



For
The logo for 'On demand advisors' features a circular arrow icon to the left of the text. 'On demand' is in a black serif font, and 'advisors' is in a bold red sans-serif font.

***Own Your Market:* Brand Building and Closed-Loop Marketing**

From
**Patty Block, Founder & Managing Director
Block Consulting**

October 2011



What is Branding?

- Branding is all about creating an image, establishing, then reinforcing that image in your client's mind
- It is critical to know and communicate to clients the emotional and rational connection you want them to make with the firm
- Reinforcing your brand through clear and effective marketing communications and packaging is essential



Why Brand?

- Creating and reinforcing a powerful differentiated brand that sticks in clients' minds helps build business
- Developing a unique value proposition and effectively communicating your messages emphasizes the importance *and* benefits of doing business with you
- It is important to link your brand with emotion

“A brand is the emotional shortcut between a company and its customers.”

Ted Leonhardt, design firm business consultant and an occasional lecturer and workshop leader at the [School of Visual Concepts](#), co-founder of The Leonhardt Group and former chief creative officer of Fitch Worldwide.



Reinforcing Your Brand

- Image is not enough
- Reinforcing your brand through outreach and consistent communications is critical
- The firm can create a consistent message through practice mindset, actions, words and behaviors
- “Solution branding” will help reinforce the idea of a business partnership with prospects and clients

“Brands are not defined solely by a company or vendor, but by the community of users who talk among themselves.”

Rich Karlgaard, Columnist and Publisher, *Forbes* magazine and author, [“Life 2.0: How People Across America Are Transforming Their Lives by Finding the Where of their Happiness.”](#)

Brand Building through Closed-Loop Marketing, PR and Bus Dev/Sales Programs

A brand is what results from marketing consistency.

- Merge marketing with relationship management.
- Build and confirm a marketing strategy, focusing on your target audiences, key messages and value proposition.
- Develop an integrated plan that includes all relevant client/prospect-touch activities:
 - Ad campaigns
 - Article placement
 - Blogs and web site marketing
 - Client advocacy
 - Direct mail
 - Email campaigns: press releases, case studies
 - Intellectual capital: Market surveys, research studies, white papers
 - Panel and speaking
 - PR and media outreach
 - Senior forums and conferences
 - Social web marketing
 - Strategic alliances (generated >\$4M in sales)



Closed-Loop Marketing is Effective

- Each channel has its own role
- Your branding is reinforced by combining all business development activities in a virtual circle - i.e., “closed loop” marketing
- Repetition/constant reiteration works
- Consistency and rapid response are essential

Touching Clients and Prospects...

...in a positive and iterative way - through all channels - will reinforce your presence and brand

1. Thought Leadership
2. Content / Placement
3. PR: News releases, press mentions, media quotes
4. Web Content / Online Marketing / Social Media
5. Email Campaigns
6. Senior Forums and Special Events
7. One-on-One Client Touch programs
8. Industry and Media Alliances
9. Client Advocates and Testimonial
10. Industry and Financial Analysts

Examples for channels 1-6 follow...

Thought Leadership Projects

EXAMPLE

["Tier One Talent: Investment Strategies for Human Capital"](#)

Results

- 82 VC and CEO interviews
- 41 new VC relationships
- Over \$1 million in new search work

- Serve as basis for high-level discussions at CEO and board levels
- Provide genuine differentiation
- Reinforce positioning with decision-makers
- Illustrate access to industry leaders
- Position company as thought leader
- Provide instant credibility
- Most important: The process serves as a great business development tool by opening doors and establishing / building relationships with prospects and clients

"Intellectual capital is the sum of everything everybody in a company knows that gives it a competitive edge."

Thomas A. Stewart, author of ["The Wealth of Knowledge: Intellectual Capital and the Twenty-first Century Organization,"](#) and award-winning member of the board of editors of *Fortune* magazine.

Content / Placement

Strategic Content has two purposes: Illustrates that you are a subject matter expert *and* that you have recent / relevant experience. You need to come across as someone that the reader will find caring, approachable and pleasant – not just that you know your subject cold.

EXAMPLE

[“How to Conduct a Job Search”](#)

By Tony Leng,
Partner w/ client
Hodge / Niederer /
Cariani (now
Diversified Search)

↓
Article
Placement

Kennedy
Information's
[Recruiting Trends](#)
[Thought Leadership](#)

- **How-to Articles.** Describe a situation that might confront the reader – either a problem or an opportunity – and gives steps for dealing with it. It's practical in tone and straightforward to write.
- **Case Study.** Demonstrate real-world solutions that help solve real-world issues. Generally includes 1) Description of the situation, 2) Your solution, 3) The result. Another approach: offer to co-write with a client. From an editors' perspective, if a client is involved the piece has more credibility.
- **“Trend” Articles.** Show understanding of issues facing your market. They describe how a situation developed, current status, and how it might develop in future. Use when you want to demonstrate mastery of your own skill-set and your understanding of the reader's world.
- **Opinion Pieces.** Editors often welcome informed opinion articles, provided you can back up views with solid evidence. These pieces demonstrate the writer to be knowledgeable about the issue and caring enough about it to put it in print.
- **Pitch “Story Ideas”.** Editors welcome nuggets related to stories and trends in the news. They will assign someone to write the article (which means that you ultimately lose control over what the article says).



Promotion, Press & PR

- Media and press relationships help build brand awareness
- Quotes, firm news and press releases enhance credibility
- Branding works best if you first get the reader's undivided attention – in a compelling way, share that the firm provides remarkable services!

“The greatest gift that PR people can deliver is the telling of stories that inspire action. PR pros can help companies demonstrate leadership and prove accountability.”

Richard Edelman, President and Chief Executive Officer of the [Edelman](#) public relations firm, a position held since September 1996. Clients include Schering-Plough, Swiss Re and Gap. He has counseled several countries on economic development programs, including Egypt, Israel and Mexico.

Web/Online/Social Media

- Provide instant access to your thought leadership and latest industry news – e.g., client [Ann Edminster](#), M. Arch. and Net Zero Energy design expert, featured on “[The Renewable Energy Hour](#),” KZYG, Mendocino County Public Broadcasting 90.7, Sep. 19, 2011. The next week, Ann’s book, [ENERGY FREE: Homes for a Small Planet](#), achieved “September’s ‘**Best of the Month**’” on Amazon!
- Accentuate your knowledge and services – e.g., client EBSuite [case study](#)
- Include links to strategic partner web sites – e.g., client CEO Sara Roberts, [Roberts Golden Consulting](#), featured on [Human Capital Institute](#) web site

“Experiences - not advertising induced perceptions - will drive brand attitudes.”

(and build client allegiance as well)

Jim Nail, Chief Marketing and Strategy Officer, [TNS](#) Media Intelligence/Cymfony, a market influence analytics company, and former analyst, Forrester Research.



Email/Telesales Campaigns

- Serves as a reminder and helps close communication loop
- Reinforces relationships and your presence
- Helps keep you and the company first in mind *and* grows sales – e.g., email / telesales campaigns for client [Brandon Hall Group](#), leading publisher of learning and talent management research, achieved 537% ROI in <4 months

“E-mail is the killer application for relationship marketing.”

[Seth Godin](#), bestselling author of “All Marketers Are Liars,” “Permission Marketing,” and several other books; former *Fast Company* contributing editor; and founder and former CEO of Yoyodyne, leading interactive direct marketing company, acquired by Yahoo! in late 1998.



Senior Forums / Conferences

- Industry forums and networking activities raise awareness like no other activity can
- Clients and prospects are certain to be there. Speaking and panel opportunities, hospitality suites or hosted lunches / dinners are excellent ways to establish and build relationships
- Notable conferences – e.g., client Rick Smith, Director, Spencer Stuart, presented [top line findings](#) of “[Tier One Talent](#),” a market survey and study on VC-backed portfolio company leadership, to standing room only crowd at annual [NVCA](#) conference in San Francisco. The event generated 11 qualified leads and >\$500K in new search work.

“Good conferences are about connections, human connections. They are also about the experience, not an individual session.”

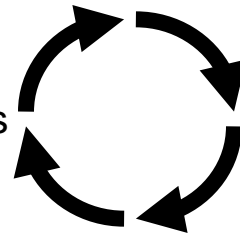
From the Book “[Enterprise One to One](#),” by Don Peppers and Martha Rogers

Closed-Loop Marketing

Prospect's 1st exposure to various channels

1. Press and Email

Jeff Hodge
(Vice Chairman,
Diversified Search)
emails press
release to business
contacts re Marty
Africa joining firm
and gets prospect's
Attention



Jeff's speech
at [FORTUNE's Most
Powerful Women
Summit](#) arouses
Interest

2. Conference

4. Email and Phone Call

Auto-respond email
thanks prospect for
their interest
→ **Interaction**
Jeff makes
follow-up call to
answer any questions

Prospect visits
Diversified Search
web site and prints
article by Jeff
featured in *CFO*
magazine
→ **Involvement**

3. Article Placement and Web Site

Closed-Loop Marketing

Prospect's 2nd exposure to various channels

1. Web Site

Client case study on firm web site gets prospect's

Attention

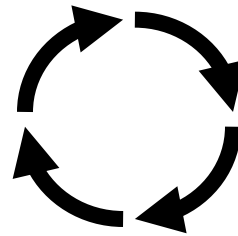
Prospect's email address is captured

4. Email

Prospect's commitment to lunch meeting signals

Retention

and interest in moving forward



Jeff exchanges emails/calls, invites prospect to [The Annual CFO Rising West Conference and Exhibition](#), and clarifies prospect's needs

→ **Intention**

Jeff mails follow-up thank you note and strengthens relationship

→ **Action**

2. Email, Phone call and Special Event

3. Direct Mail

Closed-Loop Marketing

Prospect's 3rd exposure to various channels

1. Web Media and PR

Jeff's quote in [Fortune](#) article by Vickie Elmer reinforces firm brand
Recognition

Prospect joins Jeff for lunch
→ **Participation**

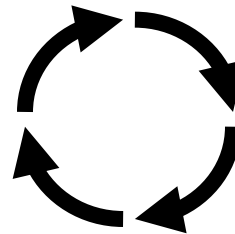
2. Lunch Meeting

4. Email and Phone Call

Qualifications slide presentation is emailed. Jeff calls and walks through document with Prospect.
Relationship is strengthened and search terms solidified

Business 2.0 online article illustrates Jeff's financial acumen, search and
Service capabilities

3. Web/Online



And so on and on...

Closed-Loop Marketing



...engage clients and prospects, generate interest, and increase demand for firm services.



Closed-Loop Marketing

- Each channel (Social Media, Email, Web Marketing, PR, Speaking, Special Events, Strategic Alliances, etc.) has its own role
- Power comes from combining all in a virtual circle (“closed loop”), measuring results, and refining activities
- Repetition/constant reiteration reinforces the message and helps build your brand
- Consistency is important

Closed-Loop Marketing and Brand Reinforcement Activities...

- ➔ **Get attention**
through blogs, Twitter, press quotes, client success stories and case studies
- ➔ **Generate interest**
through press relationships, personal contact, web promotions, special conferences, and client-touch activities
- ➔ **Drive involvement**
through email, webinars and online experiences
- ➔ **Establish and strengthen relationships**
through introductions, email, follow-up calls and face-to-face meetings
- ➔ **Plant business development seeds**
through ongoing contact, consistent messaging and one-on-one market positioning

Sample Program Plan and Calendar

Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

Phase 1

- Launch media outreach activities, getting visibility for noteworthy placements and monitor media for coverage and quote opportunities
- Confirm and finalize messaging
- Build proof-points to substantiate firm messaging and write case study for CleanTech and Industrial practices
- Craft messages and proof points for Consumer practice, including development of PowerPoint presentation
- Launch industry study and white paper “Corporate Social Responsibility (CSR): What is your organization doing to help make the planet green?”

Phase 2

- Secure 2012 senior forum speaking and panel opportunities
- Jeff Hodge presents at [NACD Board Leadership Conference 2011](#), Oct. 2-4, 2011, Wash DC
- Secure column for Betty Hasler in *Reactions* (financial pub for global insurance market) or other targeted industry publication
- Launch direct mail campaign
- Present results of study top line findings at CleanEdge conference
- Develop targeted messaging, proof points, presentations and case studies for all firm practices
- Launch Client Advocacy program across all practices

Phase 3

- Ghostwrite and place Jeff’s bylined article in *Chief Executive* magazine
- Betty Hasler presents at [Wharton PE and VC Conference, Feb 2011](#)
- Tony Leng presents at the [2012 Wine Industry Symposium](#)
- Mail results of industry study and white paper
- Secure speaking opportunities to present study results
- Schedule and hold meetings with prospects qualified through CSR study/white paper interviews



Closed-Loop Marketing and Brand Building

Q&A

Patty Block Branding, Marketing, BusDev, Sales, PR and Account Management Services

Patty Block offers deep and proven marketing and business development experience in software, technology, professional services, eLearning, leadership, consumer packaged goods, retail, and green/sustainable building. She has a passion for formulating unique and powerful approaches that increase market traction and grow sales.

Patty's market positioning, sales, writing, and PR communications talents have helped Fortune 100, small and medium sized businesses and startup/emerging companies organizations grow shareholder value. She has over 15 years experience creating and implementing branding and strategic communication programs and leading targeted sales pursuits. These activities increase awareness, cultivate demand and generate significant revenue – e.g., >\$450M for EBSuite, Ernst & Young, Lee Hecht Harrison, Oracle, Spencer Stuart, and Meridian Builders & Developers, Inc. (not inclusive).

Before forming Block Consulting, Patty served as Marketing Director, Consumer Sector Worldwide, Oracle Corp. She led the global go-to-market planning and implementation for Oracle Consumer Packaged Goods (CPG) and Oracle Retail. Prior to Oracle, Patty directed marketing, strategic communications and business development programs for Ernst & Young's Management Consulting Practice. She led development of a new sales and account management infrastructure and led many sales pursuits, proposal and market development projects for the Southwest Region and multiple industry-based revenue teams.

Patty began her career in management consulting, specializing in manufacturing information technology at Andersen Consulting and Coopers & Lybrand. A graduate of the University of Pittsburgh, *summa cum laude*, with a B.S. in Industrial Engineering, she also completed business masters studies at Northeastern University.

Patty has a passion for writing. A columnist for the [San Francisco Examiner](#), her beats are society, culture and women's issues. Patty is also a contributor to [NiemanWatchdog.org](#), "Questions the press should ask," a project funded by the Nieman Foundation for Journalism, Harvard University, and a member of the National Association of Science Writers (NASW).

Patty Block
Founder & Director
Block Consulting
San Francisco Bay Area, CA
(650) 344-6691

[Email](#)
[Web](#)
[LinkedIn](#)
[Founder, Prof Svcs BusDev Group, LinkedIn](#)
[Market-Guru Blog](#)