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Taking a chance

Couple starts company focused on customers

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Sometimes a corporate merger spurs someone to take a chance and make a career change.

That's what Jim and Liz Roche decided to do when Stamford-based Gartner Inc. acquired cross-town rival Meta Group in April 2005.

The Stamford residents, former Meta employees, established Customers Incorporated LLC, a company focusing on how businesses can improve their customer relationship management by aligning marketing, sales and customer service.

Photo by Andrew Sullivan



"We were both offered jobs at Gartner, but we felt it was a good time in our careers to re-evaluate," Liz said. "We took four months off and drove across the country. I wasn't convinced that I wanted to work for ourselves. Jim always thought it would be great to work for ourselves."

As Jim worked temporarily at Gartner helping in the transition, Liz dabbled in consulting work before their trip in July 2005. She felt it was a success, and gave a green light to their plans.

"We pretty much said, 'Let's go for it,' " Jim said.

Upon their return four months later, they seriously started planning their

new partnership, which started in April.

Liz was an early adopter of the customer relationship philosophy while at Meta. As Meta's lead customer relationship management industry analyst, she developed CRM technology and business models that have become industry standards.

She is using that experience to serve clients, many of whom she and her husband have cultivated through years of networking.

"The research firm mergers and acquisitions over the past few years have left clients with fewer industry research and consulting firm options," said Liz, managing partner of the small firm. "Businesses are looking for an alternative to the do-all behemoth firms, and there is real need for highly focused, hands-on approach to CRM."

The Roches, who have a combined 45 years of business experience, are targeting mid-market and global 2000 businesses. Because he had a noncompete clause with Gartner that expired Saturday, Jim was temporarily limited to doing sales training.

Their success has surprised even Jim. The company has already assisted clients involved in high-tech, financial services and manufacturing.

"Our goal is to meet expenses this year. We beat them in April and May but won't in July and August. Those tend to be slow. It picks up in September. By the end of the year, we'll be positive," said Jim, general manager of the family firm.

In his position, Jim said he believes he can take better advantage of his sales experience than with a large company.

"My passion for value-based selling, sales effectiveness techniques and training is much better served through our consultancy," Jim said. "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."

One client is David Yockelson, a former research director at Meta Group and now managing director of investment bank Berkery, Noyes Inc.

"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," Yockelson said. "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."

Scott Santucci, chief executive officer and chief value architect at Blue Print Marketing in Reston, Va., worked with Jim at Meta and contacted him soon after learning through the Meta alumni Web site that he and Liz had started their own business.

"We focus on helping large enterprise sales groups have a better conversation," Santucci said.

Over two months, Jim helped him identify ways to improve sales staff efficiency at Unisys, one of his clients.

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