

Patty Block Qualifications & Media Kit

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BLOCK CONSULTING

Block Consulting helps organizations grow. We do this by developing engaging branding, business development, sales, marketing, PR, and social media strategies and plans that work.

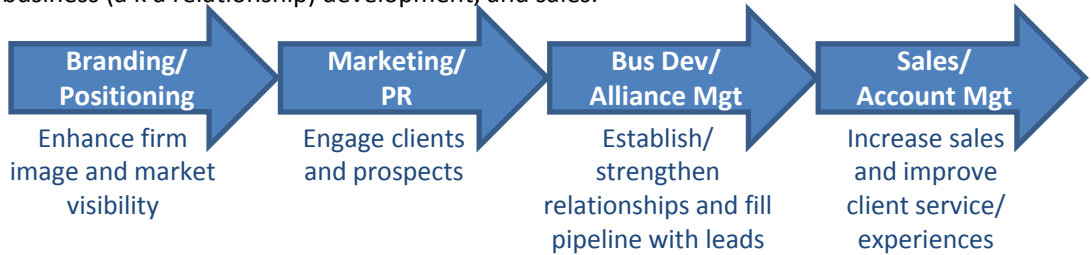
Patty Block, founder and managing director of Block Consulting, has a passion for creative ideation. She enjoys exchanging ideas with clients and using her creative energy to help achieve valuable outcomes. Patty develops innovative approaches that deliver high-impact, revenue generating results across the entire branding, marketing, business development, and sales spectrum.

We work with startups, SMEs, and Fortune 100 technology, professional, and business services organizations to plan and implement powerful initiatives. Our fresh thinking on market positioning, compelling communications, eye-and ear-catching PR, engaging bus dev programs, and sales strategies attract clients’ and prospects’ interest *and* increase sales. Our services added over \$385M in sales and complimentary press for EBSuite, Ernst & Young, Lee Hecht Harrison, Novatix Corp., Oracle, Spencer Stuart, Meridian Builders & Developers, Right Management, and *Sunset Magazine* (not inclusive).

We uncover new opportunities, secure alliances, establish and nurture relationships, increase PR/social media visibility (both online and offline), and expand your business referral network.

What are our greatest talents?

We consistently deliver game-changing results in branding, marketing, PR communications, business (a k a relationship) development, and sales.



How do we accomplish this?

By listening closely, asking the right questions, sharing knowledge and best practices, and uncovering new and add-on opportunities. We utilize the most gracious – yet tenacious – follow-up methodology you will ever experience. Our work broadens your market footprint and adds sales. Contact Patty so we can share ideas, develop and execute energizing programs, and help grow your business.

“Block Consulting’s creative branding, design, writing, and business development talents significantly enhanced our school’s visibility. Patty’s work helped increase student enrollment over 30%. We are very happy with the return on our investment in Patty’s services.”

- Surinder K. Singh,
Administrator,
Foster City
Preschool &
Daycare Center



Patty Block, Founder & Managing Director

Patty is expert at positioning services and products, uncovering new business opportunities, generating demand, tracking leads, closing sales, and generating ROI. Applying a “do whatever it takes” approach, Patty consistently delivers extraordinary client service and the highest quality results on time and on/under budget.

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Sales Success in Six Easy Steps

Follow these steps to drive successful “closed-loop” business development planning and execution – and achieve revenue-generating results.

By Patricia Block

Marketing and sales go hand in hand. In other words, the impetus is there to market something because, bottom line, you want to sell something, be it a product or service.

Some people advocate building sophisticated business intelligence platforms and CRM (customer relationship management) systems and databases. However, in my humble opinion, many do not place enough emphasis on the basic block-and-tackle required to successfully market and sell something. You can spend a lot of time developing strategies to market your business, but none of that glorious whiteboard visioning will mean a thing unless you follow an easy set of steps that support successful business development planning and sales execution.

I have created many different sales presentations that describe the “closed-loop” approach to marketing and business development that I recommend – but the basic steps are always the same:

- 1. Identify your audience.** To whom do you want to market and sell?
- 2. Build – or buy or rent – a database of these names.** You want to be able to reach out, communicate with and track every contact you make with every one of your clients and prospects. At a minimum, your database should include name, address, phone, email, URL, and a way to track the history of your contact and all interactions.
- 3. Identify the best ways to reach your audience.** What do they read, what industry and community events do they attend, what web sites do they visit, what blogs do they read or post to, where do they hang out in their leisure time, and so on and on.
- 4. Define the activities, ways, and things you can do** to be present, make contact and engage your audience. Reach out through each of these venues so that the opportunity is there for them to notice you and your product/service. The more you can actively engage your audience – i.e., they feel compelled to respond – the better.
- 5. Create a list of milestones and a calendar of activities to engage your target audience.** This means writing a one-page summary for each program that explains the Who, Why, What, When, and How (steps/action items). Next, create a one-page 12-month calendar of these concurrent and consecutive marketing and business development activities, conferences, special events, programs, and so on. And then?
- 6. Execute!** A sale is all about establishing, nurturing and growing relationships. The more your targets experience “personal” interaction on an iterative basis – e.g., a phone call, email, direct mail, meeting you at a special event, seeing you speak or participate on a panel, and so on – the more likely it is that they will keep you and your offering in mind...and, ultimately, buy what you are selling. Also important: share content and ideas that are valuable (not just marketing propaganda). This will gain the confidence of both clients and prospects and help close the deal. [Brand building and sales through “closed-loop” bus dev and marketing](#): keep reaching out and connecting with your target audience, time and time again. Do not consider the loop closed until you have brought on a new client or sold additional services to an existing one.



Build your Brand and generate Sales through CLOSEDLoop Marketing and Bus Dev activities

CLOSEDLoop Bus Dev and Marketing



- Merge relationship management with campaign management and sales
- Build and confirm a business development strategy, use consistent messaging, focus on tiered target audiences, and have the tools in hand (e.g., social media & videos: success stories, case studies, client testimonial) that illustrate how you can help solve their problems
- Develop an integrated plan and calendar that includes all relevant client/prospect touch activities, including the “who, why, what, when, and how”

STORY BACKGROUND: James P. Petray is CPA and Partner, Burr, Pilger & Mayer LLP (BPM), an Assurance, Tax, Consulting and Wealth Management Organization

Prospect's 1st set of interactions with Burr, Pilger & Mayer

1. Speaking Engagement & Database Marketing

* American Institute of Certified Public Accountants

Jim Petray's speech at AICPA* National Auto Dealership Conference 2011 arouses

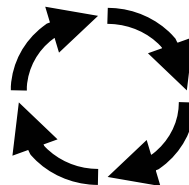
Interest

BPM Marketing obtains attendee list.

Jim mails invitation to AICPA* Personal Financial Planning webinar gets Prospect's

Attention

2. Webinar



Prospect replies to email, visits BPM web site and reads Auto Dealership newsletter.

→ Involvement

3. Web/Content Syndication

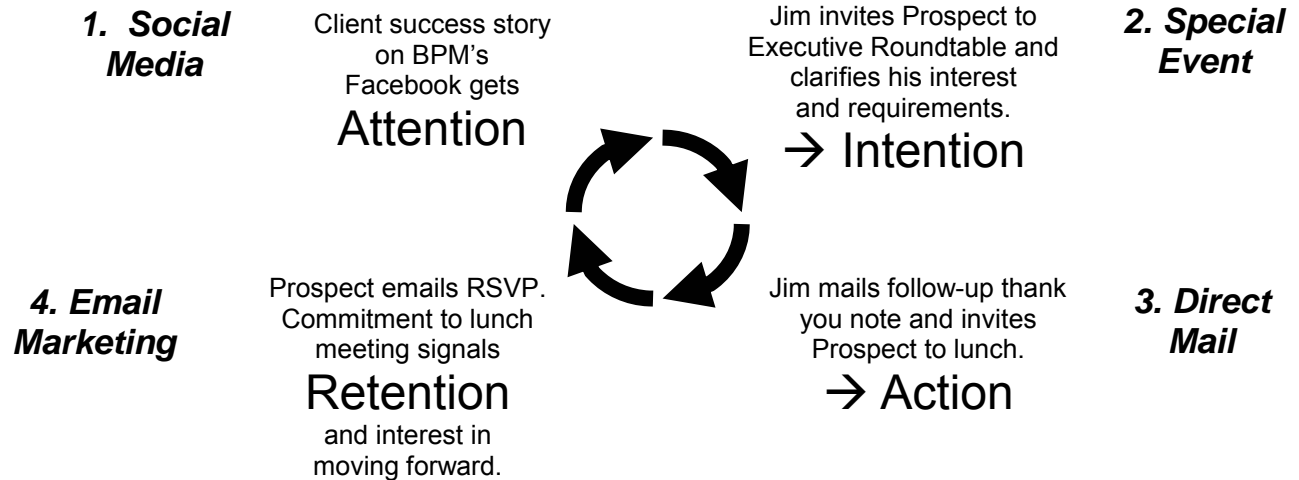
4. Email and Phone Call

Auto-respond email thanks Prospect for his interest.

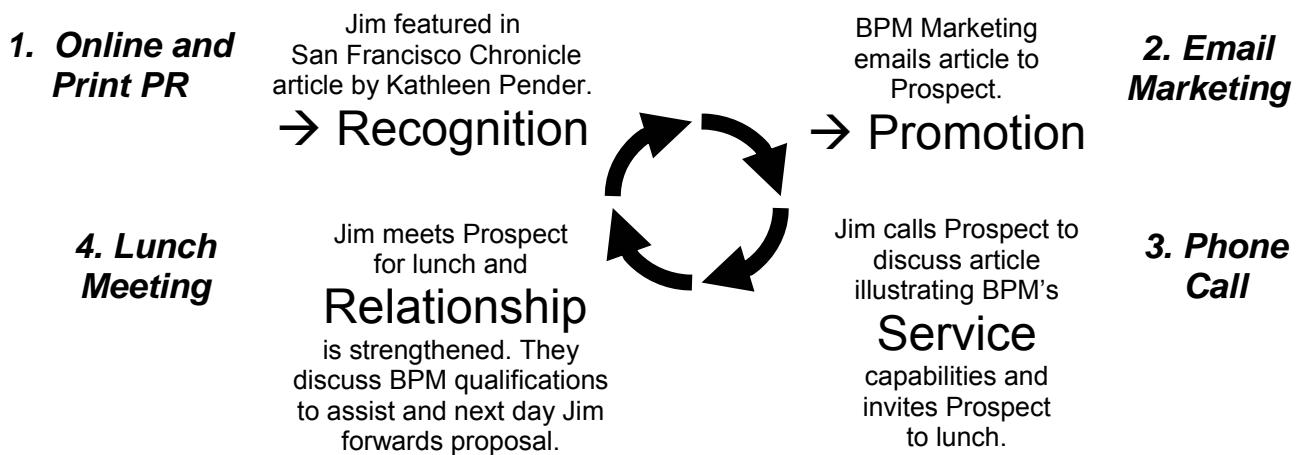
→ Interaction

Jim makes follow-up call to answer any questions.

Prospect's 2nd round of exposure to Burr, Pilger & Mayer



Prospect's 3rd set of experiences with Burr, Pilger & Mayer



And so on and on...

CLOSEDLoop Marketing and Campaign Management generate Sales

- **Get attention** through online client success stories, case studies, articles, press quotes.
- **Generate interest** through database marketing, Facebook/Twitter promotions, LinkedIn groups, special events, and prospect/client-touch activities.
- **Drive involvement** through email, content syndication, and social media.
- **Establish and strengthen relationships** through referrals and follow-up emails, value-based content, and special event campaigns.
- **Create a call to action, generate leads and close sales** through ongoing contact, consistent messaging, and one-on-one relationship development.

Sunset San Francisco Idea House

Patty Block proposed and secured a \$2M joint venture with [Sunset Magazine](#) for Meridian Builders & Developers, Inc. *Sunset* selected Meridian to build their magazine relaunching [Sunset San Francisco Idea House](#). The project, for which Patty also secured over \$500K in green building supplier and service sponsorships/contributions, resulted in one of the [world's 12 greenest homes!](#)



SF Mission District, 25th Street @ Alabama

“You can’t put a price tag on that!” said a former VP with Ogilvy PR, about the face-to-face market visibility, television, print, and online coverage – along with the Mayor’s Office interest – achieved for Meridian Builders & Developers.

AllBusiness.com Videos: Green Building, Business Development and Marketing Best Practices

- [Living the Dream: Starting a Construction Company](#)
- [The Systems & Philosophy of a "Green" Construction Company](#)
- [Write a Good Business Plan for Your Construction Company](#)
- [How to Motivate Employees](#)
- [How to Be a Successful Woman Contractor](#)
- [The Biggest Advantage to Having Subcontractors on Staff](#)
- [Learn the Value of Delegation](#)
- [Hire Outside Legal Experts](#)



[“Finding a Niche and Bringing Subcontractors on Staff”](#)



Patty Block, Managing Director, [Block Consulting](#), green building marketing best practices

- [Why the Green Building Niche Is Important](#)
- [Effectively Market Your Company](#)
- [Connect With Your Target Audience](#)
- [Direct Mailing: Close the Loop](#)
- [How to Hire a Marketing Professional](#)

- 10 weekends of Idea House tours and tens of thousands of visitors!
- Two *Sunset* cover stories, circulation >1 million
 - [“Inside Our Greenest Idea House,”](#) Nov. 2007
 - [“Ideas to Steal! Our Greenest House Ever,”](#) Mar. 2008
- [San Francisco Mayor](#) Gavin Newsom’s Idea House Walkthrough, CNET TV. The home’s 45-foot wind turbine inspired the Mayor to launch an Urban Wind Task Force and leverage the city’s natural energy-producing winds.
- [“Living Green,”](#) TV broadcast on *View from the Bay*, San Francisco KGO, Ch. 7
- [“The Systems and Philosophy of a Green Construction Company,”](#) one of over a dozen [AllBusiness.com](#) videos featuring Robin Wilson, President and General Contractor, Meridian Builders & Developers
- [“Urban Green: Sunset’s Idea House Brings Energy Efficiency to Living in the City,”](#) *The Mercury News*
- [“Sunset SF Idea House is Open!”](#) Design Public blog



And much more!

THE POWER OF THOUGHT LEADERSHIP

Surveys, Research Studies, White Papers, Executive Briefs

Thought Leadership Projects Have Amazing Impact

- Surveys, research studies and white papers are powerful business development tools.
- The product – survey results or white paper – is important. But **the real payoff comes while engaging clients and prospects in the data collection process** through live interviews and electronic or mailed surveys
- Thought Leadership projects:
 - Position firm as innovative thought leader
 - Illustrate access to industry and market leaders
 - Serve as basis for high-level discussions with target audience
 - Establish hundreds of new relationships
 - Expand the firm's market footprint
 - Generate incremental

EXAMPLE: [“Will You Be Ready? How the Communications Industry is Surviving While Planning for a Robust Future”](#)



Spencer Stuart's Technology, Communications, & Media practice conducted numerous surveys and studies. They secured industry and media alliances – e.g., the Telecommunications Industry Association (TIA) – conducted face-to-face and phone interviews, and electronically surveyed TIA members & other targeted executives. Results:

- Led to \$ millions in new search work
- Established and strengthened relationships
- Secured speaking and panel opportunities

The Process

- Create list of companies and executives that you want to work with.
- Brainstorm an appropriate subject, make the title relevant, newsworthy and compelling – i.e., something that affects your target audience's business – and they will respond. Why?
 - People like giving their opinion because it makes them feel that their ideas matter, and
 - Executives want to learn what their peers and market leaders are thinking and doing.
- Develop a plan for data collection and writing survey results.
- Build high-level outline of assumptions, findings, and conclusions.
- **Important:** Collaborate with industry association or publication. This helps:
 - Enhance study cachet
 - Broaden market reach
 - Increase practice and firm visibility
 - Expand your business referral network
 - Secure numerous speaking and panel opportunities
 - Generate leads and new business
- Contact clients and prospects and invite them to participate in survey – **these data collection interviews open doors, establish and build relationships, and generate new and add-on work.**
- Draft survey results and highlight interview quotes. People look first for powerful commentary when reading newspaper stories, magazine articles, annual reports, etc.
- Obtain feedback on draft from colleagues, clients, PR firm, then edit and publish survey report.

Results--New Clients and Sales! Other ways to leverage survey/study/white paper:

- Email top line findings to prospects and snail-mail to dormant clients to re-establish contact.
- Distribute at networking events, industry forums, conferences and speaking engagements.
- Media Coverage
 - Use survey results to get “foot in the door” and establish relationships with news media and business publications.
 - Excerpt and repurpose content for newspaper articles, business magazines, and newsletters.
 - Leverage survey and study results as basis for business journal article or book.



Patty Block: Made introductions, secured alliances and joint ventures. Generated over \$4M in revenue and significant free PR for clients.

Organization	Program/Activity	Intro/ Alliance	Deliverables	PR/Press	Revenue
Spencer Stuart Technology, Communications & Media (TCM) Practice (Retained Executive Search)	Market Survey / Study / Intellectual Capital Project: Communications Systems & Services Specialty Practice Group	Eric Nelson, VP, Global Network Marketing, Telecommunications Industry Association (TIA)	<ul style="list-style-type: none"> White Paper: “Will You Be Ready? How the Communications Industry is Surviving While Planning for a Robust Future” Dozens of new and strengthened relationships with industry executives and new search work 	“Spencer Stuart and TIA Collaborate on Study: How Companies Survive the Downturn and Implications for Recovery”	\$500K
Spencer Stuart Technology, Communications & Media (TCM) Practice	Market Survey / Study / Intellectual Capital Project: Software Specialty Practice Group	John Desmond, Editing Director, Software Magazine	<ul style="list-style-type: none"> White Paper: “How Sales Leadership Differentiates Top-Tier Software Companies” Dozens of new of new/strengthened relationships with industry executives and new search work 	“Best Practices of Successful Software Salespeople” -- Article on study featured in Summer blockbuster ‘Software 500’ issue	\$400K
Spencer Stuart Technology, Communications & Media (TCM) Practice	Market Survey / Study / Intellectual Capital Project: Media Specialty Practice Group “Leadership in Media” study examined how media companies are changing their	Bill Gloede, Editor and Vice President, Business Development & Public Affairs, MEDIaweek	<ul style="list-style-type: none"> Two <i>MEDIaweek</i> cover stories Dozens of new of new relationships with media executives and new search work 	MEDIaweek cover story: “Advertisers Size up Media Sellers” MEDIaweek cover story: “Media’s New Mindset”	\$375K



Organization	Program/Activity	Intro/ Alliance	Deliverables	PR/Press	Revenue
	business and executive leadership strategies to better serve customers	Magazine			
Meridian Builders & Developers	Introduced Meridian to <i>Sunset</i> Magazine, and secured joint venture with iconic Western home/food/lifestyle magazine	Dan Gregory, Home Editor, Sunset Magazine	<ul style="list-style-type: none"> Meridian led design and build of magazine-relaunching <i>Sunset</i> San Francisco Idea House, one of the world's 12 greenest homes Built relationship with San Francisco Mayor Gavin Newsom's office Company evolution: Meridian CEO launched Whirligig, Inc., the leading provider of wind turbine installations in Northwest U.S. 	<ul style="list-style-type: none"> 10 weekends of Idea House tours and tens of thousands of visitors Two <i>Sunset</i> cover stories, circulation over one million: <ul style="list-style-type: none"> "Inside Our Greenest Idea House" "Ideas to Steal! Our Greenest House Ever" "Living Green," TV broadcast on <i>View from the Bay</i>, San Francisco, KGO, Ch. 7 "Working with the Wind," CNET TV – San Francisco Mayor Gavin Newsom's Idea House walkthrough inspired formation of city Urban Wind Power Task Force to leverage 	\$2M



Organization	Program/Activity	Intro/ Alliance	Deliverables	PR/Press	Revenue
				<p>Bay area's natural energy-producing winds</p> <ul style="list-style-type: none"> • “The Systems and Philosophy of a Green Construction Company,” One of dozens of AllBusiness.com videos featuring Robin Wilson, CEO and General Contractor, Meridian Builders & Developers, John Lum, Architect, and Patty Block 	
Crawford & Associates International (Change Management)	Introduced Ric Roi, VP of Change Management, to HR.com and secured joint venture. Ric now serves as SVP with Right Management.	David Whitmarsh, Regional Director, HR.com	“ Leadership Practices , Adaptive Culture, and Company Financial Performance”		\$200K
Novatix Corp. (IT Security Software)	Secured interview, introduced CEO Paul Panepinto to Lew McCreary, and secured press coverage	Lew McCreary, Editor-in-chief, CSO (Chief Security Officer) magazine	<ul style="list-style-type: none"> • Established market presence • Generated industry and media buzz 	<p>“PC Tools leap-frogs the competition”</p> <p>Press coverage in <i>CSO</i> and <i>PC World</i> resulted in acquisition by PC Tools just 6 months later</p>	\$550K



Organization	Program/Activity	Intro/ Alliance	Deliverables	PR/Press	Revenue
WESCO (Electrical Industrial Supplier)	WESCO-CSC hosted 10 Sustainability Summits across the US, in Dallas, New York, San Francisco and other cities. These symposium-style events provided education on the opportunities and benefits of green buildings and green data centers. The summits addressed major 21st century issues including energy security, environmental impact, achieving sustainability across the entire supply chain, and ways to make companies more competitive.	Dan Geiger, Executive Director, US Green Building Council, Northern California Chapter USGBC-NCC	Dan served as keynote speaker for WESCO-CSC Sustainability Summit 2009 , San Francisco		\$165K
				Total	\$4.19M



PATTY BLOCK QUALIFICATIONS

Spencer Stuart Technology, Communications & Media (TCM) Practice

Patty Block led dozens of brand building and new business initiatives for Spencer Stuart, including six thought leadership market surveys and numerous sales campaigns. These programs, for which Patty uncovered and secured industry and media partnerships, generated over \$3M in sales.

Specialty Practice Group	Market Survey/Study	Alliance Partner	Presentations and PR
Venture Capital (VC)	<p>“Tier One Talent: Investment Strategies for Human Capital”</p> <p>Market survey/study examined the talents and attributes required for CEOs to achieve success for VC-backed companies. Orchestrated VC executive and portfolio company CEO interviews/electronic surveys.</p>	National Venture Capital Association (NVCA)	<p>PRESENTATION: “Venture Backed Leadership: Mastering Investment in Human Capital”</p> <p>PRESS: “The NVCA and Spencer Stuart Collaborate on Study of CEO and Management Leadership”</p>
Communications Systems & Services	<p>“Will You Be Ready? How the Communications Industry is Surviving While Planning for a Robust Future”</p> <p>Led CEO and General Manager electronic surveys/interviews</p>	Telecommunications Industry Association (TIA)	<p>PRESENTATION: “Executive Summary: Communications Industry Research Study”</p> <p>PRESS: “Spencer Stuart and TIA Collaborate on Study: How Communications Companies Survive the Downturn and Implications for Recovery”</p>
Software	“How Sales Leadership Differentiates Top-Tier Software Companies”	Software magazine	PRESS: <i>Software</i> magazine published article featuring study: “Best Practices of Successful Software Salespeople”
Media	“Leadership in Media” study examined how media companies are changing their business and executive leadership strategies to better serve customers	MEDIAWEEK	PRESS: MEDIAWEEK published two cover stories featuring “Leadership in Media” study: <ul style="list-style-type: none"> ▪ “Advertisers Size up Media Sellers” ▪ “Media’s New Mindset”
Internet	“Easing Out the Founder: Managing a Successful Founder/CEO Transition”		PRESENTATION: Silicon Valley Venture Capital Human Capital Breakfast
Direct & Interactive Marketing	“Mastering CRM: The Latest Technology, the Right Leadership Team, Effectively Managing Change”		



PATTY BLOCK QUALIFICATIONS

Ernst & Young Global Client Consulting Practice

The firm hired Patty Block to create practice branding and a sales/marketing infrastructure for the firm's U.S. Southwest Region. Patty served as marketing and business development executive for the Telecommunications, Consumer Products and Financial Services revenue teams. She led numerous branding, account planning, and business development activities and spearheaded targeted pursuits and proposals for the revenue teams and Southeast geography. These initiatives generated over \$160M for the Atlanta office and over \$275M for the region.

Company/ Other	Pursuit/Initiative	Led Team	Contributions	Value
Georgia-Pacific	Shared Accounting Services Preliminary Systems Design (PSD) Proposal	35+	Wrote executive summary and major portions of 200-page proposal .	\$60M
Avco Financial Services	" Insight " – Half-day presentation peeled back the roof. Enabled Avco general management team to experience in real-time future state vision of global information systems design and implementation project.	50+	Envisioned and directed unique pursuit strategy. Designed and produced program and presentation set (photos). Managed script development, wrote proposal and all branding materials .	\$50M
Y2K New Product/ Service Launch	Handpicked by Ernst & Young senior business development executive to participate on firm's 100-member Y2K Task Force.	15+	Created firm-wide branding and service naming strategy. Co-created Y2K brochure . Developed Y2K proposal template , wrote services profile , and led development of sales training materials.	\$40M
Sprint	Selected by senior partner to lead response to RFI to Reengineer their Finance function.	15+	Under five-day deadline, defined positioning strategy and messaging , led research and design team and wrote major portions of proposal.	\$11M
Phillips Petroleum	Systems design contract.		Hosted CRM Event/Golf Tournament at multiple CIO Perspectives conferences. Event strategy improved client relationships and supported resulting sale to Phillips.	\$1M



PATTY BLOCK QUALIFICATIONS

Company/ Other	Pursuit/Initiative	Led Team	Contributions	Value
CSX	Strategic information systems plan.		Hosted wine tasting held for Southeast Senior IS Executive group. Event cemented relationship with client and helped close sale.	\$1M
"An Evening with Colin Powell"	Orchestrated national branding initiative for Ernst & Young. The Atlanta office hosted one of four events featuring General Colin Powell as guest speaker. This joint program was co-sponsored by the SouthWest Region Global Client Consulting Practice and the Southeast and Atlanta office's Audit & Tax Practice.	35+	<p>These events elevated the firm's national brand and reputation, established and grew relationships with attending CEOs and positively impacted the firm's strategic account planning and sales.</p> <p>Invited Fortune 500 CEOs and spouses to a special evening (photos) – including cocktails, conversation, Gen. Powell's remarks, dinner, and dessert – at The Lionheart, a privately owned mansion in Buckhead, a community north of Atlanta. Fourteen CEOs/spouses attended, along with multiple E&Y senior partners and firm leaders.</p>	\$20M



Targeted Pursuits

Client and prospect engagement. Enhanced relationships. Incremental revenue.



“Patty Block’s ability to develop a powerful response, drive the right messaging and successfully position the firm helped improve client relationships and close multimillion dollar contracts.”

- Bob Patton, Americas Leader, Advisory Services, Ernst & Young

► Organization: Ernst & Young, Financial Services Revenue Team

SITUATION

- Ernst & Young had recently completed a comprehensive visioning project for Avco Financial Services, including the strategic plan for their global custom systems design and implementation initiative.
- Since E&Y served as Avco’s auditor, Avco wanted to be absolutely unbiased in their decision-making. Headquartered in Irvine, CA, Avco placed the firm on a short list of providers and forwarded an RFP to the Southwest Region’s Global Client Consulting Practice.
- The opportunity was substantial, forecasted to be a \$50 million-plus engagement.

STRATEGY & ACTIVITIES

- Patty Block led ideation and developed the strategy for Avco to experience in real-time E&Y’s approach for Avco’s global custom systems design and implementation.
- The presentation, called “Insight,” included hosting half-day event in which the Practice - through a built-out production set and series of venues - created a future state vision of the project.
- The “Insight” presentation portrayed Avco’s future global Core Systems design and implementation project. The event enabled Avco’s general management team to walk through the project and genuinely experience the strategic, systems and technological competitive advantages they would receive by partnering with E&Y.
- Patty organized and led a 50+ member team that tore down and rebuilt a portion of the firm’s Orange County office. She produced the set and directed project team’s configuration and installation of all hardware, software and systems integration devices.
- Patty led script development, helped write the proposal and crafted promotional materials.

RESULTS

- Ernst & Young won \$50 million engagement to design and implement Avco’s Global Core Systems.
- Services and benefits included:
 - Implemented sophisticated customer database and analytics programs, including key demographic data. This database technology enabled Avco to host state-of-the-art call centers.
 - Enabled Avco to identify their most profitable customers and dealers.
 - Advanced technology provided regionally sensitive and accurate credit scoring systems - e.g., in-store POS terminals routinely provide credit approval in under one minute.
 - Reduced field and headquarter operating costs, which Avco passed on to customers in reduced rates and improved customer service through their advanced systems.



Targeted Pursuits

Client and prospect engagement. Enhanced relationships. Incremental revenue.

► Organization: Ernst & Young, Telecommunications Revenue Team

SITUATION

- Sprint submitted a Request for Proposal (RFP) for Ernst & Young to lead the reengineering of the company's entire Financial function, including all systems and supporting business processes.
- Patty Block wasn't officially supporting the Telecommunications Revenue Team, but a senior partner, Bob Patton, specifically requested her involvement. Patty flew to Kansas City to help lead the response.
- The firm was under a very tight deadline - only five days to research, write, design, produce and deliver the proposal.

STRATEGY & ACTIVITIES

- Sprint provided very specific formatting for the proposal. The firm's ability to respond in a unique and creative fashion was limited.
- Patty met with senior partners on the pursuit team, quickly came up to speed on the issues, Sprint's specific challenges and initial thoughts on approach.
- Following brainstorming session with account executives, Patty developed a positioning strategy, work plan and time line. She created proposal layout and wrote major portions of content, highlighting the firm's competitive differentiators, qualifications and unique ability to serve.

RESULTS

- Ernst & Young secured engagement worth over \$11 million.
- Services and benefits included:
 - Implemented effective business planning and reporting and cost-effective financial processes.
 - Increased the value of the finance function by providing critical decision support information.
 - Improved the quality and cost effectiveness of their transaction processing using standardized systems operating in a shared services environment.

Patty Block was the first Senior Marketing Business Leader hired by Ernst & Young's Global Client Consulting Practice, SouthWest Region. Patty worked closely with firm Managing Partners to create and implement a focused revenue and account team planning strategy and model.

Patty led the development and implementation of tools that standardized the strategic account planning process. She optimized the utilization and measurement of resources and performance management tools for various industry and geographic revenue teams and led multiple business development initiatives that optimized the firm's marketing return on investment (ROI).

The strategy to hire a professional exclusively dedicated to marketing and business development was incredibly successful and significantly impacted Ernst & Young's bottom line. In turn, the firm's SouthWest Global Client Consulting Practice hired multiple Marketing Business Leaders for the region's major hub offices: Dallas, Houston, Los Angeles, St. Louis and San Francisco. The Senior Marketing Business Leadership team envisioned and orchestrated various client retention and acquisition programs that generated over \$275 million in revenue. Patty's leadership and contributions to the Atlanta office exceeded \$150 million in incremental revenue.

For other organizations - e.g., Oracle Corp., Spencer Stuart, Lee Hecht Harrison, Lautze & Lautze and Meridian Builders & Developers, Inc. - Patty researched, tested and implemented new techniques for conducting research, enhancing client satisfaction and measuring marketing project ROI.

EXAMPLE: For retained executive search firm Spencer Stuart's Technology, Communications & Media Practice, Patty envisioned, launched and managed multiple flagship business development programs that generated over \$2 million in incremental revenue. These market survey and research study initiatives involved extensive statistical analysis, which examined and reported on responses from hundreds of survey recipients and personal interviews with clients, prospects and industry thought leaders. Patty and her colleagues utilized complex statistical analysis techniques to measure the responses and report on the skills and attributes required for VC-backed portfolio company CEOs to be successful and generate profit. These initiatives led to speaking opportunities and panel presentations, expanded the firm's network with senior industry decision-makers and generated a PR return on investment of close to 300%.



Market Your Expertise Effectively

By: Herminia Irizarry
Issue Date: March 2009



Do you consider yourself an expert in the plumbing industry? Are you a forerunner in the [latest plumbing trends and technologies](#)? If so, it may be time to take your advertising to the next level and translate your expertise into marketing value.

“With an industry expert, you know you’re getting someone who will get the job done right the first time, and stand behind their work,” says David Schuelke, president of Schuelke Plumbing, a full service plumbing company based in Los Angeles.

Schuelke adds, however, that industry expertise takes a while to gain. Before you can even consider taking the steps towards marketing your knowledge, you need to have a solid business base.

“You really need to take a step back and fine tune the details that make a successful company,” Schuelke says. “But once you gain that reputation, it snowballs from there—it all comes to you.”

With a successful business in tow, your credibility as a plumbing industry expert will begin to build, but there are things you can do now to emphasize your expertise and then market it.

According to Patty Block, principal of [Block Consulting](#), a business development and marketing/PR consultancy based in the San Francisco Bay area, the first step to gaining industry expert status is to compile a [Customer Relationship Management database](#) that can be as simple as an Excel spreadsheet.

“Build a list of names: organizations, people and media that you think can help you get visibility and generate business,” she says. “You really have to think, ‘Who are the industry organizations and publications I can ally with?’”

To gain entries, Block says networking is the best place to start. She recommends starting with trade organizations, and getting involved with local and national plumbing councils. Create a list of editors and reporters with the local media who specialize in real estate and construction. Once you have set up your database, Block recommends reaching out to those individuals on a regular basis.

When building your database, include information about local events and take part in them—you want to get the community aspect, Block says. She recommends sitting on a panel, serving as a speaker or renting a booth at a trade show.

“Use these events as a springboard to promote yourself,” she says. “You get a chance to get visibility and talk about your work and expertise.”

Another opportunity to showcase your expertise is to reach out to the local media with story ideas about plumbing tips or [eco-friendly plumbing trends like WaterSense](#). Perhaps even seek out a monthly or quarterly contributing writer position with a local magazine or newspaper.

“As long as a you have a good story that will help the public, then that’s the way to add credibility,” says Schuelke, who with his twin brother Jimmy, have appeared on local television channel KTLA in Los Angeles, “Home Wizards” radio show and the entertainment news show, “Extra.” “If you can advertise in those areas, you’re going to be looked at as a company with a lot of experience that really knows what it’s doing.”

Having a good presence online is also key. “A good, developed Web site adds to your credibility and enhances your reputation,” Block says. “A Web site is one of the most invaluable marketing tools because that’s where people go to learn more about a company.”

Using imagery and customer testimonials on your Web site, Block recommends putting together a portfolio to demonstrate your expertise. Your Web site is also an opportunity for you to showcase any awards, event and media participation, as well articles or blogs you may have written.

In order to maintain your expert status, you have to back it up with a solid business, expert knowledge and superior service. According to Schuelke, the biggest testament to his company’s expertise is its A+ rating from the Better Business Bureau.

“We are in the business to help people,” Schuelke says. “We’re constantly training, and tracking our employees and the whole operation. And we’re constantly doing research on the best the industry has to offer.”



Advertising in the 21st Century

Social media has changed the way companies advertise. Now more than ever, small businesses can promote themselves online by targeting customers and expanding their networks, often for little or no cost.

By: Clare Curley
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As more customers go online, Internet-based tools like Facebook and LinkedIn can help contractors [promote their businesses](#)—at little or no cost—by fostering new connections and showcasing their [industry expertise](#).

To use the tools themselves, the cost is generally free, although making the most of social media requires a time commitment. “Your success depends on how much focused effort you put in,” says Barbara Rozgonyi, owner of Cory West Media, a Chicago-based media consulting company. Businesses can [promote themselves](#) through a variety of techniques: Targeting customers by demographics, contributing to online discussions and drawing attention to new services.

They’re not the place to blast ads, though. “What you really do is add value,” Rozgonyi says. “For example, home owners always want to know what everyone else is using,” she says. Therefore, a remodeler can draw more attention to himself by posting the top seasonal colors or countertop materials—whether through Twitter, Facebook or a blog—rather than simply advertising his or her services.

Here’s a rundown of the most popular social media sites, and how they can help your business:

1. Twitter.com

Users post frequent, casual updates, making Twitter a time-intensive tool. First, create a profile. Then, from a computer or cell phone, start “tweeting”—posting information that can be a mix of project updates, expert opinions and consumer tips. You can even provide links to photos of past projects or useful articles. Also, do key word searches to locate upcoming projects in your industry, and seek out potential clients.

Twitter enables you to gain “followers” by browsing other profiles to find people with similar businesses or interests. “Over time, you can become a personality people want to know more about,” says Rozgonyi.

Tip: The more relevant your entries are to your industry, the more connections you will attract.

2. Facebook.com

Are you trying to expand business into a specific area of town? Facebook enables you to search people by zip code, among other demographics—and for others to find you the same way.

With more than 200 million active users, Facebook is the fastest growing social network in the world. Use it to create a group of like-minded people in your industry, and unlike Twitter, you can actually upload images and post longer comments.

Tip: Use the “Status” line on your profile page to advertise new business offerings.

3. LinkedIn.com

LinkedIn is primarily used for making business connections. Check out “Company Buzz,” a feature that shows you the Twitter activity associated with your company. Then, broaden your network by recommending the work of colleagues, and in turn, they can recommend you. Update your status box regularly to reflect new contracting projects.

Tip: Use the “Search Groups” function to contact marketing groups and industry organizations.

4. YouTube.com

“If a picture is worth a thousand words, a video is worth a million,” says Rozgonyi. YouTube offers a cheap way of showcasing property or completed projects. Videos can remain on the site indefinitely, and people interested in your services can post comments through the site.

Is your personality stronger than your writing skills? A brief video can showcase your charisma as well as your work.

Tip: To avoid production costs, buy a flip camera and download video editing software to make your own.

Take advantage of search engine optimization

“Ideally, everything you do online should match up with what people are searching for—your URL address, your IDs, your profile names,” says Rozgonyi. Google [https://adwords.google.com/select/KeywordToolExternal] can help optimize the use of social media and other online tools, and will suggest key words that best match your business.

Tip: For more suggestions, conduct searches using competitors’ URLs, as well.

Mix your methods

Ultimately, media experts recommend pairing online with traditional methods of communication.

Patricia Block, principal of [Block Consulting](#), a business development and marketing/PR consultancy based in the San Francisco Bay area, suggests saving money by advertising via new and old media alike. Post an ad on Craigslist, as well as in a small local paper. Or, volunteer at a community event where you can get mentioned in online flyers advertising the event.

“Face-to-face networking and referral-building is still the most effective way for small business owners to advertise,” she says.

A trend you cannot ignore

According to a recent Forrester report, social media spending in the United States will grow from **\$716 million** this year to more than **\$3.1 billion** in 2014.

Endorsements for Patty Block

“Patty Block's ability to develop a powerful response, drive the right messaging, and successfully position the firm helped improve client relationships and close multimillion dollar contracts.”

– Bob Patton, Americas Leader, Advisory Services Group, [Ernst & Young](#)

I've known Patty for over 25 years, beginning as colleagues at Andersen Consulting in the mid-1980's, and continuing through her work as an independent consultant the last several years. Her market positioning, consultative selling, and client relationship management talents have provided extraordinarily valuable outcomes for her clients and former employers.

– Kurt Miller, Partner & Senior Executive, [Accenture](#)

“Patty's work was always incredibly good, thorough and very professional. It was great working with her.”

– Harry Somerdyk, Director, Media Practice, [Spencer Stuart](#) (retired), and former Senior Vice President of Marketing and Brand Development, *Business Week*

“Patty introduced Meridian Builders & Developers to *Sunset* magazine and secured the \$2M joint venture. *Sunset* selected Meridian to build the magazine relaunching 2007 San Francisco Idea House. You can't put a price tag on that!”

– Former VP, [Ogilvy PR](#)

“Patty Block is an outstanding and talented marketing professional. Patty is greatly influencing and affecting our firm. Her creativity, vision, communication skills and work ethic are infectious. Her influence upon the staff is already visible. Case in point, after the Hopkins & Carley event, for the first time we saw San Jose staff performing follow-up with potential referral sources. They are contacting the Hopkins people! You can see and sense their enthusiasm. There is no possible way that this will not help the firm on many fronts.”

– Stephen P. Carter, CPA and Partner, [SingerLewak](#), Accounting and Management Consulting Services Firm, and former Director, Lautze & Lautze

“Patty provided great PR leadership in Novatix's beta-phase media activities. She secured interest and conversations with chief editors and reporters at several high profile IT and security publications and planted seeds for future coverage as we grew our customer base. Her innovative methods led to positive results with all the publications we sought after. Patty is a valuable resource. Her top qualities: great results, expert, creative.”

– Paul Panepinto, VP Business Development and Marketing, [Green Plug, Inc.](#), and former CEO, Novatix Corp., an Internet security software company (Symantec acquired Novatix in May 2007)

“Thanks to Patty Block's creativity, initiative, and persistence, we secured the Telecommunications Industry Association (TIA) to co-sponsor our survey and study. Being the high-profile industry group that it is, TIA added add great credibility to our venture.”

– Tom Scanlan, Director, Technology, Communications & Media Practice, [Spencer Stuart](#)

Endorsements for Patty Block

“Block Consulting successfully established and built relationships with various high profile media, which have proven to be a valuable asset for the practice. Patty Block demonstrated great initiative and quickly delivered results which, in turn, helped us achieve continued media coverage in Bay area, national, technology and venture publications, including *The Wall Street Journal*, *Fortune*, CNN, *Business 2.0*, *Red Herring*, *The San Francisco Business Times*, and many others.”

– Scott Gordon, former Partner, Technology, Communications & Media Practice, [Spencer Stuart](#)

“Block Consulting’s creative branding, design, writing, and business development talents significantly enhanced our school’s visibility. Patty’s work helped increase student enrollment over 30%. We are very happy with the return on our investment in Patty’s services.”

– Surinder K. Singh, Administrator, [Foster City Preschool & Daycare Center](#)

“Patty Block and her firm were tireless supporters of the BIG TEAM Regatta. Her PR efforts helped us get radio coverage and spread the word about the corporate challenge’s inaugural year in San Francisco. She also was intimately involved in the creation of our marketing collateral, which has been used by all Regattas across the US. Patty was a pleasure to work with, and I’d recommend her to anyone who values professionalism.”

– Jay Palace, Founder, [The BIG TEAM Regatta](#) (Non Profit),
and CEO, [GEL Corp.](#) (Group Experiential Learning)

“Block Consulting has deep insights about business and about people – plus Patty Block’s writing is terrific!”

– Bill Wiersma, Principal, [Wiersma and Associates](#), author of *“The Big AHA! Breakthroughs in Resolving and Preventing Workplace Conflict,”* and recognized leader in organizational development, change management, coaching and training

“I have known Patty through some mutual organizations and committees. She is always personable and professional. I could always count on her to come up with creative ideas. Patty advised me on some potential business connections. She also had some very helpful contacts that will further my project. I am very impressed by her quick grasp of the issues. Patty immediately began running down several ideas and people she knows who may help. Her top qualities: great results, expert, creative.

– [Geri Spieler](#), Master Researcher at Internet Research Skills Webinar,
and Book Reviewer at [New York Journal of Books](#)

“Patty is a bright, motivated and vibrant person with an exceptional understanding of engineering principals and a solid work ethic. To her credit, she has continued to expand her capabilities and apply these same principles in the professional marketing arena. It comes as no surprise that she possessed the personal initiative to start her own corporation and it is without hesitation that I can strongly recommend Patty and her corporation.”

– Russell Shostak, Chief Operating Officer, [Automotive Containment and Consulting, Inc.](#),
and graduate, University of Pittsburgh
