



NEWS RELEASE

Customers Incorporated Launched by Former META Group Executives

*CRM industry thought leader Liz Roche and sales strategist Jim Roche
create new research and consulting firm devoted to customer-facing
business processes and technologies*

STAMFORD, Conn. — May 2, 2006—Customers Incorporated LLC today announced the launch of its research and consulting services devoted to customer-facing front-office business processes and enabling technologies. Founded by former META Group veterans Liz Roche and Jim Roche, Customers Incorporated will provide highly-focused customer relationship management (CRM) consulting services aimed at enabling clients to improve performance by aligning marketing, sales, and customer service. Having helped pioneer the CRM category while at META, Ms. Roche is a recognized CRM expert and thought leader. With deep experience in sales and sales operations, Mr. Roche is expert in sales process, consulting and training, including the ValueSelling Framework™.

“The research firm mergers and acquisitions over the past few years have left clients with fewer industry research and consulting firm options,” said Liz Roche, managing partner of Customers Incorporated. “Businesses are looking for an alternative to the do-all behemoth firms and there is real need for a highly focused, hands-on approach to CRM. Customers Incorporated will fill that void created by the big research firms by offering services that translate what should be done into ideas that fuel actionable project roadmaps and workplans that net results,” continued Roche.

Ms. Roche and Mr. Roche bring to Customers Incorporated a combined 45-plus years of business experience. As META Group’s lead CRM industry analyst, Ms. Roche developed CRM technology and business models that have become de facto industry standards. Most recently vice president for worldwide sales operations at META, Mr. Roche’s tenure spanned selling in the field to managing various sales functions. “We’re able to deliver nimbleness generally lacking in large research and consulting firms,” noted Mr. Roche, general manager of Customers Incorporated. “My passion for value-based selling, sales effectiveness techniques, and training is much better served through our consultancy. We can look across the entire sales ecosystem and see how it interacts with the extended selling team to identify weak links and opportunities. This approach enables us to facilitate rapid change for our clients as opposed to generating six months of meetings, conference calls and Webex sessions.”

Customer-driven Alignment

An alternative to the traditional research firm business model, Customers Incorporated will focus deeply in the front-office subject area as opposed to working broadly across a number of areas. With its Customer-driven Alignment approach and a short-term, high-impact engagement business model, Customers Incorporated will target both end-user and vendor clients across industries.

Project-based consulting services will focus on:

- **Sales Effectiveness** - sales operations, sales process, sales workflows, sales compensation and territory design and implementation and product, process and systems training
- **CRM Consulting and Support** - marketing, sales and customer service process planning and integration, strategy and business case development, vendor selection and technology advice, workshops and problem-solving strategy days, customer data integration (CDI) strategy and implementation, keynote speaking engagements and road shows
- **Executive Optics** – sales and CRM maturity/capability, readiness and technology assessments, risk vs. reward analysis, comprehensive customer analytics

“I’m delighted both Liz and Jim decided to hang their own shingle and apply their expertise to a CRM service model that can make a real difference for customers,” said David Yockelson, managing director, Berkery, Noyes, Inc. and former research director at META Group. “The depth of experience that Customers Incorporated brings to market is a breath of fresh air in an industry where project failures get almost as much attention as CRM successes.”

About Customers Incorporated

Customers IncorporatedSM LLC is a CRM research and consulting firm dedicated to helping companies improve the performance of sales, marketing, and customer service through better alignment of people, business processes, information, and technologies. Its highly focused, hands-on approach enables clients to compete and win by balancing investments in customer relationships with the equity gained from those relationships. Addressing the needs of enterprise-level organizations to small- and medium-sized businesses, Customers Incorporated’s founders helped pioneer the CRM category. Customers Incorporated is headquartered in Stamford, Connecticut. Visit: <http://www.customersincorporated.com/>.

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Media Contact:

Liz Roche
Customers Incorporated
203.978.1677
liz.roche@customersincorporated.com

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