

# DataKey Project Overviews: Business Improvement



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## DataKey Project Overviews: Business Improvement Projects

### Revamping National Consumer Product Brand

#### Challenge

A large CPG company with a long standing national branded food franchise turned to DataKey to assist with the renovation/re-launch of the business.

#### Actions

- Conducted consumer research and determined category insights for revamping product portfolio.
- Oversaw project management of the entire packaging conversion from production line modifications to supplier management, integrating with Purchasing, Marketing, Sales, Engineering, and Finance.
- Recommended the introduction of new product formulations to capitalize on consumer trends for healthier foods, and converting to a new primary packaging structure to provide a more modern product image.
- Provided analytic support to Customer Marketing to demonstrate the retail story for increasing share of shelf for own brands versus competition.

#### Results

- **Brand re-launched successfully adding significant points of total distribution, achieving desirable shelf positioning across major retail customers.**
- **Retail sales increased +15% for 3 quarters after re-launch completed.**



### Business Improvement Project Management

#### Industry

Consumer Products, *Food & Beverage*

#### Company Size

Fortune 1000

*“The consumer insights and strategic work helped us to figure out the best direction for moving forward. Thanks to DataKey, we were able to successfully extend our brand equity from the past to the future.”*

– Chief Marketing Officer

### Optimized Pricing Strategy to Build Revenue

#### Challenge

Fortune 500 company identified \$50M+ reoccurring bottom line opportunity to capture additional revenue through structured price increases, contract improvements, and by accurately pricing value-added services. This strategic initiative would impact many Fortune 500 companies.

#### Actions

- DataKey consulted with internal leadership team to help organize a series of complex projects focused on customer segments and program objectives.
- Identified productivity tools for standardizing contract negotiation process that included executive dashboards, metrics and time-based notifications.
- Documented repeatable project structure and project plans for roll out of price increases, as well as to evaluate value-add services.

#### Results

- **Internal teams quickly aligned to project plan and timeline to ensure price increases were rolled out on-plan and anticipated revenue growth achieved.**
- **All major project implementation milestones completed on target.**
- **Introduced new project management software into the company.**



### Business Improvement Project Management

#### Industry

Business Services, *Document Management*

#### Company Size

Fortune 1000

*“Using a collaborative approach, DataKey moved this program from power point to implementation of this strategic initiative, with all major project objectives achieved. Well done.”*

– VP & Director Program  
Management

DK00201, DK00109



## DataKey Project Overviews: Business Improvement Projects

### Strategic Partner Evaluation for Hardware Integration

#### Challenge

A Fortune 100 electronics gaming company with a core competency in software was seeking a strategic partner to take ownership of design and production of the hardware portion of their product offering.

#### Actions

- Identified and profiled 12 possible partners with strategic competencies in hardware design and production, and new strategic sales channels.
- Obtained detailed information about partner capabilities and scored partners on a matrix to assess and rank potential partnerships.
- Oversaw partner introduction meetings and negotiated non-disclosure agreements to ensure confidentiality and security of intellectual property.

#### Results

- **Facilitated senior executive-level introductions to every potential strategic partner in under six weeks.**
- **Identified and focused the client on a subset of the most optimal partners through the selection process.**
- **Client was better able to refine and articulate their complete corporate business strategy as a result of the selection process.**



### Business Improvement

#### Project Management

#### Industry

Consumer Products , *Electronic Gaming*

#### Company Size

Fortune 1000

*“I was impressed with DataKey’s ability to connect us to such high quality partners in such a short amount of time.”*

– Vice President and General Manager

### Redesign Employee Performance Evaluation Process

#### Challenge

In the years following several acquisitions, a Fortune 500 company wanted to consolidate the method for measuring performance and distributing compensation aligned with performance benchmarks. To build a deep leadership team, they also wanted to identify “rising stars” in the company talent pool.

#### Actions

- Created a performance assessment and compensation process that addressed the unique challenge of the company’s diverse workforce, designed to help employees define, measure and reach their goals.
- Implemented new process, tools and management education to transform the annual performance assessment and compensation reward cycles.
- Directed corporate change management including manager-level training, senior executive communication and support, and meeting the core team project milestones.

#### Results

- **Managers are more informed and able to take an active role in managing their own performance and professional development, and their teams.**
- **Established a self-sustaining program that advanced the company’s pay-for-performance objective. Future cycles to include goal cascading from strategic company goals.**



### Business Improvement

#### Business Process Excellence

#### Industry

Business Services, *Document Management*

#### Company Size

Fortune 1000

*“DataKey moved our company forward with a program to foster accountability, as well as recognize and reward performance.”*

– EVP Human Resources

DK00211, DK00146



## DataKey Project Overviews: Business Improvement Projects

### Creation of Process to Manage Complex HR Projects

#### Challenge

The global HR organization for this large multinational Fortune 500 company needed to track and monitor a dozen critical strategic initiatives. Projects were complex and required cross-functional collaboration to successfully complete.

#### Actions

- Created a standard reporting process and project planning template for all projects, tracking progress against hundreds of milestones and monitoring risk mitigation plans.
- Summarized the status, creating an executive level dashboard report viewed on a weekly basis, and provided executive guidance monthly.
- Consulted on a regular basis with internal project managers on scope definition, project planning and risk identification.

#### Results

- **Increased the effectiveness of HR leadership by prioritizing issues, risks and resource allocation needs.**
- **Improved visibility of successful project managers, the use of best practice tools and methods within the HR organization.**
- **Helped guide on-time completion of critical strategic initiatives.**



### Business Improvement Project Management

#### Industry

Business Services, *Document Management*

#### Company Size

Fortune 1000

*“With DataKey, we were able to rapidly establish a disciplined approach to business project management that was methodical, thorough, and very effective for our team. This is why our company uses DataKey in so many areas.”*

– EVP Worldwide, Human Resources and Administration

### Guiding Rapid Integration of Acquired Businesses

#### Challenge

Simultaneous integration of two acquired companies with an existing Fortune 500 corporate business unit was needed within an aggressive timeline. The goal was to achieve full organization integration with consistent business processes and improved management visibility.

#### Actions

- Created a cross-functional team to establish an integration timeline and project plan that would achieve results in the shortest time possible.
- Facilitated a weekly team review of the project highlighting key milestones, progress and risks.
- Focused teams at three levels – tactical face-to-face activities, management decisions, and executive alignment – to maximize productivity and enable rapid change.

#### Results

- **Completed the integration within the time window for all major business operations.**
- **Ensured satisfaction by meeting critical transition milestones on time.**
- **Documented a baseline integration project plan and constructed a written management guide for future acquisition projects.**



### Business Improvement Project Management

#### Industry

Business Services, *Document Management*

#### Company Size

Fortune 1000

*“DataKey masterfully project managed the business process integration of two acquired companies within a short time window. They helped drive the results we needed.”*

– EVP Human Resources

DK00121, DK00177



## DataKey Project Overviews: Business Improvement Projects

### Effective Marketing for New Technical Product

#### Challenge

The Innovation Center in a Fortune 100 Telecom developed a new product concept and was ready to share the idea with potential partners and customers. The technical team lacked the product marketing capacity and capability needed to design the initial marketing and sales collateral.

#### Actions

- Shaped key messaging to describe market needs, product benefits and enabling technologies.
- Created product and technology overviews to inform non-technical internal audiences.
- Developed a complete portfolio of product marketing materials for potential customers, partners, tradeshows and events.

#### Results

- **Drove clarity on the new product concept communicated throughout the organization.**
- **Successfully engaged target partners and potential customers using the marketing materials.**
- **Executive team next engaged DataKey to create a comprehensive business plan for the new product. Market opportunity in excess of \$500M.**

### Competitive Compensation Design to Drive Culture

#### Challenge

A well-known consumer fashion brand was facing multiple consecutive years of negative profitability in retail stores and realized that a true sales culture would be needed to improve the customer experience and expand revenue. After failing in the past to implement a commission-based compensation structure, outside help was needed to design a plan in 30 days that would drive the necessary cultural change while minimizing financial risk.

#### Actions

- Undertook an accelerated-pace competitive study to benchmark industry compensation structure and the brand's competitive positioning.
- Distilled complex strategic best practices into a nuts-and-bolts commission plan designed to reward individual performance while building a collaborative sales-driven team environment.
- Modeled in-depth financial projections and evaluated 50+ outcome scenarios to find the optimal balance of risk and reward.

#### Results

- **In one month, achieved four major milestones delivering commission structures at increasing levels of granularity, enabling client to improve the Board's confidence while setting realistic expectations for change.**
- **Board approved the launch of a 5-month pilot program projected to net an additional \$2M in revenue while reinforcing a sales culture.**



#### Business Improvement

New Product Development

#### Industry

Technology, *Telecommunications*

#### Company Size

Fortune 1000

*"DataKey got more done than we could have ever done by ourselves. We would not be moving this \$500M project forward without the assistance from DataKey."*

– CTO & Vice President, US R&D



#### Business Improvement

Project Management

#### Industry

Consumer Products, *Retail Fashion*

#### Company Size

Fortune 1000

*"DataKey, you did a FANTASTIC job pulling this together. You accelerated your deliverables to meet our time demands without sacrificing quality at all. We are ready to move forward - thank you for your team's efforts."*

– President of Retail Sales for nearly 1000 US concept stores

DK00209, DK00238



## DataKey Project Overviews: Business Improvement Projects

### Acquisition Integration - HR Project Management

#### Challenge

An acquisition adding thousands of employees to a global organization was stretching the capacity and capability of the internal HR team. The complexity of this large an integration had never been attempted by the organization before, and the timing and execution of this acquisition integration was essential.

#### Actions

- Collaborated with each of the team subject matter experts to develop a comprehensive project plan with nearly 1000 line items to be completed in less than 90 calendar days.
- Tracked milestones, critical path and risk within each HR area including onboarding, payroll, compensation, international benefits, and legal.
- Drove rapid pace and weekly summary reporting to the overall integration executive board showing the level of risk in schedule, resources and budget.

#### Results

- **The HR team remained focused and met all provisions and commitments in the acquisition legal agreement on schedule, hitting all of the major milestones and meeting all strategic project objectives despite significant information gaps and technical challenges.**
- **Executive team applauded the ability to overcome risks and setbacks.**



### Business Improvement Project Management

#### Industry

Healthcare, *Medical Manufacturing*

#### Company Size

Fortune 1000

*“DataKey drove the project plan from design all the way through a tremendously successful close date. Their project direction and guidance has been invaluable. DataKey is now facilitating a smooth transfer of all the associated project management tools to us so that we may continue internally.”*

– Vice President HR

### Complex Enterprise Project Management with Outside Vendors

#### Challenge

The company was transferring their stock plans from one vendor to another. Subject matter experts were carefully managing their individual areas, yet the company wanted to have someone watching out for the organization’s overall interests, safeguarding the project timeline and proactively identifying risk.

#### Actions

- Managed the internal alignment of key areas – legal / policy, technology, communications, payroll and financial reporting.
- Focused on the proactive identification of risk, monitoring mitigation plans.
- Worked with outside vendor to identify critical milestones and to manage unforeseen impacts from other parts of the organization.

#### Results

- **Stock plan was converted on time to meet the company requirements, even though there were unexpected events that occurred within the organization, including a first ever dividend payment and a complex acquisition integration.**
- **The team remained focused and aligned on the desired outcome, confident that the risks and obstacles could be overcome. Because changing the timeline was not an option, the PM led the team to actively recruit additional resources and scrutinize the scope of the project activities.**



### Business Improvement Project Management

#### Industry

Business Services, *Document Management*

#### Company Size

Fortune 1000

*“DataKey knows how to ask the right questions and keeps their eyes on the road ahead so that we can get the job done. DataKey makes our internal support groups shine in the eyes of the executive team.”*

– Vice President HR

DK00249, DK00157



## DataKey Project Overviews: Business Improvement Projects

### Building a Comprehensive Private Brand Business Plan

#### Challenge

A multi-billion dollar distribution company was looking to improve their margins and shareholder value by expanding their private brand product platform. This company turned to DataKey to play the vital role of Project Manager, a six month company-wide engagement that integrated Sales, Marketing, Product Management, Operations, IT, and Finance to build a plan that would add several hundred million dollars of annual revenue for the company.

#### Actions

- Facilitated 8 full day large scale team integration meetings during the course of the engagement to ensure proper project direction and functional buy-in.
- As Project Manager, DataKey created a comprehensive project plan, tracked project status, prioritized action items, built communication materials, identified critical path and primary risks to the project success, and communicated risks and risk mitigation plans to project sponsors.

#### Results

- **Created full team multidisciplinary commitment and accountability to business plan success to meet all major project milestones.**
- **Go-forward business plan to dramatically expand Private Brand investment accepted. Projections are for \$300M annual increased revenues.**



### Business Improvement

#### Project Management

#### Industry

Industrial Distribution, *Industrial Products*

#### Company Size

Fortune 1000

*“We thoroughly enjoyed working with DataKey. Amie Gray as Project Manager has just the right blend of no-nonsense approach, technical expertise, tools capability and overall extraordinary project management skills.”*

– Vice President of Product Management

### Enterprise Project Management for APD eTIME Deployment

#### Challenge

A significant hourly field workforce had been developed over years of acquiring smaller, local companies. Each region and location operated a different time keeping system. The company decided to unify pay policies and practices and automate time keeping with APD’s Enterprise eTime, and they were struggling to stay on schedule.

#### Actions

- Took over as Project Manager and implemented a structured methodology for tracking project status and prioritizing action items.
- Aligned technology, training, communications and support project plans around the field employee touch points.
- Identified the deployment critical path and primary risks to the project success and communicated risks and risk mitigation plans to project sponsors.

#### Results

- **Focused the team and sponsors on ensuring the critical path activities were accomplished on schedule.**
- **Led the team through the project to successfully enroll 9,000 hourly employees on eTime. Achieved all territory go-live dates on schedule.**
- **eTIME enabled the organization to continue driving standardization across the company to significantly reduce payroll processing time, improve pay accuracy and provide enhanced management reporting.**



### Business Improvement

#### Project Management

#### Industry

Business Services, *Document Management*

#### Company Size

Fortune 1000

*“Without DataKey as the Project Manager, we would not have been able to drive the value of eTime and improved management practices into the organization in such a short timeframe.”*

– Vice President HR

DK00234, DK00086



## DataKey Project Overviews: Business Improvement Projects

### Building Consensus on Go-To-Market Plans

#### Challenge

A food and beverage ingredient and technology firm was seeking strategic assistance in determining which new markets to target as well as the marketing strategy for entering those segments.

#### Actions

- Thoroughly researched business segments for possible market entry, profiling 7 different categories for market introduction.
- Determined the strategic criteria for selecting target categories and created a revenue model to forecast the potential value.
- Developed marketing materials and go-to-market plans for implementing the product introduction into new business segments.

#### Results

- **Developed sales process for implementation across additional target business segments.**
- **Achieved consensus among management team about business segment priorities and product introduction roadmap for the organization.**
- **Marketing plan filled a robust opportunity pipeline which ultimately resulted in a 5-year, category-exclusive supply agreement worth multi-millions of dollars.**



### Business Improvement

#### Industry

Consumer Products, *Food & Beverage*

#### Company Size

Mid-Market

*“We were able to focus our resources behind a clear, data-driven market entry plan. The business results and ROI were well-beyond our expectations.”*

– President and Chief Operating Officer

### Enhancing eCommerce and Web Presence

#### Challenge

A janitorial supplies and equipment distributor sought to increase its online presence and e-commerce functionality by bringing a decade-old website into the 21<sup>st</sup> century.

#### Actions

- Studied the competitive landscape of websites and e-commerce capabilities to take full advantage of competitors’ strengths and weaknesses.
- Researched customer segments and product lines to develop strong messaging that would resonate with target customers.
- Partnered with a search engine optimization firm to assist in the development of the structure and content of the website and drive the messaging.
- Assisted in the production of the website by guiding the design vendor.

#### Results

- **Created a modern online presence for the company that both impressed customers and improved their use of e-commerce.**
- **Optimized the content of the website to grow hits and rank the client higher among the major search engines, including many #1 Google hits.**
- **Facilitated the potential improvement of margins by making it easier to transition the client’s customers from phone orders to e-commerce.**



### Business Improvement

#### Industry

Industrial Supply, *Janitorial Supplies & Equipment*

#### Company Size

Mid-Market

*“DataKey did an amazing job of transforming our old website into a commerce site that we are proud of. We are now eagerly promoting our website to our customers, which will improve our margins.”*

– President

DK00057, DK00192



## DataKey Project Overviews: Business Improvement Projects

### Structuring Disparate Ideas into a Solid Business Plan

#### Challenge

A healthcare company with US-based manufacturing lacked formal processes to convert a wide variety of energetic growth and go-to-market ideas into a coherent strategic plan.

#### Actions

- Developed a customized series of strategic planning meetings that provided a forum for management team input and deliberation.
- Guided the management team in structuring and analyzing ideas for new markets, new products and technology extensions.
- Identified and prioritized the “big picture” issues that the company was facing and the large scale business questions that needed to be answered.

#### Results

- **Formalized strategic planning process assisted the company in creating a strategy around key components for success.**
- **Management gained further clarity around the vision for the company and built consensus on the go-forward plan.**
- **DataKey-led follow up workshops incorporated the strategic goals into the daily company operations to facilitate a smooth implementation process.**



#### Business Improvement

##### Industry

Healthcare, *Medical Manufacturing*

##### Company Size

Mid-Market

*“Thank you, DataKey. As an outside resource, you enabled our management team to openly address different opinions on strategy and skillfully weave them into an actionable plan.”*

– Chief Operating Officer

### Defining Leadership Roles & Responsibilities

#### Challenge

Seeking to more clearly define the roles and responsibilities of the senior management team, a construction company was in need of documentation that outlined all reporting and accountability requirements as well as interactions and dependencies between senior executives.

#### Actions

- Researched comparable executive-level positions and job descriptions for CEO, COO, President, CFO, and SVP Client Relations.
- Constructed detailed position descriptions including responsibilities, key management report types, and expected timing for accountability.
- Created an activity chart for each position to clearly illustrate the recommended percentage of time allotted to each major responsibility.

#### Results

- **Clearly articulated role descriptions facilitated a distinct understanding of expectations for the entire management team.**
- **Optimized time management and improved efficiency due to the restructuring of responsibilities among members of the senior management team.**
- **Improved overall productivity and communication between executives.**



#### Business Improvement

##### Industry

Construction, *Commercial*

##### Company Size

Mid-Market

*“Given our stretched capacity, we would never have been able to get all of the roles and responsibilities so well-defined and documented. DataKey’s powerful charts very clearly communicated expectations for our team.”*

– President

DK00064, DK00178

## DataKey Project Overviews: Business Improvement Projects

### Leveraging Social Media to Create Community

#### Challenge

A business services company was determining how best to utilize social media channels to foster a sense of community amongst their customers and open new channels to spread the word about their services.

#### Actions

- Crafted a strategy for the client’s presence and communication via Facebook, Twitter, and LinkedIn.
- Created accounts on each service and coached the client on how to operate the tools and features on each social media channel, including a new corporate Facebook page and a special interest LinkedIn group for a subset of customers.
- Recommended a brand voice strategy and developed a content plan for upcoming releases on Twitter and Facebook.

#### Results

- **Business is up and running on Facebook, Twitter, LinkedIn with 100’s of friends, followers, contacts.**
- **Client is equipped to communicate with customers online and has integrated social media into their regular communication activities.**
- **Customers of the client regularly use the new social media channels to network with each other and discuss topics relevant to their community.**



### Business Improvement Marketing & Communication

#### Industry

Business Services, *Real Estate Solutions*

#### Company Size

Mid-Market

*“DataKey did exactly what I needed: translated the social media channels into relevant tools for my business. We now have a strong, integrated social media presence.”*

– Chief Executive Officer