

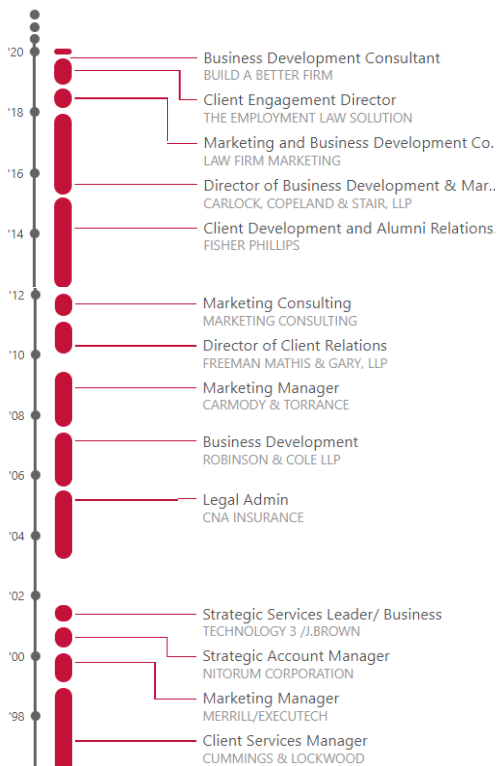
PATRICIA O'TOOLE



Strategic marketing and business development
[Build a Better Firm](#)
PatriciaOToole@BuildaBetterFirm.com
 470.223.8333
 Atlanta, GA
[LinkedIn.com/in/patriciaotoole](https://www.linkedin.com/in/patriciaotoole)

Based on over 20 years of experience with law firms, co-marketing agencies, and technology companies, I work on client-facing programs and outreach, process development and improvement, project and change management, financial analysis, budgeting and ROI reporting.

Timeline



SOCIAL

Member, Indian Hills Country Club and Indian Hills Civic Association, Marietta
[LinkedIn.com/in/patriciaotoole](https://www.linkedin.com/in/patriciaotoole)

SKILLS

Project and Change Management, Client Service and Customer Focus

Brand Strategy, Management and Strategic Planning

Budgets and Financial Reporting for Business Development and ROI

Marketing Content and Client Presentations

Partner with Senior Level Executives to Develop New Offerings

Account Management and Targeted Business Development

Proposals and Customer Agreements

Client Events and Training Programs

KEY ACCOMPLISHMENTS

- Established and managed budget process for three firms
- Full cycle project management from idea to promotion and execution of key business development events for large and small firms
- Conducted financial reviews and worked to align service offerings for profitability
- Established marketing and business development process and new programs for five firms
- Professional liability insurance defense programs for accounting, architecture & engineering, real estate, banking, cyber, and employment law
- Built and improved website and developed client communications for six firms
- Procured target lists and improved CRM segmentation at five firms
- Managed target lists, created and managed direct mail and on-line campaigns
- Established systems, staff and workflow to facilitate transition of consulting practice to business unit within a co-marketing agency
- Supervised four project managers
- Developed business process for account management and product development
- Managed client consultations, creation of proposals, requirements documents, and estimates
- Prepared Operations Manual and Customer Satisfaction Survey

EDUCATION

- Saint Michael's College B.A., Political Science, Cum Laude, Winooski, VT
- University of Vermont, two years of graduate study, Burlington, VT
- Institute of Public Administration, Parliamentary Intern, Dublin, Ireland

CONTINUING EDUCATION

- SHRM, Change Management, Business Intelligence, Data Analysis, Operations Management, Business Strategy, 2018
- Association of Proposal Management Professionals, 2012 to present
- Price to Win and Competitive Analysis, 2013
- SAP FI, 2011
- Six Sigma Lean Training, 2008
- Six Sigma Green Belt, 2005

PATRICIA O'TOOLE

Consultant to Professional Service Providers

November 2019 – Present

[Build A Better Firm](#)

Consult with professional service providers – attorneys, accountants, architects and engineers – on business development in order to expand client relationships and referral sources.

I apply over 20 years of marketing and business development experience with law firms, software companies, and marketing agencies. Busy professionals rely on me to manage client communications, events, and referral programs; making it possible for them to enjoy their practice and concentrate on client work. Project work with individuals and firms includes client service program management, key account, and business development plans. Each project starts with a review of practice and matter financials and a discussion of how to balance career interests with practice profitability. Leverage strong referral network of legal, human resource, accounting, insurance, and technology professionals.

Client Engagement Director

November 2018 – November 2019

The Employment Law Solution, Atlanta, GA

I worked directly with the partners and co-owners of the firm to advance firm administration, marketing, business development, and firm growth.

Projects included:

- ▶ review of firm financials, creation of custom fields and reports (CLIO and Pipeline with CLIO GROW)
- ▶ talent acquisition and management (SHRM member)
- ▶ development of policies and procedures
- ▶ client intake
- ▶ worked with Chambers of Commerce, industry and business groups to identify speaking opportunities and manage events
- ▶ participated in multiple networking groups to identify and pursue leads for business (BNI, chambers and local networks)
- ▶ managed RFP and proposal responses as well as capability presentations
- ▶ weekly progress review of firm annual plan and quarterly objectives
- ▶ procured and managed target lists
- ▶ managed client service programs, events, and client communications
- ▶ developed and managed contact management system
- ▶ developed content for website, social media, and video production

Marketing & Business Development Consultant

February 2018 – November 2018

Consulted with attorneys and law firms on client service program management, key account and business development plans. Coached teams of attorneys as well as individuals in their practice development. Reviewed practice and matter financials and discussed how to balance career interests with practice profitability. Also assisted other professional service groups such as technology, insurance, accounting, architecture and engineering firms with marketing and business development programs.

Consulted with individuals and firms to:

- ▶ improve sales and service culture and practice
- ▶ develop strategies that increase brand recognition
- ▶ implement change management
- ▶ build new business pipelines to reach revenue goals and
- ▶ increase career satisfaction.

Projects included proposal writing, branding strategy, client surveys, community relations, communications programs, practice group plans and financial reviews, seminars, client events, website content, collateral materials, and financial reporting on marketing ROI.

Director of Business Development & Marketing

April 2015 – January 2018

Carlock, Copeland & Stair, LLP, Atlanta, GA, Regional civil litigation firm, 75 attorneys, 3 offices

Management and execution of business development and marketing programs and initiatives. Focused on developing new opportunities, retaining and expanding existing client relationships. Worked directly with practice group leads and firm management. Professional liability insurance defense and cyber liability programs for attorneys, real estate and insurance agents, architects and engineers.

- ▶ Introduced and managed new service offerings and account management best practices.
- ▶ Established marketing and business development budget, expense tracking and reporting with emphasis on ROI. Managed exception/unbudgeted request approval process and produced monthly spend and event spend analysis reports.
- ▶ Developed systems and standards for attorney practice plans, marketing and business development budgets, case results capture, client surveys and event management. Responsible for contact management system, social media, website, blogs and industry surveys.
- ▶ Identified cross-office and cross-practice opportunities.
- ▶ Provided research, target lists and coordinated efforts to expand business.
- ▶ Managed professional network relationships to enhance business development.
- ▶ Managed pitch and proposal submission, including on-line procurement systems.

Client Development and Alumni Relations Manager

March 2012 – April 2015

Fisher Phillips, Atlanta, GA, National labor & employment firm, 300 attorneys, 30 offices

- ▶ Managed all aspects of proposal and presentation research, development, and delivery working remotely and employing Shipley Methods.
- ▶ Review and analysis of financial data, presentation content and representative experience development. Managed proposal submission, including on-line supplier programs such as Ariba and SmartSource procurement systems.
- ▶ Documented proposal process and best practices. Reported on proposal win ratio and developed content database.
- ▶ Managed alumni relations and industry survey responses.

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Director of Client Relations

January 2010 – March 2011

Freeman Mathis & Gary, LLP, Atlanta, GA, Specialty litigation firm of 40 attorneys, labor & employment, insurance defense, construction and government law, 2 offices

- ▶ Marketing, client relations and business development duties for specialty litigation firm.
- ▶ Worked directly with partners, of counsel and associates on business development planning and execution. Introduced new client development and service initiatives such as new client welcome letter and end-of-matter surveys.
- ▶ Managed internal training program, communications and public relations.
- ▶ Client communications: contact database, website, newsletter, and events. Achieved cost savings by identifying and implementing internal creation and distribution system for e-communications. Compiled replies to industry surveys as well as business proposals.

Marketing Manager

August 2007 – July 2009

Carmody Torrance LLP, Waterbury, CT, Regional litigation and corporate law firm with 65 attorneys, 3 offices

Broad marketing and business development position with sole responsibility for client events, presentations and business development activities, including proposals.

- ▶ Managed marketing budget, worked with attorneys to create business development plans and client presentations. Identified and procured target lists, planned, coordinated and managed all client events.
- ▶ Implemented new e-communications program. Created new website design and content resulting in 150% increase per on-line metrics.
- ▶ Prepared reply to Litigation Benchmark Survey as well as Chambers: increased ranking with both organizations.
- ▶ Performed research on client groups, outlined business development objectives, established brand imaging goals and developed templates.
- ▶ Developed media relationships, prepared ads and press releases and public relations activity in line with branding objectives. Promoted editorial calendars and increased publication rates by 50%.
- ▶ Supervised staff and worked with individuals throughout organization to achieve marketing goals. Increased event attendance and client satisfaction by 30%.

Business Development

August 2005 – July 2007

Robinson & Cole LLP, Hartford, CT, Commercial law firm with 250 attorneys, 9 offices in Northeast and Florida

- ▶ Identified, developed and implemented information systems for marketing and business development.
- ▶ Worked with IT/ Systems Department to create requirements document, tested and developed reports regarding practice area financials. Supported cross-sell initiatives.
- ▶ Performed research on industry groups and identified business development opportunities. Managed various projects: client survey, competitor research, PR activity reports. Tracked sources of new client business and monitored practice development plan relationship matrix.

Legal Assistant

March 2003 – August 2005

CNA Insurance, Rocky Hill, CT, Property & Casualty Insurance

- ▶ Supported litigation attorneys in pre-trial preparation of cases. Coordination of calendars, familiarity with court procedures.
- ▶ Completed property and casualty insurance coursework and Six Sigma Training.

Strategic Services Leader/ Business Manager

February 2001 – October 2001

Technology 3/J.Brown, Stamford, CT, Technology business unit within co-marketing agency

Established systems, staff and workflow to facilitate transition of consulting practice to business unit within a co-marketing agency. Reported to Director of Technology.

- ▶ Supervised four project managers.
- ▶ Developed business process for account management and product development related to custom web-based marketing applications designed to automate and streamline channel and co-marketing activities.
- ▶ Project Management – client consultation, creation of proposals, requirements documents, and estimates.
- ▶ Client Service – prepared Operations Manual and Customer Satisfaction Survey.
- ▶ Use cases and software testing.

Strategic Account Manager

April 2000 – January 2001

Nitorum Corporation, Norwalk, CT, Software company providing web-based solution to automate and streamline the process of procuring contract staff

Manager with a variety of business development, marketing, and sales support responsibilities. Reported to Vice President of Business Development.

- ▶ Partner activities: Researched and identified opportunities for consultant and technology alliances. Made initial contact at executive level and managed relationship from product presentation with pre-sales to executive level agreement.
- ▶ Identified objectives, planned and executed executive briefings to audience of Chief Technology Officers in New York City. Partnered with Deloitte Consulting and Ariba executives.
- ▶ Managed budget and all event details from target list selection to management of demand creation efforts by internal sales representatives as well as outbound telesales. Assisted business development team with opportunity plans and pipeline reports.

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Marketing Manager

February 1999 – March 2000

Merrill/Executech, Norwalk, CT, Division of Merrill Corporation – a diversified communications and document services company

Functioned as main marketing contact to home office. Reported to Vice President.

- ▶ Managed marketing function of newly acquired subsidiary, Executech – a software developer, document management and imaging, OCR provider.
- ▶ Participated in all aspects of launch of new web-based litigation document repository system, worked with creative team to name product, outlined rollout program, managed media communications, organized product introduction to user groups, trade show expo and seminars.
- ▶ Created brochure, web and intranet content re: software products and services, repositioned electronic file discovery product. Researched, suggested and implemented new on-line seminar program allowing sales people opportunity to present service, qualify leads and develop business.

Client Services Manager

January 1994 – January 1999

Cummings & Lockwood, Law firm of 200 attorneys, estate planning and corporate law

Acted as central communication point for prospective and existing clients at one of New England's largest law firms.

- ▶ Planned and managed marketing programs: developed strategy and execution plans for seminars ranging from series of small gatherings to large semi-annual day programs with hundreds of participants.
- ▶ Responsible for integration of new Intellectual Property Group. Managed client announcement letters and promotion of new firm capabilities.
- ▶ Promoted seminars to attract new customers and maximize response. Designed invitations, announcements and managed press releases. Worked with attorneys to design visuals and hand-out materials.
- ▶ Identified key fields for practice development database and worked with systems department to create new tracking system. Designed reports and managed attorney follow-up activity.
- ▶ Planned and scheduled programs, supervised staff and managed marketing programs and budgets for series of 27 seminars within 2 ½ month time frame: 20% of new clients came from seminar program.
- ▶ Developed standards for prospective client contact to assure quality service and prevent conflicts.

REFERENCE HIGHLIGHTS

"Patty did a phenomenal job managing marketing and business development for our firm. Always composed, confident, and upbeat, she defined and organized our target lists and client database, developed new business development strategies, created promotional materials, managed prospects and client relations with the highest level of professionalism, and flawlessly planned and executed company events. She was an absolute pleasure to work with and her work positioned our firm for a great future."

"Patty developed and implemented individually tailored marketing strategies for various practice groups. She is diligent in her efforts to target potential clients and focused on larger institutional clients to increase the scope of services."

"Patricia brings experience, energy, and dedication. She made a very positive and marked contribution to our marketing program in a short time."

"Patty has a depth of knowledge and experience with regard to client development matters. Her judgment is sound and her demeanor always cheerful. I respect her as a person and I respect her observations and advice."