



Consulting Practice Proposal and Pursuit Initiatives Client and prospect engagement. Enhanced relationships. Incremental revenue.



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

- Bob Patton, former President, Gartner Consulting, former CEO, Government Solutions Group, Cap Gemini Ernst & Young, and former Senior Partner, 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 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.



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► 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 led a team of 15 consultants, who collaborated to conduct R&D and develop proposal content. Patty also wrote major portions of proposal, 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.

Patricia Block was the first Senior Marketing and Consulting Practice 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 consulting practice marketing return on investment (ROI).

The strategy to hire a professional exclusively dedicated to marketing and consulting practice management was incredibly successful and significantly impacted Ernst & Young's bottom line. In turn, the firm's South-West Global Client Consulting Practice hired multiple Marketing and Consulting Practice Leaders for the region's major hub offices: Dallas, Houston, Los Angeles, St. Louis and San Francisco. The Senior Marketing and Consulting Practice 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 consulting practice and 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%.