

The Consulting Management Process



BLUE STONE
STRATEGY GROUP

Business Development Paths

Business Development Process Elements

1. Qualifying Prospects

- Identify the “universe” of tribes (prospects) and “qualify” the list down based on
- Assign relationships managers for each “qualified prospect”
- Small “Client Development” team that qualifies all leads and coordinates resource allocation

2. Know Ourselves: personal, team members and firms’ experience

- Inventory of firms cases and individual skill sets
- Expectations for memorized team and topics, two examples of each type of work Bluestone has done
- We add REAL VALUE, remember that

3. Know the process of “value oriented” consultative selling

- Why do tribes hire consultants?
- Archetypal Examples
- Practice the process (exercises, role plays, etc)

Qualifying Prospects

Our sales universe is the total number of tribes, plus tribal entities plus businesses interested in Indian Country

Our Prospects are:

- There are 562 tribes, 224 gaming.
- There are x tribal entities (biz boards, etc)
- There are x businesses interested in Indian Country

Our Qualifications are:

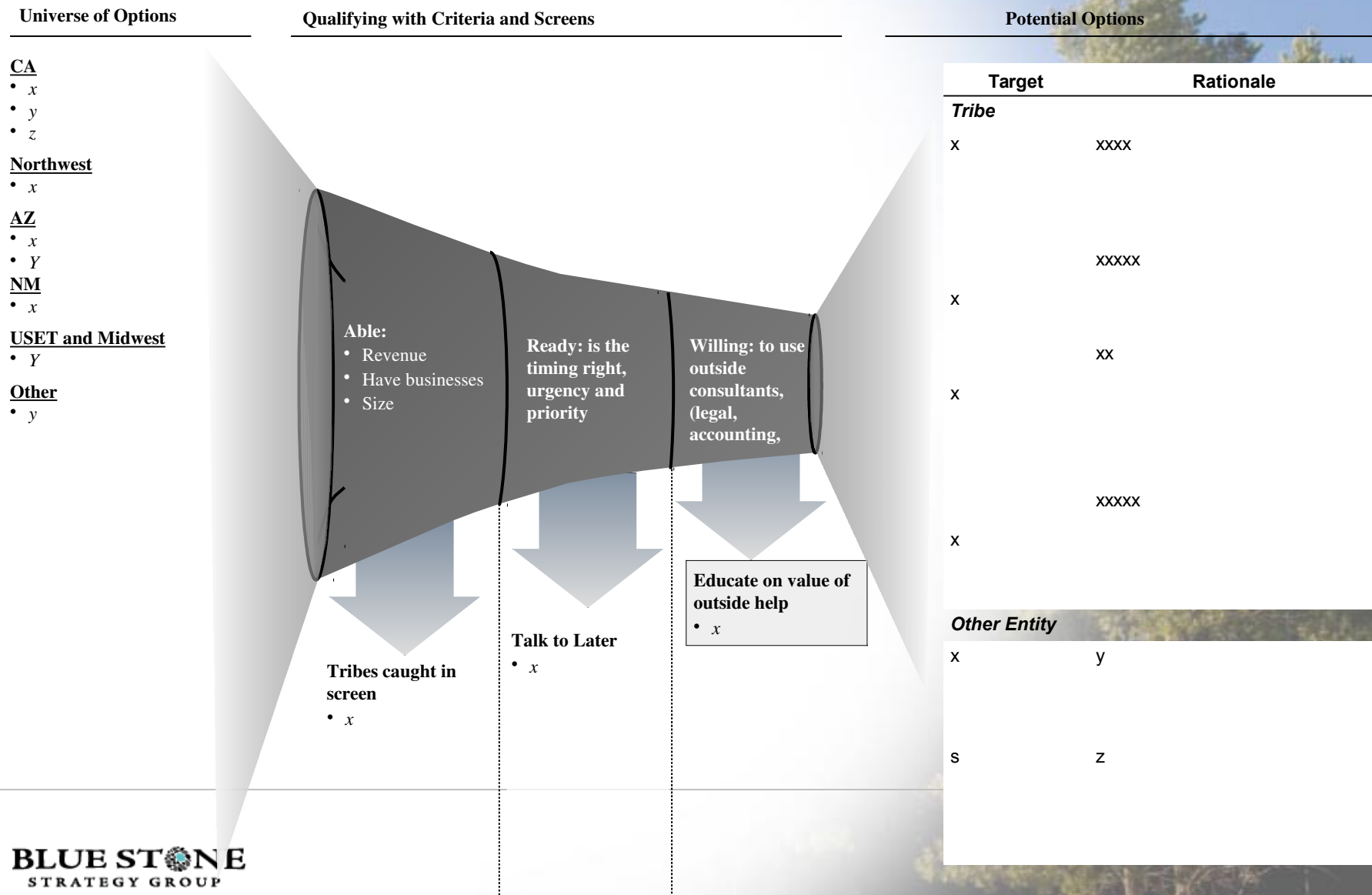
- Able: are they large enough, have enough funds to pay for our services?
- Ready: is the timing right, do they have a need that has some urgency and there is a priority for decision makers?
- Willing: do they use outside consultants, is that something on some level they are familiar with (legal, accounting, etc)?

We only proactively target “Qualified Prospects” (harvest relationships with, be on the look out for at conferences etc) based on the above criteria

We Start with those we already have relationships with

Our goal is always to focus on leads that will convert to a project within 6 months

Qualifying Prospects: the Funnel



Managing Client Development

Each qualified prospect should have a “client manager” or person with the primary responsibility of gathering formation and targeting

Our small client development team will guide overall firm targeting and resource allocation

- Conference Planning
- Advertising
- RFP trolling
- Qualify leads
- Manage client development team
- Universe refining
- Cost of sales/RFP assessment:
 - Time, Resources and Likelihood of Success

Know The Role of Marketing

Marketing is designed to generate firm awareness, nothing more, nothing less

Air Cover: advertising and conference sponsorship are designed with two goals

- “Push” information about our firm out to the public
- Make introductions “warmer” for new relationships (ie we want the response, “sure I see you guys everywhere, I heard of your company etc)
- To create “pull” such that tribal leaders come to us with a desire to discuss how our firm can help them (not this is generally rare)

Leave Behinds: brochures, letters, and cases and such are meant to be supplementary material that we can leave behind after meetings and/or incorporate into our presentations.

- More “sticky” so that we are remembered
- Connected in peoples minds to various tribes we’ve worked for

Marketing for advisors (lawyers, accountants, us) is usually based on relationships building: meals golf, etc.

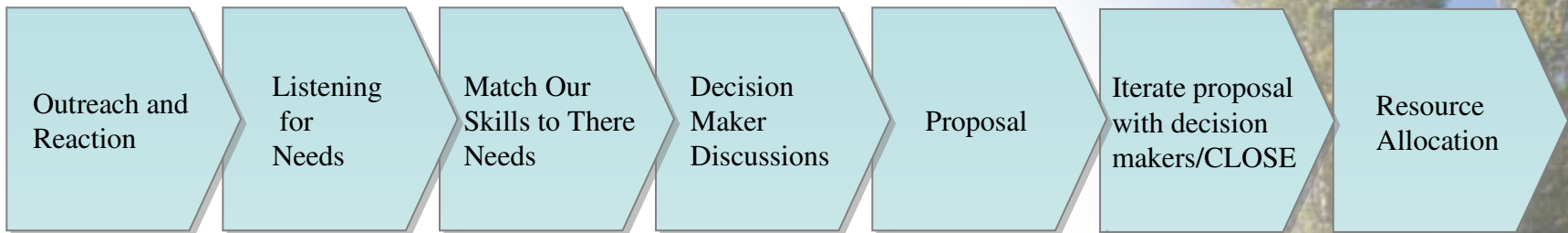
The best marketing in the world won’t bring us clients, and its expensive!
It is only designed to help our partners, not be a substitute for them

Value Oriented Personal Business Development

Client Development

Relationship Development

Project Development



What it is

- Targeting decision makers and influencers
- Understanding key issues for each tribe

What it is not

- Conferences
- Associations
- Sifting through national Trends
- New ideas

What it is

- Discussing past Blue Stone Projects
- Finding out who is the decision maker for a given project
- Typically a council, board or governor presentation

What its not

- More networking
- Pitching projects we don't do
- Over pursuing a non decision maker (Director or firm leader)

- Internal pricing and time requirements
- Matching style of proposal to style of client
- Identify and cost out subject mater experts

- Determine changes for proposal
- Identify roadblocks
- Map out Blue Stone follow up contacts
- Schedule discussion meetings
- Make initial data request

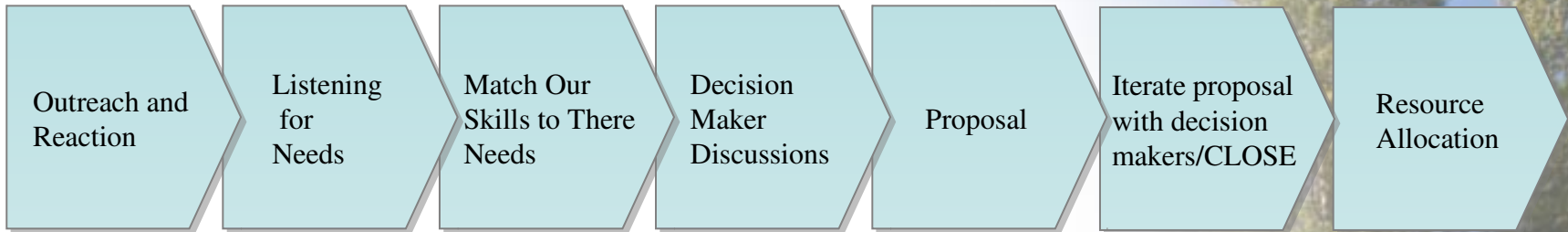
- Book administrative support
- Book subject matter experts
- Schedule primary client meetings
- Schedule internal team check ins

Current Relationship to Sale

Client Development

Relationship Development

Project Development



Alvin and Tesuque: 6 mths

- Alvin knew Governor Mitchell from his past work and from tribal proximity
- Alvin heard they had some needs that council was looking at outside help for
- Alvin arranged initial meeting with tribal council where Blue Stone general info was presented
- Blue Stone took notes of their specific needs

- Alvin and Tim explained to council how their needs (strat planning, RV store and land acquisition) were areas Blue Stone had expertise in
- Council agreed that Blue Stone should come back with a proposal on each

- Internal pricing and time requirements
- Tim and Alvin crafted proposals
- John approved pricing and timing

- Saw Tesuque at California conference and followed up
- Arranged follow meeting with Governor to iterate terms
- Identify RV project as place to start

- The project requires short turnaround
- Tim can be project lead
- Support from our subject matter experts in
- in the RV and Cstore areas

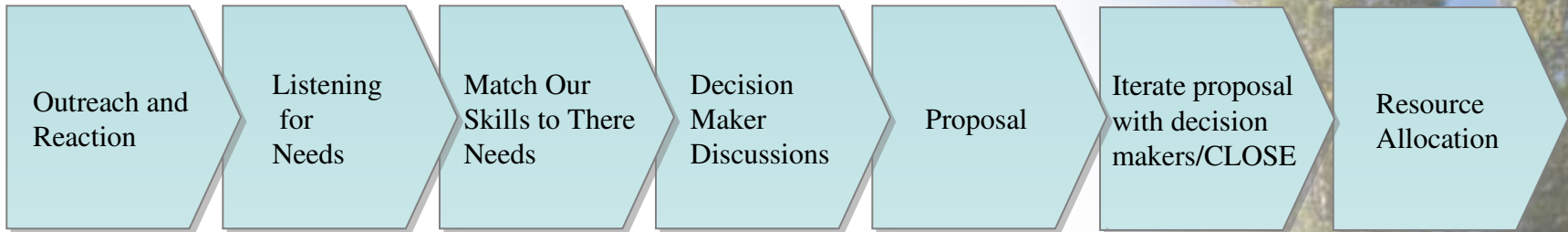
Current Relationship To Sale

Conference Meeting to Sale

Client Development

Relationship Development

Project Development



Jamie and Isleta: 3 mths

- Jamie meets President Lucero at a conference
- They have discussion about the new Council taking over at Isleta and their desire for some “help”
- Help for the president at that time was developing a game plan for the new council

- Jamie explains that Blue Stone offers that service and
- Jamie offers to come out to present to Council
- Jamie has initial meeting with the President and they agree on 1 day introduction session

- Jamie and John write a short 2 page proposal for a one day workshop
- Blue Stone hires Tim Keller and puts him on the Isleta team

- President Lucero agrees but adds more to the scope
- Blue Stone agrees but adds in a clear “commercial” for follow on work

- Tim, John, Kim and Jamie are staffed to the workshop
- Total of 3 days, on day of prep, one day of travel and one day of presenting

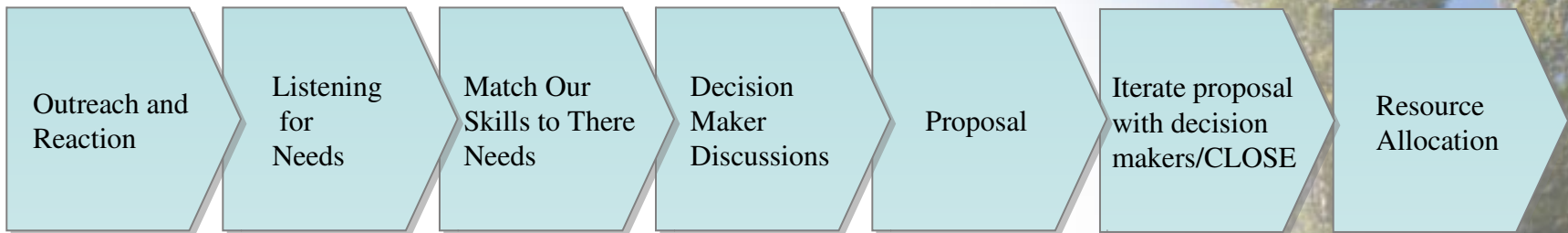
Conference Meeting to Sale

Referral To Sale

Client Development

Relationship Development

Project Development



Brian and Seminole: 2 mths

- Brian knew Tina Osceola from work at USET
- Through Brian and Tina's work, Brian began discussing Blue Stone
- Jamie and Tina reconnected separately and introduced John
- John and Tina discussed current structural situation with tribal officers

- John connected Seminole's need for a new organizational structure and strategy with Blue Stone's capabilities
- John leveraged Tina to agree to look at a proposal from Blue Stone

- John and Tina decided to break up work into modules
- The first module would also enable Blue Stone to meet the other Officers through the interview process

- John and Jim Raker iterated terms of proposal
- Tina got the officers to agree to the work
- Brian followed up with others he knew at the tribe like Joel Frank
- Jamie followed up with Tina

- Tim staffed to lead project
- Interviews would be divided up by a 4 person team to get work done faster
- Final presentation was scheduled in advance

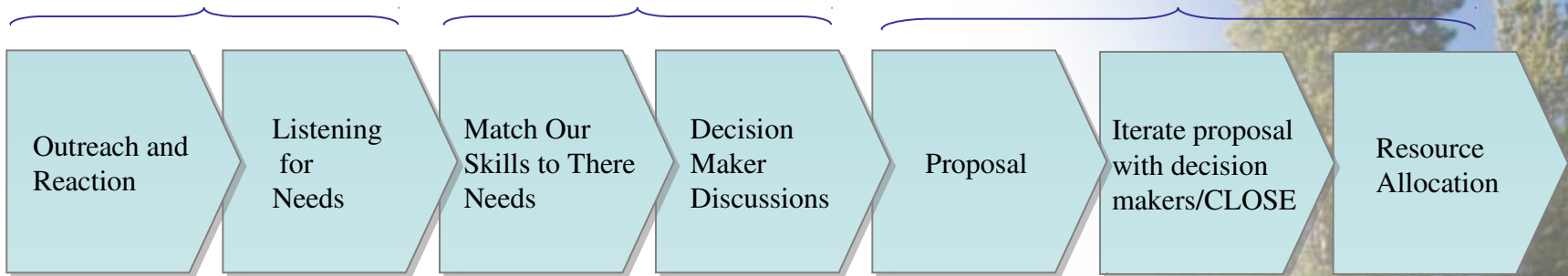
Referral To Sale

New Work form Current Client

Client Development

Relationship Development

Project Development



Tim and Isleta: 3 weeks

- Tim developed relationship while working at Isleta with Tino the Treasurer
- Tino tips off Tim that the RVs and Fun Connection are in trouble after a meeting/ in side conversation on the Cstores

- Tim discusses with John our capabilities and subject matter experts
- Tim and John consider pricing and hours in advance of bringing it up to council
- Tim and John agree to float the idea at the next council meeting after our Cstore presentation

- Council agrees to the work w/o a proposal

- Contract extension approved at the next council meeting
- Directors are notified of the new Blue Stone project

- Tim assigned as project leader
- John finds two subject matter expert for initial phone calls

New Work from Current Client

Example Qualifying Sheet

Target			Pipeline Stage									
Channel/ Industry	Partner	Prospect	Channel Partner Discussion/ Business Issues	Profile	Client Introduction	Client Meeting	Business Problem Confirmed	Scoping Letter	Client Rev	Cost	Fees	
ML - ABQ												
	Paul Gibson											
		Isleta (from jamie)	1		1	1						
		AICP										
		Sandia										
		Jicarilla Apache										

Target			Goals (status colored)			Value Potential				
Channel/ Industry	Partner	Prospect	30 days	60 days	90 days	Size	Probability of Success	Brand or Relationship Value	Follow On/ Repeat Potential	Priority
ML - ABQ										
	Armstrong									
		North Dakota Utility	client call	client intro		4	1		4	1
		EMI Technologies	re intro							
	RBK									
		Westar	follow up	client intro		3	1		3	1
		McBride - Lauderdale Marine	follow up	client intro		2	2		3	1
		McBride - Gasmart	follow up	client intro		4	2		3	2
		McBride - Arkansas Driller	follow up	client intro		1	1		2	1
		McBride - Bio Diesels	follow up	client intro		1	1		2	1
		McBride - Elosole	follow up	client intro		2	2		3	2
		Hammons Hotels	not likely			3	1		3	2
		Tishman	follow up	problem identification	client intro					
		Jack Westman	follow up	problem identification	client intro	4	3		3	3
		Community Dental	pro bono meeting							
	Paul Gibson									
		Isleta (from jamie)	follow up work	strat planning initiative		3	4		3	4
		AICP	intro	follow up						
		Sandia	intro	follow up		3	1		4	3
		Jicarilla Apache	intro	follow up		4	1		4	3

Example Status Qualifying Sheet 2

Tribe	Returning	New	Know	Opportunity	Resources	Ldrsp Term	Lawyer / Lobbyists
Taos		X	X	X		1 yr, return	
San Ildefonso	X		X	X	X	2nd of 2 yr, return	Peter Chestnut
Navajo	X		X	X	X	1st of 4 yr, prev VP	Stuart Paisano
Mescalero	X		X	X	X	2nd of 2 yr, return	Cate Stetson
Tesuque		X	X	X	X	1 yr, return	Maxine Velasquez, Charlie Dorame
Isleta		X	X	X	X	1st of 2 yr	
Jicarilla	X		X	X	X	2nd of 2 yr, return	
Acoma		X	X	X	X	1 yr, return	

Tier 2							
Tribe	Returning	New	Know	Opportunity	Resources	Ldrsp Term	Lawyer / Lobbyists
Pojoaque	X		X		X	4th 1 yr, return	
Ohkay Owingeh		X	X		X	1st of 2 yr	
Sandia		X			X	1 yr	Tom Horan,
Santa Clara	X		X	X	X	3rd 1 yr, final, return	
Laguna		X	X	X	X	1st of 2 yr	Nordhaus (Teresa Ledger), JD Bulliton
Zia	X		X	X		2nd 1 yr, return	Drew Setter
Nambe	X		X	X		3rd 1 yr, return	Peter Chestnut
Picuris		X	X	X		1 yr, return	
Zuni		X	X	X		1st of 4 yr, return	
Cochiti		X	X	X		1 yr	
Santo Domingo		X	X	X		1 yr, prev lt gov	Mark Duran
San Felipe		X	*	X		1 yr	
Jemez		X		X		1 yr	

Example Status Tracking Sheet

Tribe	Need	Next Steps	Possible Assistance
Pueblo of Isleta	1) To-Market Strategy for Lava Blocks; 2) Procurement Training; 3) Community Outreach for Constitutional Reform	1) Meet with Gov. Lujan, Lt. Gov. Torres; 2) refine SOW; 3) secure request to submit proposal; 4) develop draft proposal; 5) submit; 5) gain approval; 6) finalize agreement to proceed	Tim participate in meeting; Tim assist with drafting proposal
All Indian Pueblo Council	Strategic Planning	1) meet with AIPC to confirm interview guide; 2) define SOW and amount of time required of BSSG; 3) follow-up with Kellogg re: funding; 4) contact McCune and NMCF about supporting; 5) complete interviews; 6) analyze interviews; 7) prepare for retreat in late June	John assist with drafting SOW and amount of time needed; Tim assist with analyzing interview responses.
McCune Foundation	Econ Dev	agree on term sheet. Meeting next week.	
Sandia Tobacco Manufacturing	Tobacco Manufacturing Business	TK doing due diligence.	
Pueblo of Taos	Strategic Planning	1) Revised SOW submitted on 5/11; 2) hear response from Taos; 3) finalize proposal and costs and submit to Taos; 4) receive approval to proceed; 5) identify resources	(possibly) John / Jamie call Gov. Cordova next Wednesday to follow-up, if haven't heard; John and Tim assist with finalizing proposal; John with negotiating pricing and agreement to proceed; John assist with identifying resources