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C5insight

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The LUCK Principle™ is the Founding Principle of C5 Insight, changing how Organizations Collaborate with Colleagues, Customers, Prospects and Partners

**Technology
Business Intelligence**

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BIO:

Geoff Ables is a Managing Partner of C5 Insight as well as a speaker and author. He has more than 20 years of experience consulting with businesses in collaboration, customer relationship management, enterprise portals, business analytics and content management. His insights have been seen and heard through many international venues, including: BusinessWeek, National Public Radio, USA Today, The International Journal of CRM, EuroForum, and The New Zealand Direct Marketing Journal. He is a co-author of The Microsoft Dynamics CRM 2011 Administration Bible.

About C5 Insight

C5 Insight is unique in the business consulting, professional services and IT industries. We have built our business on a foundation of timeless values. Our mission is to change how organizations collaborate with colleagues, customers, prospects and partners through the application of The LUCK Principle™ to deliver business results in 4 areas:

1. more profitable customer relationships
2. more informed decision makers
3. more productive employees
4. more effective partners

Our consultants have unparalleled experience in the most effective available collaboration solutions and integrates them with the unique processes and systems of each client. At present, our team is primarily working with Microsoft SharePoint, Dynamics CRM and Salesforce.com; and with the HelixPLAN™ collaborative business planning processes. Through our innovative PI-Cubed™ project management approach, we are able to serve enterprises ranging from the Fortune 500, to organizations with fewer than 500 employees.

Founded in 2000, C5 Insight is a growth company with corporate headquarters in Charlotte, NC, USA, and a global network of consulting and solution experts.

**Interview conducted by:
Lynn Fosse, Senior Editor
CEOCFO Magazine**

CEOCFO: Mr. Ables, C5 Insight's tagline is "Listen, Understand, Connect, Know". How does C5 Insight put that into practice?

Mr. Ables: "Listen, Understand, Connect, Know", or The LUCK Principle™ is the founding principle of the company. We have found that technology has given businesses better tools for building customer relationships, but most businesses have mis-managing these tools and are often over-complicating the process of relationship management. As a result, businesses are grasping for ways to boost the velocity and effectiveness of relationship building – whether those are with customers, colleagues or partners. Getting back to the basics of listening to people, understanding their unique needs, connecting with

them in a relevant way and knowing the results helps businesses re-imagine how they can use technology to improve each of these four quadrants of relationship building.

Take an individual sales person as an example. Without the help of any technology, the best sales people start relationships by listening. They carefully listen and ask questions so that they can understand the person they are trying to form a relationship with. By taking the time to build a foundation first, they can then more effectively connect what their organization provides with what the prospect needs in a personalized manner. When they then observe the results, they know if they were effective or not, and can improve how they work with them in the future. When you see someone following The LUCK Principle on an individual basis, it is beautiful to observe how naturally and effectively they work with others to achieve results.

But The LUCK Principle needs a helping hand when you group individuals into employees, customers and partners that all want a seamless way to interact. For even the smallest business, the potential of The LUCK Principle cannot be realized without the help of consistent processes and enabling technologies. They need a way to deliver workplace conversations from one person to the next and retain that in a corporate memory. That's where collaborative systems like customer relationship management (CRM), content management, business analytics and enterprise collaboration portals are required. The larger an organization is, the more of those tools they need, and the more work they need to put into getting

those tools to talk to one another in order to reap the benefits of LUCK.

The harder a company works at making The LUCK Principle a part of their everyday work process, the more "luck" they will have in making their work force more productive and profitable.

CEO CFO: Do you find most companies realize they are missing something, or do you have to educate them?

Mr. Ables: Most companies lack the self-awareness to realize that they have a collaboration problem. They do, however, recognize the symptoms of the problem – faltering sales results, high customer attrition, dissatisfied employees or ineffective partners. Some businesses have realized that referrals between sales teams are non-existing, or that project teams lack the necessary tools to understand issues and share ideas, or that their sales team is getting blindsided with service issues that they should have known about. When a business identifies one of those symptoms, that is a great place for us to make our entrance and help to solve that problem through better customer management processes and supporting technologies.

CEO CFO: When you are called into a company and they tell you their problem, what is your process, what do you look at and how do you decide what they need?

Mr. Ables: It's very simple – we practice what we preach. When working with clients, we follow The LUCK Principle. It's how we run every part of our business.

When we engage with a client we spend a lot of time listening to them. When we have asked our customers why they have continued to choose us for one project after another, what we hear back is that we take the time to gain a deep understanding of how their business works and what issues are specific to them. Our consulting teams invest a significant amount of time asking a lot of questions, running work sessions, going on "ride alongs," and understanding the fabric of the

company. That listening process is absolutely critical to delivering a successful project. We then work to transform what we have heard into a project plan uniquely crafted to meet the client's goals.

Many of our clients find us after working with one of our competitors who has simply sold them software licenses and provided a bit of training. They wake up to find that the project was not only a failure – but it has left them off worse than they were in the first place. Improving how you collaborate means people will have to change how they work and even think about their business – so part of what we deliver is technical and part is the coaching and consulting required to adopt evolutionary changes in their daily work processes.

CEO CFO: How do you change the mindset of people?

Mr. Ables: Some say that corporate change is bottom up and some say it is top down. Our experience is it has

"Listen, Understand, Connect, Know", or The LUCK Principle™ is the founding principle of the company. - Geoff Ables

to be both at once. It is something a company has to be committed to at all levels – particularly when it involves changing the way that you work together – and it cannot be a short-term process. To get an organization to change how they think, we work with them to adopt The LUCK Principle internally – to commit to changing how they work together by listening to each other, understanding their business, connecting that knowledge to their plans and constantly improving by knowing their results. That translates into spending a significant amount of time in training; continuing to listen to those who are having to change their processes so that we can tweak the technology to better enable them; and constantly collecting feedback.

This whole realm of collaborating using technology is new for many business people whether it is a cloud based social collaboration tool, a CRM solution, or Microsoft SharePoint. They will not know what they do not know about until they have been

using it for a while. Then they will have epiphanies about how to revolutionize their part of the business using the new tools. They will need help bringing those ideas forward, making technology simpler and more useful. No matter how good of a job any company does with upfront planning, they have to listen to the people on their team and respond quickly. The people who have to work with the technologies that we support have the best ideas about how the technology can help them – we work with management teams to tap into this rich source of ideas.

At the same time, nothing will break a project faster than managers who are not committed to it. Many managers have an attitude of, "I chose to fund it and I sit in on the planning meetings so that means I am committed." A real commitment from managers means that they are going to jump feet first into the same system that their team is using every day. Here is a great story that happened with one

client we are consulting with. We sat down with two managers and one of them said the cloud solution they were using to collaborate was horrible. The other manager said that they thought it was wonderful and it was really helping them to manage their work processes. When asked how they run their meetings, the first manager said, "I don't even open that system because I do not believe what is in it, I make all of my guys give me reports on Excel and we work through those together." Manager number two said, "When we are in our weekly meeting, I open the system and if someone tells me something that is not in the system, I tell that as far as I am concerned, it did not happen. It only took a few months of that for people to get the message." That was a crystal clear case study of one manager who made the same project an abject failure, while another was able to make it into a smashing success.

CEO CFO: What is the general competitive landscape for C5 and how do you get people to recognize the difference?

Mr. Ables: The market is fiercely competitive. We have been able to differentiate ourselves in three key areas that have translated into ongoing opportunities for us over the past 10 plus years.

Firstly, we find our competitors tend to differentiate themselves into two different areas: smaller firms that focus mostly on technology and are low-priced, and very large firms that focus mostly on large team consulting projects and are very expensive. C5 Insight has built itself into a solid mid-sized player that has the business knowledge to provide outstanding consulting services, and the technology muscle to tackle the most challenging work process problems.

Secondly, we have found that our competitors tend to focus on either cloud solutions or on-premise technology. We've approached the market as an agnostic partner and have worked with numerous clients in the cloud or in their own data centers. We've also helped to migrate clients from a self-contained data center to the cloud and from the cloud to a data center.

Thirdly, most organizations tend to align with a single technology platform. C5 Insight has chosen to align with a diverse range of technologies. For instance, we work with the two leading CRM solutions - Salesforce.com and Dynamics CRM. We also work with business intelligence in SharePoint and LogiXML, and document management in M-Files or SharePoint. We've also selected to work with industry leading data integration firms Informatica and Scribe.

One of our unifying principles is to provide objective guidance to our clients. By choosing to be agnostic about the data center and neutral about technology solutions, we are uniquely qualified to aid our clients in making the right decision for their business. This has led to tremendous growth opportunities because it is increasingly difficult for businesses to find partners that they can trust to give those unbiased recommendations and feedback.

CEO CFO: Would you tell us about C5 Insight's new corporate website?

Mr. Ables: We formed C5 Insight by merging two companies at the beginning of 2010. Both of those individual companies had strong web presences but when we merged the two entities together and gave them a new name, we quickly found ourselves overwhelmed with work and a new website was not a priority. What we wanted to accomplish with our website was more than just hanging out our shingle. Our goal was to communicate not just our services, but also our unique philosophy and approach to the market that is both cutting-edge as well as based on timeless values. You asked about our LUCK Principle because you saw that on the site. You'll also find our PI-Cubed project methodology, our STARS training approach, our timeless values communicated in the SOLVE statement of company values. All of those are different things that are very unique ways that we approach the market, and all of those are geared towards delivering a level of excellence that isn't available anywhere else.

CEO CFO: How has the current economic scenario helped C5?

Mr. Ables: To be honest, it hasn't. The last 5 or 6 years have been difficult for almost all businesses and although we've experienced some success, we've had to work very hard for it. But there is a silver lining. We started our business during the dot com bust and as a result, we learned how to survive in a lean environment. We took a two-pronged focus to the market during this long-term downturn. First, we brought in more cloud options for our clients - cloud solutions make it possible for organizations to bring more efficiency to their business at a lower cost. Secondly, we've focused on business agility. One of the core benefits of moving a business into The LUCK Principle is that the business becomes much better at recognizing trends before it is too late. When the marketplace had significant setbacks about 4 years ago, it caught many businesses by surprise and they had to make drastic decisions very quickly. Through more predictive business analytics, businesses have now learned to see prob-

lems coming further in advance, and make incremental changes to prepare for them. Through better collaboration systems, businesses are able to change the direction that they are going with greater agility, responding more quickly to changes in the marketplace. Many generals say that, "those who change the fastest will win," and many businesses have felt that they've been put into a war zone in recent years and have found it helpful to adopt new approaches that make them more nimble.

Put into technical terms, many businesses are saying that they don't want to have to support a large number of different systems anymore. Some are even saying that they want to be out of the technology business altogether. The cloud and easy-to-extend collaboration platforms have made it possible for organizations to shed technology in the same way that they were able to shed their old power generation technology at the turn of the last century.

We recently had a higher education client tell us that over the next five years they literally wanted to get rid of all their applications, even most of their accounting applications, and run their entire organization in Microsoft SharePoint and Dynamic CRM. Between the two of those platforms, they can do about 90% of what they need to do. With some additional customization, they can get that close to 100%. When they accomplish that, all of a sudden they need a fraction of the technical resources they have today because their IT team needs to support a much smaller number of different platforms. Learning curves are shorter because their team always has a familiar user experience. In addition, all of these are cloud-enabled so, if they choose to migrate to the cloud, they don't need people in their data center to manage the servers. Bottom line: they can focus on what they are in the business of doing, and not on technology.

So you might say that our silver lining IS the cloud!

CEO CFO: Why should investors and

people in the business community pay attention to C5 today?

Mr. Ables: Today there are three different factors coming together to create a wave of demand. C5 Insight is positioned to ride all three of these to build a significant practice.

Businesses will migrate from their own data center to the cloud. We are at the very beginning of this wave. Ten to fifteen years from now, people will plug into applications in the cloud the same way that they plug a TV into a power socket. During this time, there will be an increasing amount of hype about what this is all about and they will be looking for trusted partners to help them make good decisions about this transition. Most of the companies that they are turning to are either 100% in the cloud or 100% in the data center and cannot be relied on for unbiased counsel.

Creating applications is requiring less and less code and a greater focus on

architecture. Businesses are looking for partners who can help them use a “near codeless” platform to differentiate their business, but who can also provide the coders when necessary. There is hunger in the marketplace to cost-effectively deploy technology that works the way the business does while enabling the business to continuously improve the technology without bringing expensive full-time coders on board. Very few companies can provide the full range of services required to: fully understand the business, provide a deep solution knowledge, quickly configure without writing code, develop code where appropriate, and transfer the knowledge to the client to take a project over once it has gone live.

Lastly, we are at the very beginning of the social collaboration revolution. Kids getting out of college today view email as a dinosaur – they expect to exchange information using the social metaphor that they have grown up

with. This will change the business world. Most of our competitors are focusing in the wrong place – on using social networking as a marketing tool. While that is important, the real transformation will take place inside the business. If you asked a business person today what the impact of cutting off email would be, most would respond that their ability to communicate internally would be seriously damaged - - they might not even mention marketing. The same will be true of social collaboration.

C5 Insight is a professional services firm posed to ride the crest of all three of these waves of change, providing our clients with objective counsel, technology experts and proven solutions.



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