



LAW FIRM
INTRODUCTORY
P A C K E T

OVERVIEW

Piedmont Avenue Consulting, Inc. (www.PiedmontAve.com) works with law firms and businesses of all sizes to design creative marketing strategies and initiatives to expand brand awareness and strengthen customer loyalty efforts both with traditional methods and by leveraging new technologies.

We bring a **comprehensive approach** to enhance new and existing businesses by advising on business planning, go-to market planning, marketing and sales strategies, product branding, and technology integrations enabling our clients businesses to grow new customer bases quickly and retain long-term relationships.

Together we develop a successful plan and streamline current systems to successfully manage and maintain current and new business campaigns for sustainable increased marketplace presence and revenues. We offer advice and strategic consulting to our clients on a wide range of topics and services. We meet with clients to review the aspects of the business in which the client need assistance and provide clients with the resources and knowledge to create new and improve upon existing strategies.

We teach and transfer our skills in brand formation, business expansion, lead generation, event management, technology implementation, website enhancement, customer outreach/retention through social media and email marketing, and more to our clients. We work with companies to develop and implement growth strategies. We then train current client employees or assist in the hiring process to recruit any staff needed. **We introduce clients to the different resources** that will expedite processes or increase business growth or marketplace presence. This includes introducing clients to **our vast network of professionals, strategic partners** and other services that the **client will receive at discounts because of our relationship.**



OUR APPROACH

Piedmont Avenue Consulting, Inc. believes all work is best done through a **collaborative process** and we look forward to working directly with you to achieve your desired outcomes in a timely manner. Our consulting and marketing services are based on **offering new ideas and encouraging creative initiatives**. This process involves providing focused feedback with a plan of action to achieve ultimate success. We take a direct hands-on approach and guide clients to ensure the business and marketing strategies are completed quickly and efficiently. We then work closely with clients to **transfer knowledge and advise on implementing new processes that can be subsequently performed by client, their employees or other outside resources**.

To many of our clients, we are seen as their **Chief Marketing Officer** or **Director of Business Development and Partner Relations**. Like any executive officer **we do not focus purely on marketing, sales or social media and look at the entire business with our over 20 years of experience** working with people and law firms like yours.

Because we are not your employee, we are able to bring an **outside perspective and are paid in a manner that reinforces this**. In addition, we have worked with a diversity of organizations and owners across all industries, started countless businesses (including several of our own), dramatically grown businesses, saved business, closed businesses correctly and sold businesses. This wealth of knowledge is invaluable and clients are paying for someone with expert skills and experience to teach you the best practices for your business and what issues to avoid. This is why **we are very selective in which clients we work with and spend time during our intake process to ask the hard questions** to best understand your goals and commitment. We typically work with clients for over a year.



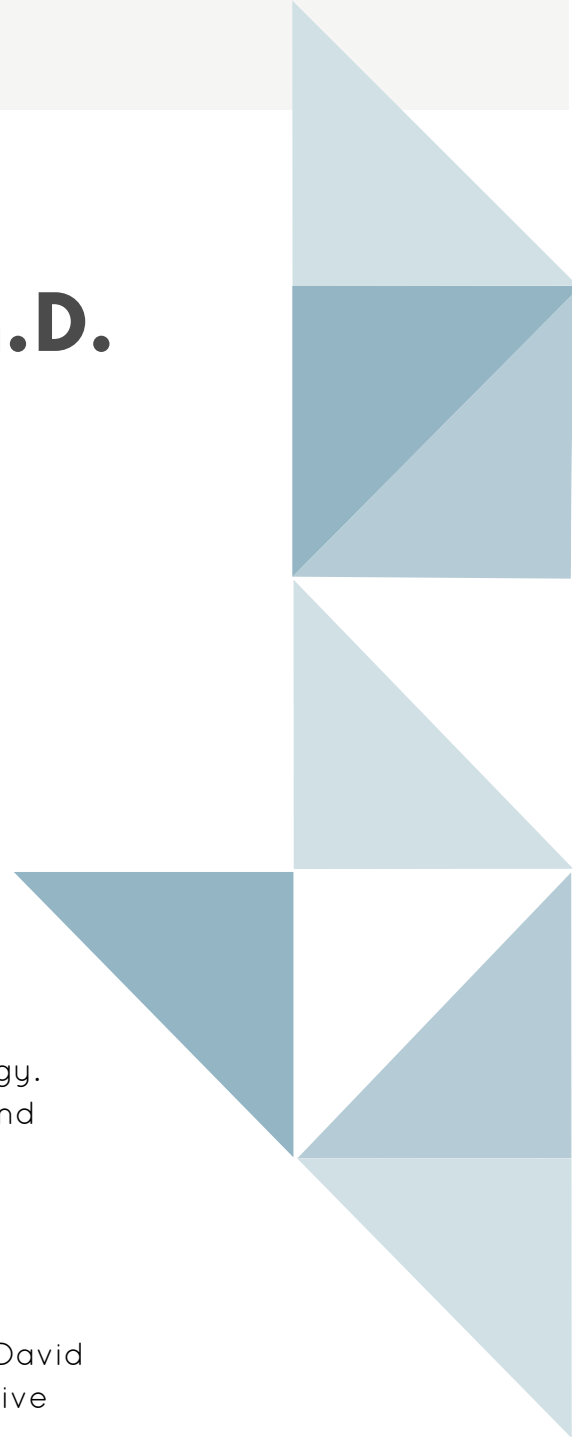


DAVID MITROFF, Ph.D.

Piedmont Avenue Consulting, Inc. (www.PiedmontAve.com) was founded by David Mitroff, Ph.D., to meet the growing needs of the consulting relationships he has built with organizations and business owners in the San Francisco Bay Area and beyond over the last 20 years. Dr. Mitroff has held numerous consultative sales and technology positions, along with co-founding three companies, covering diverse environments including technology, business, legal, financial, retail, restaurant, government, academic, and health care. His extensive education includes a Doctorate Degree, Masters, and Bachelors, in Clinical Psychology with additional coursework in law and business administration, providing a foundation for excellent critical and analytical thinking and business strategy. Dr. Mitroff is also an Instructor who teaches entrepreneurship and marketing courses at University of California, Berkeley for the International Diploma Program and is a Google Mentor for the Google Launchpad Accelerator program.

These comprehensive experiences, along with an extensive network of contacts are uniquely leveraged and differentiate David from other consultants. He questions assumptions, offers creative ideas, and encourages new initiatives from strategy through implementation, from company formation to enhancing an existing organization.

Dr. Mitroff has been a featured media expert on numerous issues related to business and marketing on television (NBC Bay Area), radio (KGO), newspapers (San Francisco Chronicle, Oakland Business Review, San Francisco Business Times, Huffington Post) and magazines (San Francisco Magazine, California Lawyer, Forbes, Inc. Magazine, Entrepreneur) to name a few. David is a sought after speaker and workshop leader on a wide range of topics from social media to peak performance. Through his consulting, lectures, trainings, and keynotes he has educated more than 25,000 business owners.





MORÉA POLLET

Moréa Pollet is the Operations Manager and Marketing Specialist at Piedmont Avenue Consulting. She uses her knowledge and experiences to implement and develop systems and strategies to generate results and help companies grow and meet their goals.

Moréa grew up in Cannes, France, where she was first exposed to Marketing and Events. She graduated with a Bachelor's in Marketing at age seventeen. Then drive to increase her knowledge she continued her study by joining SKEMA Business School and San Francisco State University where she received a B.S. in International Business School from both institutions. During her college years, Moréa held positions in the tourism, hospitality, and event industries.

Prior to working at Piedmont Avenue Consulting, Moréa worked for an Award Winning Full-Service Marketing Agency, where she developed her brand awareness, events and social media strategies for clients. Through her personal and professional experiences abroad she gained insights that allow her to be a well-rounded business and marketing professional.

OUR TEAM



**DYLAN
DENICKE**
Consultant



**BRENDA
LIU**
Marketing & Events
Coordinator

**MICHELE
DURYE**
Consultant



**ANAND
PATEL**
Consultant



OUR CLIENTS

Restaurants and Food

Ben & Jerry's
Eleve Restaurant
Goat Hill Pizza
Bistro Unique
Citra Grill
Cafecitos Cafe
Grill 'Em Steakhouse
GAN Restaurant

Retail and Franchises

T-Mobile
Orange Theory Fitness
Fashion Knit
Robotics For Fun
GNC
Jeffrey's Natural Pet Food
California Closets
Holiday Inn Express & Suites

Tech and Startups

Starrforce
Young Money Manager
Constant Contact
CitySolve UrbanRace
Pub Triva Nerds

Professional Services

Sandler Training
Action Coach
Va De Vie Events
Patrick Schwerdtfeger
Mass Mutual
Liberty Tax
Better Homes and Gardens
Regus
Weyand Law Firm
McDowall Cotter, APC
Axis Construction
Vision Dynamics
Moler Barber College

Nonprofit and Government

Oakland Metropolitan Chamber of Commerce
Small Business Development Centers (SBDC)
Includes: Alameda, Contra Costa, San Mateo, San Francisco, and Santa Clara Counties
Diocese of Oakland
Includes: 70+ Catholic Churches and Schools, East Bay Catholic Charities, Cathedral Events
Contra Costa Black Chamber of Commerce
Hispanic Chamber of Commerce, Silicon Valley
YMCA



TESTIMONIALS

"David has helped me so much with all facets of marketing and business development. With his help, our company has seen tremendous success due to his sage advice and techniques. David is so positive, smart, hardworking, resourceful and earnest. He is my go-to person when I hit obstacles and he always helps me find a way around them. I highly recommend his services to anyone who wants to grow their company and increase sales. He is much more than just a consultant. He is a coach and friend."

Katherine Trout
*Director of Marketing
& Business Development*
Axis Construction



"David is extremely knowledgeable, very skilled in working with people, and generally an all-around "good guy." He's also a creative — and effective — worker, and someone any company would benefit from."

Loyd Auerbach
M.S.



"I first worked with David while at Jackson & Wallace LLP [...] My experience with David's services was excellent. He was always responsive to numerous questions; his answers and guidance were of the highest quality. You would want to have David on your team."

Stan Lewandowski LL.M.
Attorney at Law



"McDowall Cotter started working with David Mitroff in mid 2015. Right away things started to happen. We have managed to fill up our seminar rooms again, he has found us great new staff to run our marketing department, and business is booming. More than a marketing consultant, he is also a business confidant, helping us keep course on our goal to growth. David and his team have been so responsive, barely 24 hours passes and we get an email back to a question, or a phone call for discussion."

David Rosenbaum
Partner
McDowall Cotter



"David... was extremely helpful, and the most responsive consultant I've ever worked with. If he didn't know something, he had no problem acknowledging that, and calling in an expert. He even made sure that questions that were referred elsewhere got answered in a timely manner. His follow-up was absolutely impeccable."

Judith Szepesi, J.D.
Partner
Blakey Sokoloff Taylor
& Zafman, LLP



"David was very helpful with structuring online marketing for my business. He presented clear ideas and strategy that was totally relevant for my dental office. His innovative thinking helps me to think outside the box."

Amanda Backstrom
Owner, Dentist
Artesa Dental




OUR WORK





List of Typical Problems or Issues That Businesses Encounter

(Check the ones that apply to you or your business)

- Not serving your customers need as best as you can
 - Having trouble reaching your target audience
 - Not creating enough brand awareness through an online presence (Internet marketing, social media, etc.)
 - Setting the wrong priorities/goals
 - Wish had an effective customer loyalty program to increase return customers
 - Difficulty growing your business or developing a profit
 - Frequently hear, “I have to think about it” or “I’ll come back” or “Maybe”
 - I’m not effective at creating a business plan that is followed
 - It’s taking longer than expected to build, establish or position your brand
 - Need to increase the retention of employees and new hires
 - Can’t reach multi-dimensional growth
 - Having trouble identifying potential strategic partners or investors
 - Not creating enough buzz or word-of-mouth about you or your company
 - Haven’t created a 12-month marketing plan
 - Unclear what an effective marketing budget is for my business
 - Difficulty entering new markets and/or generating growth in existing markets
 - Need to improve your sales closing rates
 - Difficulty educating clients about your products/services
 - Don’t have a systematic way to train employees properly
 - Unsure if sales and marketing data is accurate
 - Wish you had an effective Customer Relationship Management (CRM) system
 - Not creating the level of customer satisfaction you desire
 - Relying solely on referrals for business
 - Difficulty managing your reputation
 - Need to improve access or ways to leverage technology
 - Other challenges not listed:_____
- 

TIMELINE

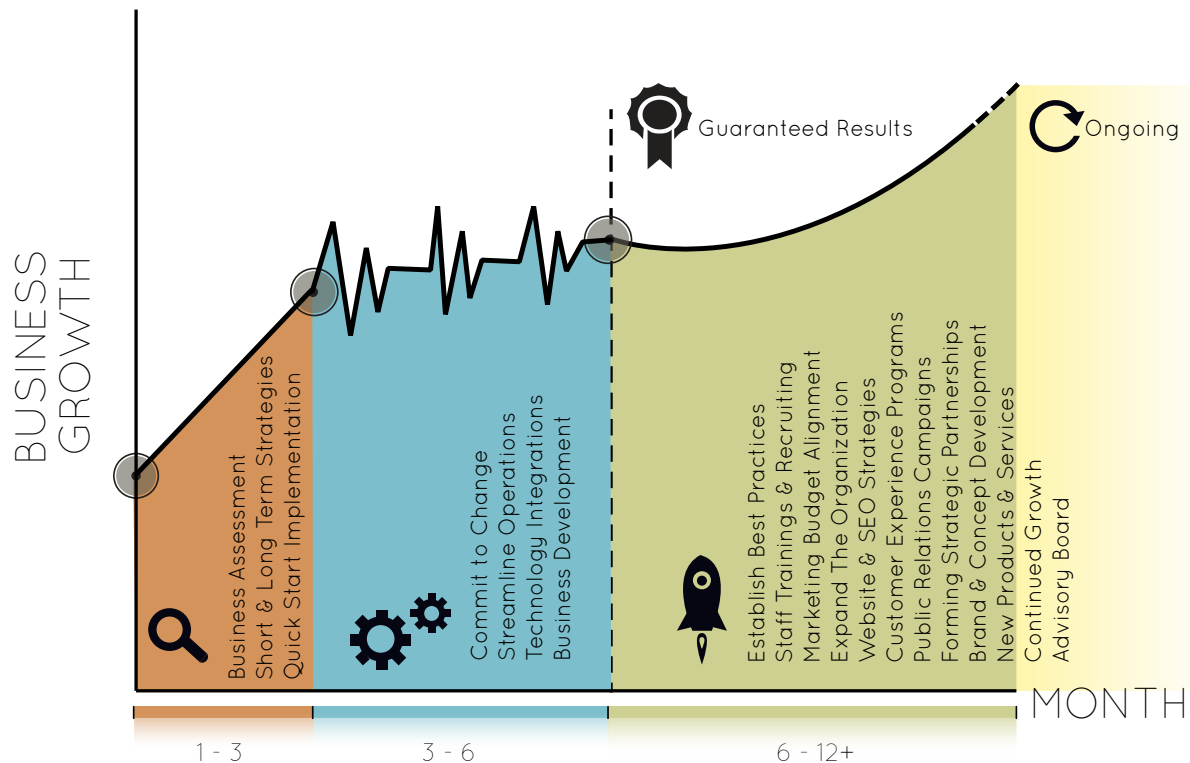
& FRAMEWORK OF WORKING TOGETHER

We value and pride ourselves on having lifelong relationships with our clients and a large part of our business is ongoing consulting with our current clients and overseeing new initiatives for continued growth or to resolve issues as they arise.

The first step of our consulting relationship is to complete the Comprehensive Assessment – Develop the Strategic Roadmap, which sets the framework for the next twelve months of consulting services. We typically work with clients for a year or more.

With this Roadmap we establish clear client goals and work together on specific objectives with outcomes and timing, contributing to client success. In addition to ongoing advisory services for business growth or assisting in resolving business issues that may arise, we typically identify 2 to 3 larger initiatives and then work together to see them completed and add new initiatives. Our online project management system, Basecamp, is also available to the client to share documents, project details and logins.

BUSINESS CONSULTING TIMELINE



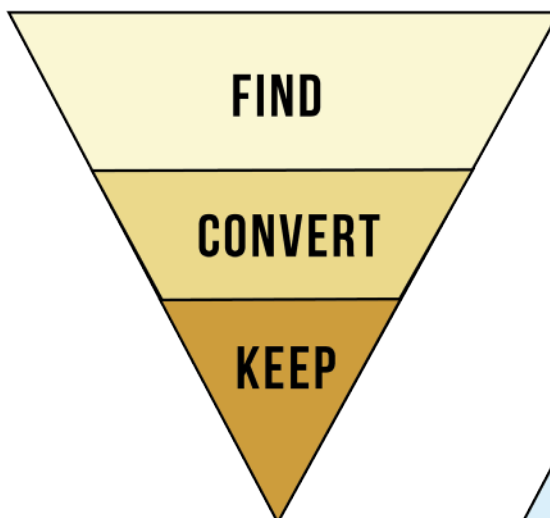
BUSINESS INITIATIVES

EXAMPLES COULD INCLUDE:

- Assessing customer loyalty program or designing a new customer loyalty program
- Evaluating social media program; creating or recommending enhancements
- Establishing or improving the current twelve month marketing calendar
- Streamline Sales Processes or Integrate Technology and Streamline a current operation
- Establish formal Customer Loyalty Program or Email Marketing
- Training employees in marketing, sales, social media, outreach or other activities
- Assisting in hiring new employees or adjusting staff roles or resources
- Advising updates to current website or assisting in evaluating proposals to have a new website developed
- Advising on customer experience and reviewing the marketplace for comparison
- Marketing Budget Alignment
- Brand and concept development
- Adding new products and services into current business model
- Forming Strategic Partnerships and other services to expand the organization

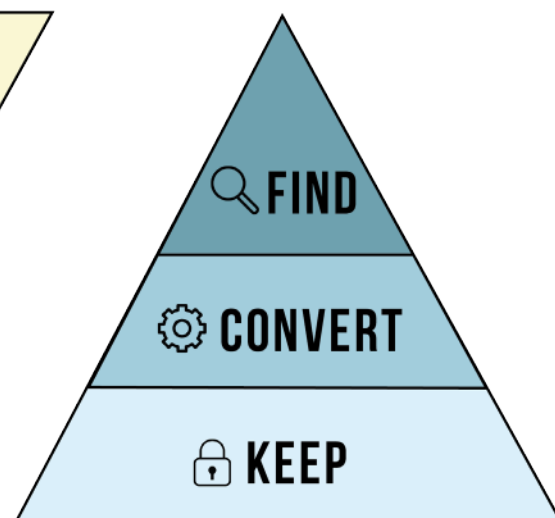
TRADITIONAL

marketing - selling - networking



ENGAGEMENT

marketing - selling - networking



DESCRIPTION OF SERVICES

INITIAL ASSESSMENT

An assessment of your business will be conducted to go over how the media and marketing strategy is implemented. The framework of the business will be analyzed and a feedback will be given. We will discuss the objectives for your business and discuss goals that need to be accomplished. If the consultation is successful we will discuss how to proceed forward with one of the following packages.

COMPREHENSIVE ASSESSMENT - STRATEGIC ROADMAP

This process involves the client completing an extremely comprehensive workbook on all aspects of their business. This is also matched with in person interviews, comprehensive business research done by the Consultant including reviewing the organizations online Web and Social Media presence, analyzing the business marketing strategies, evaluating the back office technology systems and more. This is followed by an intensive two-hour review meeting with the Client where we establish the short and long term Strategic Roadmap together. The length of the process can also increase depending on the number of employees and the size of the business.



PACKAGES

STANDARD (SILVER) CONSULTING PACKAGE

This package is designed for individuals and business owners that need more guidance and personal consultation when working to advance their own goals and to increase their business's success. The Standard package includes twice a month sixty to ninety-minute consultation meetings to discuss business and marketing strategies and to work together on projects. This time can include meetings with vendors, event development, team meetings, advising on technology, hands-on training and more. In addition, Silver Members can personally check-in with David Mitroff Ph.D. for a thirty-minute consultation as needed, to discuss their business. Consultant will also review documents emailed for advise and review. This package sets the foundation and facilitates ongoing contact to produce success. Silver Members receive exclusive invites to all Bay Area events, workshops and bootcamps that are hosted by Piedmont Ave Consulting and Professional Connector.

CUSTOM (GOLD) CONSULTING PACKAGE

This package is designed for individuals and business owners who wish to establish solid ground work and see significant change within their business or their lives. This custom program is designed to meet the client's needs and provides much more involved planning and consultation from David Mitroff Ph.D. The Custom Package is only for the committed individual or organization that is determined to see significant change and includes four sixty to ninety-minute consultations meetings a month and up to one managed event or team training workshop a quarter. In addition, Gold Members can personally check-in with David Mitroff Ph.D. for a thirty-minute consultation as needed, to discuss their business. Consultant will also review documents emailed for advise and review. This package also includes more hands on business development services. David Mitroff Ph.D. will assist with talking to vendors, venues, strategic partners and more to make sure business objectives are surpassed.

The custom consulting package can also be designed to include working on-site for clients, traveling to conferences or meetings to represent the client, and more. This package will make a difference in your business, the marketplace and your lifestyle. Gold Members receive exclusive invites to all Bay Area events, workshops and bootcamps that are hosted by Piedmont Ave Consulting and Professional Connector and will be listed as a key sponsor for events that are appropriate for the Clients business development and marketing presence needs.

ADVISOR PROGRAM, MAINTENANCE PACKAGE

This package is only available to clients who have previously completed a comprehensive consulting program with us and includes ongoing strategic advisory, partnership development and support services. Typically includes once a month check-in meetings to review all aspects of the business and offer insights and feedback on current and long-term business operations, marketing, sales, business development, partnerships and more.

The advisory services agreement and ongoing Client financial investment allows David Mitroff Ph.D. to specifically set aside time and resources to continually assist client with introductions to vendors, strategic partners and more to make sure the client's business objectives are surpassed each month. Being on a paid maintenance plan with us allows for you and your company to be top of mind and for us to be able to bring solutions and introductions to you on an ongoing consistent basis. We are proud to have most of our previous consulting clients on this plan because of the previous results and ongoing current value we provide.

All advisory clients are invited to attend any of our events, bootcamps, workshops and are introduced to others as our client to quicker facilitate new business and partnership opportunities. Clients in this package are often listed as sponsors or asked to be part of panels at larger events that fit with the Clients marketing and business outreach efforts.

CASE STUDIES

Since 2009, we have been working with the owner and founder of a San Francisco Bay Area Sandler Training office. This particular work involves social media strategies and implementation, event production and promotion, utilizing both print advertising in the San Francisco Business Times and email marketing tactics, and new lead generation for the business. In addition, we advised on the acquisition of a new training center location, and we continue to provide business development consultation. The business opened its new location successfully and it continues to increase its profits daily.

SANDLER TRAINING, SAN FRANCISCO BAY AREA, CA

In 2008 we turned Ben & Jerry's summer corporate catering program into a year-round, profitable program. We grew the program from 20 events a year to over 700+ events a year. We created new print marketing materials with matching online Social Media content, including a comprehensive Yelp, Facebook, and Google Local campaign. Finally, we coordinated the production of a sales video, and implemented programs to manage their business sales process and we continue to advice on creative email promotions, customer loyalty, and front-of-mind marketing.

BEN & JERRY'S, NORTHERN CALIFORNIA

Our team works with McDowall Cotter, a San Mateo law firm, to leverage Social Media and other digital tools to increase new and repeat meetings and cases. We also create events to generate brand awareness along with other platforms and applications. We create strategies for Online Presence, including Yelp, YouTube, Twitter, and other websites to increase the number of customers, number of events, and overall business results, enabling the Client to have a successful year-round business with long term sustained growth and opportunities for expansion. Another business initiative we saw through was dramatically expanding their community presence and creating local awareness that they are a leading law firm in San Mateo and the San Francisco East Bay. We also assist in hiring and training new paralegals, as well as implementing operational systems to streamline productivity within their firm.

MC DOWALL COTTER, APC, SAN MATEO, CA

Since 2010, we have worked with Starrforce and their founder Darren Starr to create new marketing and sales campaigns, increase Social Media presence, and facilitate strategic partnerships. This included consulting with Starrforce to help them create new packages for their offerings and strengthen brand awareness for their Salesforce.com support and implementation services. Consulting solutions range from the technical advise on Searching Engine Optimization (SEO) to the practical of attending industry conferences to meet with and build new partnerships. We also assisted on best practices and strategic partnerships, and on hiring and onboarding of new employees. We continue to work with Starrforce to promote their business and generate new partnerships.

STARRFORCE, LAFAYETTE & WALNUT CREEK, CA

Since 2010, we have worked with Eleve to leverage Social Media, including Facebook, to increase new and repeat reservations and event bookings. We work with Eleve to continuously expand their marketplace presence and create local awareness that they are a leading restaurant, bar, and event space in Walnut Creek and the San Francisco East Bay. We strategize their Social Media, including Facebook, Yelp, Youtube, Twitter, and other online presences to increase the number of customers, number of events, and overall business results, enabling the Client to have a successful year round business with long term sustained growth and opportunities for expansion. We create public relations, press releases and work closely with the Diablo Magazine, San Francisco Chronicle, East Bay Express, and other publications and online marketing sources to ensure that Eleve's message is clear and promoted. Eleve has won and continues to win numerous awards and mentions in Diablo Magazine, OpenTable, and Yelp.

ELEVE RESTAURANT, WALNUT CREEK, CA

Our team's work with Orange Theory Fitness includes assisting in the hiring and training of new employees as well as assisting with sales and marketing training. We see this through by facilitating within the on-boarding process of screening applications and conducting interviews. Most importantly, we assisted with choosing the new Pinole location and researched the leasing opportunities in the San Francisco Bay Area. By creating a marketing strategy and systems for the new opening, we were able to advise the project management while working with upper management on bigger company objectives and goals.

ORANGE THEORY FITNESS, PINOLE, CA

REFERENCES

McDowall Cotter, APC

David S. Rosenbaum
Partner
2070 Pioneer Ct.
San Mateo, CA 94403
Email: drosenbaum@mcdlawyers.net
Phone: 650-572-7933

DeCardenas Law Firm

Antonio DeCardenas
Partner and Owner
1 Sansome St #3500
San Francisco, CA 94104
Email: adc@decarlaw.com
Phone: 855-577-6800

Weyand Law Firm

Alex Weyand
Partner and Owner
540 Pacific Ave., San Francisco, CA
Email: awayand@wynlaw.com
Phone: 415-536-2856

Coit Law Group


Albert Thuesen
Owner
1700 Montgomery St., Suite 101
San Francisco, CA 94111
Email: alt@coitlawgroup.com
Phone: 415-787-2648

Axis Construction Consulting

Katherine Trout
*Director of Marketing
and Business Development*
2566 Barrington Court
Hayward, CA 94545
Email: kathi@axisconsults.com
Phone: (415) 846-2574

CONTACT US

SCHEDULE A CONSULTATION AT:

 510-761-5895

 [PIEDMONTAVE.COM](https://www.piedmontave.com)

3873 PIEDMONT AVENUE
OAKLAND, CA 94611

