

## Spencer Stuart Technology, Communications & Media (TCM) Practice

Transformed web marketing and sales operations for retained search firm's TCM Practice and Westplex Region (5 California offices). In less than 24 months, added >\$3.7M in sales for five high-tech Specialty Practice Groups (SPGs). Spearheaded and concurrently managed multiple thought leadership and web marketing campaigns. Created social media programs and led online prospecting. Uncovered and secured industry/media alliances for each digital media survey/study.

### 4<sup>th</sup> digital market survey, 4 sponsors, 62 team members

**SPG:** Communication Systems & Services

**Title:** Will You Be Ready? How the Communications Industry is Surviving While Planning for a Robust Future

**# Prospect Participants:** 48

**Alliance Partner:** Telecommunications Industry Assn

**Sales Operations:**

- Managed sales dashboard; shared project goals, successes and deliverables w/ project team
- Secured speaking roles at two TIA Forums

**# Leads:** 27

**New Revenue:** \$725K



[Project Digital Media Kit](#)



**SPG:** Venture Capital

**Title:** Tier One Talent: Investment Strategies for Human Capital

**# Prospect Participants:** 90

**Alliance Partner:** Nat'l Venture Capital Assn

**Other:** Performed data analysis, created top-line findings, shared on proprietary dashboard

**Sales Operations:** Secured keynote speaking role at NVCA Annual Meeting. Standing room only attendance.

**# Leads:** 35

**New Revenue:** \$1.5M

### 2<sup>nd</sup> digital market survey, 2 sponsors, 25 team members

**SPG:** Media

**Title:** Media Companies are Changing Leadership Strategies to Better Serve Customers

**Other:** Created Statement of Work

**# Prospect Participants:** 11

**Sales Operations:** Two *MediaWeek* cover stories

**# Leads:** 8

**New Revenue:** \$500K



### 3<sup>rd</sup> digital market survey, 4 sponsors, 53 team members

**SPG:** Software

**Title:** How Sales Leadership Differentiates Top-Tier Software Companies

**# Prospect Participants:** 30

**Sales Operations:** Featured story in *Software Magazine's* Summer 500 Blockbuster issue

**# Leads:** 20

**New Revenue:** \$650K

### 1<sup>st</sup> digital market survey, 1 sponsor, 4 team members

**SPG:** Internet

**Title:** Easing Out the Founder: Managing a Successful Founder/CEO Transition

**# Prospect Participants:** 8

**# Leads:** 5

**New Revenue:** \$350K



## Meridian Builders & Developers, Inc.

Rebranded woman owned, San Francisco design-and-build company. Proposed and secured \$2M joint venture with *Sunset* Magazine for Meridian Builders: *Sunset* partnered with client to build magazine re-launching and first urban *Sunset* San Francisco Idea House

### Client's first experience with major digital / media coverage. Complimentary online and print PR worth >\$550K

- Two *Sunset* cover stories, circ. >1M
- "Living Green," *View from the Bay*, KGO, Ch. 7
- "The Philosophy of a Green Construction Company," one of >15 AllBusiness.com / YouTube videos
- Online coverage on hundreds of industry blogs and news media sites



### Client's first media joint venture

- Competed with dozens of multi-billion dollar construction companies
- Coached client CEO on sales positioning and best practices
- ***Sunset* chose Meridian to build 1<sup>st</sup> urban Idea House**



Meridian Portfolio:  
19 Carmel St. project



Mayor Newsom's  
Idea House visit



Mayor Newsom  
Press Conference



### Collaboration with Mayor's office leads to company evolution

- Former SF Mayor Gavin Newsom's Idea House tour, C|NET TV
- 45-foot wind turbine inspired Mayor to launch San Francisco Urban Wind Task Force
- Mayor announced Wind Task Force results at press conference
- Company evolution: Robin Wilson is now CEO of Whirligig, Inc., leading wind turbine installer in Northwest U.S.

### Huge expansion of international referral and sales networks

San  
Francisco  
Idea House,  
Mission  
District,  
25<sup>th</sup> Street  
@ Alabama



- Led online marketing, social media and digital campaigns targeting international material and service providers for in-kind project donations -- secured over \$750K in contributions
- Hosted 10 weekends of Idea House tours and tens of thousands of visitors
- San Francisco Idea House ranked one of world's 12 greenest homes

### Client's first web marketing and sales operations program

- Robin Wilson, President & General Contractor, Meridian Builders, retained Patty's services to lead demand generation campaign (direct & web mail campaigns)
- **Web Marketing & Ops Strategy:** Patty proposed game-changing strategic alliance and secured groundbreaking \$2M joint venture with *Sunset* Magazine

## Oracle Corp. Consumer Sector Worldwide

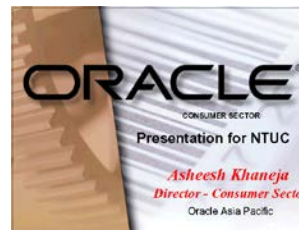
Hired into new role to launch Oracle CPG (Consumer Packaged Goods) industry app targeting market-leading CPG manufacturers. Led Consumer Sector footprint expansion and launched Oracle Retail 9 months later. In less than 17 months, generated >\$58 million in sales.

### Multi-channel campaigns and web media coverage secured favorable press / analyst reviews and increased analyst coverage >15%

- Secured coverage for CPG and Retail through digital ad campaigns, press tours, analyst briefings



### Proactive outreach, consistent brand messaging, multi-channel prospect / client experiences closed >\$12M for retail app



- Confirmed Fortune 100 executive meetings at hospitality suite
- Closed >\$4M in sales at RISON



### Global marketing, online & print ad campaigns increased brand recognition >6%

- Awarded cover stories / industry press - e.g.,
  - CIO Magazine
  - Consumer Goods Manufacturer
- Conducted joint digital media, advertising and advertorial campaigns with high profile customers Kellogg's, Land O'Lakes & Smucker's



### Scaled HQ-based CPG Expo for Oracle Retail hard launch at RISON. Proactive appt. setting generated >\$4M in sales



- Planned / executed digital media awareness campaigns targeting prospects, global trade outlets and media
- Digital media campaigns secured meetings with prospects attending RISON (Retail Information Systems Conference)



### First CPG Industry Expo at Oracle headquarters (HQ)

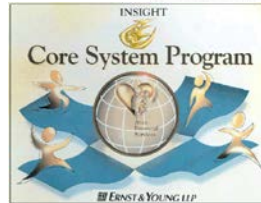
- Launched Oracle CPG through "Seed to Shelf," 2 week Expo
- Secured participation from CPG customers (Kellogg's, Land O'Lakes, Smucker's), arranged for CIOs to speak at press event
- CPG Expo: Created Oracle CPG Value Prop, led sales team training, wrote demo scripts, coached demo rehearsals
- Team Size: 45+ (including management, 3 strategic partners, 6 sr. sales executives, 10 sales engineers, 4 digital media designers, 3 external PR agencies)
- Expo closed >\$26 million in sales

## Ernst & Young Global Client Consulting, U.S. Southwest Region

Hired into new role to create marketing and sales infrastructure for U.S. Southwest Region. Developed new revenue and account team planning models, identified client service opportunities, and created business development / sales strategies. Led numerous proposals and targeted sales pursuits. Closed engagements worth >\$61M for Atlanta office, >\$150M in 19-state region, and helped plan / execute regional sales initiatives worth >\$275M.

### New "Insight" pursuit model dramatically impacted targeted sales activities, improving win percentage >35%

**Prospect:** Avco Financial Services  
**Opportunity:** Global Systems Design & Implem.  
**Contribution:** Led design and build of production set. Half-day presentation enabled Avco general mgt. team to walk through and experience project future state vision.  
**Team Size:** 50+  
**Revenue:** \$50M



### Led pursuit targeting multi-national paper products company. Engagement ensured exclusivity as global service provider.

**Prospect:** Georgia-Pacific  
**Opportunity:** Shared Accounting Services Preliminary Systems Design (PSD) Proposal  
**Contribution:** Led sales team / response to RFP. Wrote executive summary and major portions of 200-page proposal.  
**Team Size:** 30+  
**Revenue:** \$60M



### Led targeted pursuit in response to Sprint's RFP

**Prospect:** Sprint  
**Opportunity:** Financial Reengineering  
**Contribution:** Selected by partner to lead RFP response. Defined positioning strategy, managed research, design and sales teams, and created proposal.  
**Team Size:** 15+  
**Revenue:** \$11M



### Scaled Atlanta-based "Evening with Colin Powell" across region and nationally

**Opportunity:** Orchestrated Atlanta marketing and sales initiative. Office hosted 1 of 4 events featuring guest speaker Gen. Colin Powell.  
**Contribution:** Secured commitment from 14 Fortune 500 CEOs and spouses to attend. New and strengthened relationships created consulting opportunities. Used internal dashboard to capture / communicate sales cycle and progress.  
**Team Size:** 30+  
**Revenue:** \$20M



### Created new Marketing, Sales & Account Planning model. Filled pipeline and dramatically increased sales

**Prospect:** Phillips Petroleum  
**Opportunity:** Systems Design Engagement  
**Contribution:** Planned and hosted Client/Prospect Golf Tournament and lessons at multiple CIO Perspectives conferences. Event improved client relationships and helped close sales opportunity with Phillips Petroleum.  
**Team Size:** 8+ **Revenue:** \$1M

