best companies that are out there, whether it's Amazon or Microsoft, you, you look at them over long periods of time. Think about how much capital has been reinvested into an Apple or an Amazon or, or any of these huge companies.

It's absolutely mind blowing. So money is important for that reason, which is, it makes it a sustainable model, And then you can do more. You can [00:40:00] make more betts, you can build more products, that sort of thing. That's the core of why I think money is important. The side effects of that, if you're an equity owner in the company, you share in that upside, but it's actually driven off of the business that you're building it.

It's not an end to itself. It's actually a side effect. Does that make sense?

Harry Stebbings: As Sanji, I listen to you now, when does being a CEO become natural? Because now you know, I hear you speak. You're a very natural. Gifted, CEO and I interview many CEOs. You go back to your engineering, no offense, less, CEO, obvious candidate.

When did it feel

Sanjit @ Samsara: natural? I would say it's probably a few years into Meraki. There was a moment where I realized that my salary was allocated under GNA, not r and d. So it's a very in the weeds sort of sort of view. I was like, wow, I guess I'm overhead. But for me, that was actually an important milestone, which is like, this is an important job, right?

The leader of the company. We talked about capital allocation. You're as a founder, CEO, you're the sole of the company as well. So I think those kinds of things make it feel [00:41:00] natural over time, which is, hey, this is the job, right? It's not being an engineer, it's not being the chief salesperson, it's actually being the leader of the whole business.

And so that probably for me happened maybe as Meraki became a hundred people or something like that.

Harry Stebbings: Why do you say you most need to improve as a

Sanjit @ Samsara: leader today? Oh, how much time do we have? we are entering the next phase of growth for Samsara, which is really scale growth, right?

And the way that you continue to achieve scale. You mentioned you've interviewed people like Mark Benioff and others. They've seen tremendous scale, the CEO they are today and the way they operate, it's very different than, you know, early stage startup, CEO. You're getting a lot more leverage. You're thinking a lot more strategically.

You're thinking like 3, 5, 7 years out. So for me, that's where I'm constantly pushing myself of. Hey, as much as I love being in involved in the details, am I spending enough time on the long term? And that's a question of time allocation, which is you really have to carve it out. Final

Harry Stebbings: one, we mentioned like relationships to money.

Personally, you are also a [00:42:00] father, and I've again spoken to something crazy like a hundred multi-billion dollar founder CEOs with children, and 98 said that essentially teaching children to have the same level of hunger and ambition, despite being brought up in a much more affluent family, is one of their hardest and most significant worries.

How do you bring up kids with that same work ethic despite the financial

Sanjit @ Samsara: cushion? Well, first of all, my kids are young. They're all under 10 at this point. So first we spend time, like when I'm in town, I try to be home by dinner and bedtime and all that kind of stuff. I think that interaction is really important.

So it's not an intellectual or academic exercise. It's actually just like hard time. Face-to-face with the kids, and we try to emphasize things like building things that you actually can't bias with money. Even if it's like building a Lego construction. It's something that just takes a little bit of trial and error and effort.

So it's not like you can just, maybe you could find someone to build a Lego for you, but that's really silly. Kids love things like that, right? It's things like writing stories and being inquisitive and that sort of stuff. [00:43:00] Money doesn't pave the way there. So we try to find those kinds of timeless things.

Money makes a lot of things easier, right? Like my kids, you know, we have a nanny at home, so they actually have a lot of FaceTime with people and they're not watching the tv, et cetera. But the stuff that's truly, I think enduring the problem solving ability, creative function, being able to sit down and focus.

Those are things I don't think money buys.

Harry Stebbings: wanna move into a quick fire round. So I say a short statement and you gimme your immediate thoughts.

Does that sound okay? Yeah, it sounds great. Okay, so let's start with what do others not know that you know to be true?

Sanjit @ Samsara: Let me kind of go back to the uh, idea of long-term building. I have seen this now through with two startups. If you can build for the long term, you're so much better off than you are building kind of a year at a time.

Do you think most startups

Harry Stebbings: build for the long

Sanjit @ Samsara: term, maybe not most, first time through startups? Eventually they figure it out like I would say like Facebook is the prime example of it's a first time founder who's done phenomenally well. Now they're absolutely building for the long term, but I think everyone goes through this period of you're trying to stay alive [00:44:00] and kind of put one foot in front of the other.

Harry Stebbings: Who's best placed to win the AI battlefield? Is it startups chasing distribution or is it incumbents chasing innovation and speed of integration of models into existing technology?

Sanjit @ Samsara: Yeah, I've been thinking about this one quite a bit. So I think on the large scale infrastructure side, if you look at who's won the Hyperscaler Wars, right?

Like who, who runs the biggest clouds? It was actually some of the best capitalized companies, right? You've got Amazon and Microsoft and Google, and now Oracle. So in that sense, AI infrastructure, maybe well-suited for companies that can invest billions of dollars ahead of time in building big data centers.

The applications. On the other hand, think that sort of rapid feedback loop and kind of creativity is really well suited to startups. So again, I think AI is gonna be transformative in many ways. And so it maybe isn't an either or it's where do people play in the stack? Frontline

Harry Stebbings: workers will be removed by AI contrarian stimulus.

That's not what I actually believe, but like discussion topic.[00:45:00] How do you feel

Sanjit @ Samsara: about that? I think we're gonna have frontline workers for a very long time because some of these jobs are difficult to automate. If you think about what's going on with ai, a lot of the sort of disruptive impact might be in the back office or the sort of white collar jobs.

Frontline work transformed a hundred, 150 years ago when agriculture got the, the combine harvester and diesel engines started showing up everywhere. What happened is a bunch of jobs transitioned, right? A bunch of jobs that weren't so fulfilling were hard work, were actually quite dangerous. Kind of went away because automation kicked in and cranes showed up and So I actually think that disruption happened. In our great-great-grandparents generation, what we're seeing now is a similar disruption maybe on the white collar side. And I actually think we're gonna come out of this with better jobs that are more fulfilling, which are, again, more creative and more unique to us, and where we get leverage from technology like ai.

Harry Stebbings: Do you agree that AI is the most foundational technology that you've had in your

Sanjit @ Samsara: career? I would say looking pretty big. So I've lived now through the internet wave, which we talked about [00:46:00] earlier, the mobile phone kind of disruption and wireless technology, and now ai. So I feel really fortunate I'm not, I, I'm, you know, in my early forties, so this is still kind of mid-career for me, but this one feels huge.

Harry Stebbings: You can be CEO of any other company for a day. What company would it be? Sangin. I.

Sanjit @ Samsara: That's an interesting one. I would love to live in the shoes of Jensen from Nvidia just for a day, because I think the work they're doing is so incredible.

He's been at it for 30 years, so just understanding how he's laddered his time and his investments. If I could do a day with him, that would be incredible.

Harry Stebbings: Tell me, you've got Doug Leone and Mark Andreessen on your board starting with Doug. What's been the biggest lessons from working with Doug?

Sanjit @ Samsara: So with Doug, I would say it was really about being direct. Doug is a very clear communicator. He is very straightforward, and actually he's just a great guy. Like he was very just straight with you. So I would say that's my biggest takeaway from Doug is just tell people what you're thinking, what you're feeling, and just be straightforward with them.

What about Mark?

Harry Stebbings: What have you learned

Sanjit @ Samsara: from Mark? So Mark is very different personality as I think many people know. What [00:47:00] I learned from Mark has been his information diet. So he is talked about this a little bit, but I think Mark spends time on X or Twitter gets a lot of what's going on in the moment.

And then he reads some really old, old books, right? Like stuff that's maybe out of print and hard to find sort of the timeless sort of thought classics. That barbell of information is really fascinating 'cause we all have a limited amount of bandwidth to take in. And so being able to kind of do the timeless stuff and then what's current is really interesting.

Harry Stebbings: What are you seeing in terms of fastest adoption of EVs and then slowest adoption in terms of countries?

Sanjit @ Samsara: So fastest adoption of EVs would probably be China. Uh, Norway is maybe technically the fastest. I think 80 something percent of all new vehicles sold. There are ev, which is remarkable given the weather.

there've been a lot of government subsidies, lots of initiatives there. China's is pretty far along. I think that's also maybe driven by the government. Again, air quality is a significant issue for them. So EV and the energy transition there. And then slowest has been really in the US and it actually varies by regions of the us.

Some of that is [00:48:00] because our geography is so broad, right? Like we've got lot longer distances here to cover. And the very slowest has actually been heavy vehicles, what are called class eight. So these are the big semi-truck that you see, or HVS that you see in Europe. Those are the hardest to transition and they're starting to happen now because the technology hasn't quite been ready.

What's

Harry Stebbings: been the biggest surprise or something you didn't expect about being public? I.

Sanjit @ Samsara: There's a lot that people tell you about how your time allocation changes because every 90 days you're doing earnings and you're out. Uh, as a public company reporting, what I didn't appreciate is that's maybe five, 10% of my time allocation, but as a CEO, you're already quite busy, right?

Your schedule's packed. So finding an extra 10% you have to pull back on something else or carve out time. So it actually forced me to go find another five, 10% of efficiency in my own calendar. No one told me that I would need to do that, but I found it some way. What

Harry Stebbings: do you know now that you wish you'd known before you had your first

Sanjit @ Samsara: child?

Well, first of all, it's actually, you know, just from a priorities [00:49:00] perspective. When you're on the other side of kids, you just realize, hey, these are people that I'm gonna be with for decades and decades and decades, and I really wanna see how it turns out. So you were, you know, if you think about startups and building for the long term, your kids are like the ultimate startups and it's really what you put into it and the relationship you build and that sort of thing.

So I don't think I understood how special that is and how it's actually different. I have three kids, so each kid is different in their own way, and they're young and you can already see divergence in their personalities and their interests. So anyway, I, I think it's such a special thing. I don't know that I would've been able to explain it to myself eight

Harry Stebbings: years so far.

Where is Samsara and where are you in 10 years? Are you still CEO? Do you still wanna be with the business? Do you want to be third business? How do you think about that?

Sanjit @ Samsara: So I think we've got a lot of runway with Samsara because, you know, the, the world of physical operations that we serve is so broad and vast.

We're talking about 40% of world's, GDP. So there are a lot more problems for us to work on and solve. And what we're doing is kind of building up a platform, like a [00:50:00] system of record where all this data is in there and we can solve even more problems with it. So 10 years from now, I would love for us to have dozen or dozens of applications on the platform.

I think the world's gonna be very different. I think there'll be autonomous vehicles, there may be delivery drones, there'll probably be some robots. There'll be a lot of ai, and I think that's gonna be a really interesting space to be working in, which is like physical operation's gonna be with us forever, right?

It's the infrastructure of the planet. How will that transform as we kind of go through this, this digital journey?

Harry Stebbings: Sanja, listen, I, I told you I've been a big fan of the business from afar for a while. I was super keen to make this one happen. So thank you so much for joining me today.

Sanjit @ Samsara: Awesome. Well thanks for having me, Harry.

Scarlett 2i2 USB-4: $18 billion in market cap, a billion dollars in ARR. In eight years, that is the most incredible story. If you want to see the full episode in video, you can check it out on YouTube by searching for two zero VC. But before we leave you today,

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Does that sound too good to be true? Well, Navan is so confident you'll move to their game changing all in one travel corporate card and expense super app that they'll give you 250 in personal travel credit just for taking a quick demo. navan. com forward slash two zero [00:53:00] VC.

Scarlett 2i2 USB-5: As always, I so appreciate all your support and stay tuned for an incredible episode. This coming Monday with Henry Ward, founder and CEO at Carter.