



Jeff Bloch

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Jeff Bloch is the President and Principal Consultant for Dispatch Digital Concierge based in Sayville, New York. With 19 years of customer relationship management (CRM) and digital marketing experience Jeff provides strategic consulting and digital concierge services to small and medium sized businesses across a variety of industries. He has unparalleled experience working on data change management and data quality management initiatives, developing sales pipeline solutions and integrating with some of the top third-party digital marketing platforms available.

For the past eight years Mr. Bloch's experience has focused on the accounting and legal industries. Most recently, as the Director of Marketing Technology for Goodwin Law, Jeff was responsible for a team of 6 internal resources along with two outside consulting firms including Ernst & Young. Mr. Bloch oversaw the firm's migration from LexusNexus Interaction to Microsoft Dynamics 365. The project included complex integrations with the firm's HR platform, time & billing data and extensive data migrations. In addition to overseeing the firm's CRM migration, Mr. Bloch was responsible for the firm's data change management, data quality management initiatives and a multi-million dollar budget.

Prior to Goodwin, Mr. Bloch worked for two of the largest accounting firms in the United States (EisnerAmper and Marcum LLP). In each instance, Mr. Bloch successfully revived failed CRM initiatives. It's through these experiences that Jeff ultimately designed and implemented his vision of a digital concierge. By launching a digital concierge, the volume of contacts being captured, and the quality of those contacts, were directly impacted. Ultimately, email metrics including click-throughs and event RSVPs increased dramatically.

Mr. Bloch was also the Senior Manager of Training and a senior consultant for Infinity Info Systems from 2000 - 2011. At the time, Infinity Info Systems was the largest Microsoft Dynamics CRM and Saleslogix business partner concurrently. As a result, Mr. Bloch had the unique opportunity to work across a multitude of CRM implementations, applications and client industries including over 200 different projects.

Mr. Bloch was a volunteer emergency medical technician for 10 years, an EMS Captain and sat on the Board of Directors for Commack EMS in Long Island, NY. Jeff is an avid skier and is currently attempting to become a member of the "ADK 46'ers" (people who have climbed all 46 peaks in the Adirondack Park of NY with a summit elevation above 4,000').

Subject Matter Expertise

Client Relationship Management
Marketing Technology
Software Development Lifecycle
Management
Data Change Management
Data Quality Management

CRM Platforms

Zoho CRM + Zoho One
Microsoft Dynamics 365
Lexus Nexus Interaction
Oracle NetSuite
Salesforce.com
Marketo
Hubspot
InfusionSoft
Pipedrive

Digital Marketing Platforms

ClickDimensions
Act-On
Bronto
Vuture
ConstantContact
MailChimp

Education:

Bachelor of Science, Business Marketing
State University of New York, Plattsburgh

Certifications

Microsoft Certified Systems Engineer
Microsoft Certified Trainer

Experience

- 19 years project management experience
- 19 years CRM experience including Microsoft Dynamics 365, LexusNexus InterAction, Oracle NetSuite, Sage SalesLogix and Zoho CRM.
- 8 years management experience: Digital Marketing, Professional services industry
- Director level budget, management,
- 8 years vendor management experience
- 20 years CRM consulting, training
- Former Emergency Medical Technician, New York State Dept. of Health certified (2006 – 2016), EMS Captain, Board of Directors: Commack EMS.