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## Innovation Vista - Enabling SMB to Leverage Top-Flight IT Leaders Affordably



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**CEOCFO: *Mr. Roberts, would you give us a little history of Innovation Vista?***

**Mr. Roberts:** I started Innovation Vista in 2019 after five tenures as CIO at midsize companies. When my last company was acquired by a much larger competitor, I determined rather than try to find another CIO role, that I wanted to start this consulting practice and bring a lot of what I had success with, to smaller companies between \$50 to \$500 million dollars in revenue.

I wanted them to benefit from the amazing technology advances that have come in the last few years that have opened the door to some amazing capabilities. A lot of companies cannot afford a full-time CIO. A lot of them are operating with a middle manager, leading the group and designing the platform.

Our whole value proposition is to bring CIO-level experience to small and midsize companies affordably, either on a short-term or part-time basis, to leverage their expertise to make better decisions and understand the "art of the possible".

**CEOCFO: *What type of companies and industries do you serve?***

**Mr. Roberts:** We operate in every English-speaking market in the world. We're primarily in the US but we have consultants literally on every continent. We market and speak to clients on every continent in English-speaking markets. We serve every industry now including public sector, private sector and public companies. We're able to do that through the building of this enormous consultant network that we have undertaken. A lot of my work early on was making contact and vetting former CIOs and CTOs who are now freelance consultants; I built that network to identify top people that I would feel good about putting in front of a client and assigning to a project.

We have over 300 consultants now in that network; about half of those are semi-retired successful CIOs that are not interested any longer in a W2 kind of job but still have valuable and relevant experience and the most important experience. We find that the things that really matter at the C-level with innovation and having technology initiatives

really succeed, is leadership, culture, influence with the rest of the C-Suite to win hearts and minds. We have built a network of people with those skills.

**CEOCFO: *How do you reach out to find new CIOs to join your network? Is it important for them to live locally in the area they are servicing? Do they have to travel?***

**Mr. Roberts:** That is great question, and one to which my answer has changed since the COVID pandemic when so many were asked to work from home. Before the pandemic we talked more about "Fractional" CIO services than virtual. In the fractional world we expected consultants to come into clients' offices. So early on there was a lot of face-to-face. When the pandemic hit the world there were so many negative aspects, of course, but one silver lining for our business model was the comfort level that business executives began to have interacting with people virtually via video conference in addition to phone calls and emails. That opened the door much wider for us to find qualified consultants. Now for example we have a consultant in New York City supporting a client in California.

Rather than geography per se, I would say it is a time-zone criteria now more than being in the same market. We still see a benefit in face-to-face meetings at times, with consultants traveling into our clients' office, so if they are further away that means a plane ride. However, the need for that is rarer. Most of our interactions today are virtual, so we began to refer to the service as "Virtual" CIO, rather than fractional.

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**CEOCFO: *How do you reach potential customers?***

**Mr. Roberts:** I do some speaking and publishing personally, but a lot of our business development is either word-of-mouth or individual conversations. We contact people via LinkedIn, which is the source of most of our consultant leads as well, and the personal contact, the one-on-one, building a relationship and building trust with a client. It is a real specialty need when someone needs a contract CIO. They often do not realize the art of the possible, that technology could be doing more for their organization than it is. Some of what we do is educational and helping to broaden their horizons. We have not done a lot relative to conferences and just what you would call more traditional sales. Our focus has been more on relationship building and one-on-one interactions.

**CEOCFO: *How long do your relationships generally last with customers?***

**Mr. Roberts:** It varies widely. We have one engagement in which we're in our third year, so that is an indefinite service that we are providing. As long as they remain happy our consultants are happy to provide that service helping to innovate and further mature their IT. Other projects are time-constrained.

Many of our engagements begin with an IT assessment. Sometimes if it is a private equity group looking at an investment or to acquire a company, they just want a high-level view on whether things are ok, so it is only that assessment which we can complete in two weeks. At other times, they're looking for a strategic roadmap after that assessment, and that extends things a few months. From there if they want help to bring that roadmap to life, we enter an interim or virtual CIO relationship. It really is a pretty wide spectrum on the lengths of our engagements from weeks to years or indefinite.

**CEOCFO: *Would you tell us about digital transformation, which has come to mean different things to different people? How is that a part of your service offering?***

**Mr. Roberts:** Yes, "digital transformation" is one of those terms that has really been abused and misused all over the market. Some people think that you have done digital transformation if you license Zoom and enable video conferencing. The way we think of it is that it really should achieve a significant change in a company's business model. That involves rethinking and envisioning a new future where technology has transformed the business model in some significant way, whether it is pricing, geographic reach, creating new revenue streams, and/or significant acceleration of existing revenue streams with technology capabilities. That last theme probably is the most common that we see.

We help companies develop technology and data capabilities that their competitors cannot match, which they can make very front and center in their marketing and sales activities. When you find something that moves the needle for a client's customers, you see that topline growth come in quickly. That is extremely exciting. Ahead of all these things, we try to

calculate the starting point and what kind of revenue growth we can say is driven by the digital transformation. I am very proud to say that we are over \$1.1 billion cumulative revenue that has been driven by technology and data capabilities we've led. That is revenue those companies would not have had without those technology investments.

Sometimes we are actually leading the charge and sometimes we are more in the advisory capacity where there is a head of IT in place but maybe overwhelmed with other work. At other times the background of that IT leader is focused mainly on keeping the lights on - infrastructure, operations, cybersecurity - all those things are important, but with that focus exclusively, they're not looking for revenue impact from IT.

In any of those situations, without our help it would be difficult to lead a major innovation effort. We come in and help them and draw from our considerable strength in this area. We were just named "The Most Promising Digital Transformation Consultancy for 2022" by CIO Review magazine. Even just to make the Top Ten list was amazing, looking at the fantastic firms on that list, so to be at the top of the list was very exciting and humbling.

**CEO CFO: *When your CIOs start an engagement, do they find any kind of resistance from within the organizations?***

**Mr. Roberts:** Absolutely. I was mentioning earlier the really important skills that our consultants have built, winning hearts and minds among the skeptics in an organization, building trust and influence, partnering across the C-Suite in our clients, understanding how CFOs, COOs, CEOs think, what they care about and worry about. As you can imagine, doing an uplift of any kind - and especially a digital transformation - really is a major investment. It is just like putting capital to work acquiring an adjacent business or competitor or opening a new location. These represent significant dollars invested only for the purpose of the promise of that return. If you have executives skeptical about that return, whether it is real or will work like we say, it creates significant friction. So a lot of what we do is just establishing trust with these clients to find the right investments everyone can believe in.

It is about finding the right answer, making sure we do not overpromise and what we do really does have that return. It is an important skill for our consultants and it is one on which I make sure I vet former CIOs, as I am interviewing consultants to bring into our network.

**CEO CFO: *Where do you see future growth?***

**Mr. Roberts:** We are happy with our trajectory, and I think our best path for continued growth is organic. There are still a lot of companies that do not know about us; maybe that is because we've only been getting the word out for 3 years or so now. We do get referrals from happy clients, testimonials and referrals. I guess it is the old-fashioned way to grow, but that is what we see. We're not aware of any other firm out there doing what we do the way we do it, so I don't know that there is any kind of growth by acquisition that makes sense for us. We just hope that the small and midsize companies for whom our approach makes sense do hear about us and give us a chance to show them the kind of impact we can have.

**CEO CFO: *Are you well-funded for the future and health of the company; are you looking at partnerships or investors?***

**Mr. Roberts:** We are not in need of outside investment really, but we are always looking for situational partners. The nature of what we do is very focused just on C-level strategy and leadership. As you can imagine, making these things happen for clients requires really good partners for execution. There are all kinds of skillsets in the IT universe from data to cybersecurity to infrastructure, and applications. We are constantly on the look-out for great partners to deliver those skill-sets and capabilities for the strategies we've envisioned for our clients.

We don't see tying ourselves together with an implementation firm permanently, but just on a project by project basis as needed. We like that flexibility, that we can choose the best match for any given situation. That is also why we are not a Microsoft or Oracle or AWS or SAP or Salesforce Platinum partner. We like that agnosticism that we can choose technologies and partners for each situation and each client that make the most sense.

**CEO CFO: *What sets you apart from the other CIO companies out there, and why is Innovations Vista a special company?***

**Mr. Roberts:** There are two major things that we believe we do better than our competitors. The first is how we match consultants with client projects. Many consulting firms believe that if someone has gone around the block technically and they have done something similar, no matter in which industry, they are a good fit. Whatever size a traditional consulting firm's bench might be, it is certainly smaller than our network of 300 plus consultants. Who gets assigned for a particular project for them often comes down to who is available and not actively billing another client. In our model, we find client projects truly the best fit having both the technical experience needed and relevant industry background. I think that approach sets us apart, that our consultant walks in the door understanding the business model and the regulatory environment, what competitors are doing, and what are the major system platforms that are in use.

We hear stories all the time about our competitors sending in a consultant, even a very senior-level IT leader - they are smart and know what they are doing technically, but they have to spend the first six weeks of an engagement learning the business and the industry and terminology, where the revenues come from and the costs, and what will move the needle. Our consultants start off knowing all of that on day one.

Our second distinctive is our focus on topline impact. We talked about it in the discussion about digital transformation, and I think our attention to that is no small part of why we were put on the top of that list of promising consultancies. We do not see a lot of IT consulting firms thinking or talking about revenue and market share. More often their focus and their models are all about efficiency, saving money, implementation - helping to select the best packages and then putting the right architecture in place. Those things are important and they are part of what we need to do in our role as contract CIOs, but they often stop there and really do not consider the other entire horizon of possible IT impact.

When we bring our framework to the table and talk with clients about our success stories of new revenue streams, accelerated sales and market-share, that really resonates with CEOs. There is a saying that "you cannot save your way to growth" and that is typically the mindset of CEOs and boards. CFOs are usually excited about savings; CEOs' eyes really light-up when we talk about top-line impact and how they can win business from their competitors.

IT consulting is a crowded space for sure, but I do think that these two distinctives set us apart and make us the best choice for at least some small and midsize organizations.