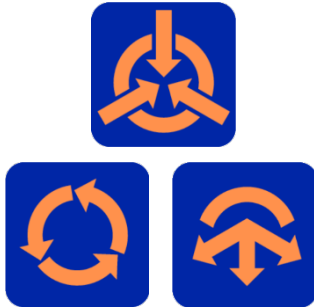


DataKey Project Overviews: Fortune 1000 Companies



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DataKey Project Overviews: Fortune 1000 Companies

Corporate Growth Strategy Development & Board Retreat

Challenge

A Fortune 500 financial services company needed to develop a growth strategy which would enable them to remain competitive in a business environment that required greater economies of scale.

Actions

- Conducted extensive series of interviews with the company Board Members.
- Completed in-depth competitive landscape research across ten macro indices.
- Collaborated with Executive Management completing two-day strategic planning session with the Board of Directors.

Results

- **Forged consensus on corporate strategic direction.**
- **Executive Team developed a detailed implementation plan that connected five-year strategy to immediate goal actions.**
- **Fortified Board's confidence in Executive Team's mastery of business levers and ability to execute against strategy.**



Strategy and Planning

Business Goal Development

Industry

Consumer Products, Financial Services

Company Size

Fortune 1000

"DataKey professionally facilitated our strategic planning process and translated to a clear go-forward plan. We couldn't have done it so quickly, concisely, and professionally without DataKey."

– Chief Executive Officer

Alignment of Worldwide Product Roadmap Processes

Challenge

Worldwide product management teams of this Fortune 100 company produced independent roadmaps at various intervals. Enterprise sales teams had the burden of integrating roadmaps for customer presentations and strategic purposes, which was highly inefficient and sub-optimized company's total product positioning.

Actions

- Consolidated all product roadmap information from teams around the world using a template-format which allowed product and sales VPs to identify disconnects in messaging, timing, and functionality.
- Implemented version control with a periodic release cycle for a complete roadmap that encompassed all products within the scope for the sales teams.
- Produced "Key Update Summary" to highlight new information on each roadmap update.

Results

- **Dramatically improved the quality and consistency of customer-facing roadmap presentations while increasing sales team efficiency.**
- **Enhanced sales team confidence in the accuracy of roadmap information and provided early access to unannounced product plans.**



Strategy and Planning

Product Roadmaps

Industry

Technology, Telecommunications

Company Size

Fortune 1000

"The new roadmap process saves us a lot of 'one-time' work and importantly ensures our messages are now aligned in the field. This has strategic significance for us. Excellent."

– VP Marketing

DK00185, DK00072



DataKey Project Overviews: Fortune 1000 Companies

Structuring an Organization for Private Brand Growth

Challenge

A large industrial distributor with a rapidly growing private brand business wanted to maintain their high growth rate but had not devoted resources to a strategic plan. DataKey was brought on to create a detailed go-forward plan with private brand organizational structure recommendations based on best practice benchmarking.

Actions

- Researched external benchmark data on companies with large, high-growth private brand business and distilled findings into a set of critical success factors and case studies.
- Interviewed key internal stakeholders to determine proper ownership and alignment for initiative success.
- Created a comprehensive project plan from macro level to granular details for executing private brand growth strategy and recommended structures for project management and organization to foster private brand growth.

Results

- **Built consensus across departments behind the private brand initiative.**
- **Equipped client with roadmap for continuing 30%+ CAGR on private brands.**
- **Private brand growth confirmed as a strategic deployment target for upcoming years.**



Strategy and Planning

Organizational Structure

Industry

Industrial Distribution, *Industrial Products*

Company Size

Fortune 1000

“With the roadmap that DataKey provided, we can really hit the ground running. Our process has been greatly accelerated due to DataKey’s work.”

– Chief Operating Officer

Technology Opportunities with a New Innovation Platform

Challenge

A large multinational technology company was seeking a way to capture unique, innovative technology ideas from its employees. An internal online platform to capture, evaluate, and selectively approve the most promising innovation ideas.

Actions

- DataKey benchmarked innovation Best Practices across industries, developed an internal innovation process and the platform specification tailor-made to needs of the organization, and presented it to the CTO team.
- Worked collaboratively to guide the development and testing of the user-friendly internal platform within 60 days.
- Created a comprehensive launch plan and roadmap to successfully rollout the innovation platform.

Results

- **Selected innovative ideas were funded and developed in CTO R&D groups which led to new product features, new market opportunities, or improved efficiency in existing products.**
- **The organization has increased the number of patent and business opportunities due to this formal process of capturing technology ideas.**



Strategy and Planning

Organizational Structure

Industry

Technology, *Hi-Tech*

Company Size

Fortune 1000

“DataKey provided valuable business advice, reporting and analysis that lead to successful program results. The team quickly understood the business challenge and provided a unique, innovative solution. .”

– Vice President,
Strategy and Business
Development

DK00215, DK00258



DataKey Project Overviews: Fortune 1000 Companies



Strategy and Planning

Industry Projection Profiles for Strategic Planning Process

Challenge

\$15 billion Fortune 500 tradeshow management and publishing firm turned to DataKey to assist with comprehensive industry research needed to complete their strategic planning process.

Actions

- Provided in-depth market research and analysis, profiling 15 industries within requested rapid timeframe.
- Designed custom 10-dimension industry profile including growth projections, emerging trends, pending legislation, and macro & micro analysis areas.
- Partnered with Executive Vice President and VP owner of each investigated industry to disseminate significant findings and develop strategic proposals.

Results

- **Corporate strategic go-forward plan built around DataKey research and recommendations.**
- **Standard format and process was created for future industry profiles.**
- **Findings provided catalyst for key actions and solutions to increase sales revenues.**



Business Intelligence

Market Research & Analysis

Industry

Media, *International Tradeshow*

Company Size

Fortune 1000

“The work completed by DataKey is exactly what we wanted. Extremely high quality. We are very pleased. Our Industry Vice Presidents responded with, ‘WOW, this is superb!’”

– Director, Strategic Analysis



DataKey Project Overviews: Fortune 1000 Companies

Customer Insight to Drive Company Strategy

Challenge

Fortune 500 financial services company with 40,000+ customers retained DataKey to enhance position in marketplace. Market intelligence required prior to developing near-term and long-term plans.

Actions

- Designed Customer Intelligence questionnaire, conducted field intelligence gathering consumer sentiment for a new name for an associated spin-off.
- Created and facilitated a series of focus group sessions in Chicago and NYC.
- Delivered an executive summary of the results and comprehensive transcripts of the events.

Results

- **President and Executive Management team on-site to view focus sessions and gained valuable customer insights. Results and recommendations approved by Board of Directors.**
- **Client next asked DataKey to facilitate corporate strategy, marketing strategy and research projects for several years following the initial projects.**



Business Intelligence

Focus Groups

Industry

Consumer Products, *Financial Services*

Company Size

Fortune 1000

“The entire team was a pleasure to work with. We utilized every aspect of the customer research from the focus groups. Very professional team and very effective results.”

– Marketing VP

Benchmarking Private Brand Progress

Challenge

A large industrial distributor with a growing private brand business recognized the importance of understanding best practices for proprietary brand management and tasked DataKey with external benchmarking to assess their progress.

Actions

- Researched best practices and thought leadership around private brand management including brand rationalization, master branding strategies, and brand positioning.
- Documented the current state of the client’s private brand management through extensive internal interviews with executive-level management.
- Provided an assessment of opportunity gaps to bring the client from the current state to a desired future best practice state.

Results

- **Identified the marketing, organizational, and selling priorities needed to achieve private brand best practice.**
- **Achieved consensus among the Executive Management team on private brand best practices and next steps.**
- **Private brand development was designated as one of the client’s major strategic initiatives for the next fiscal year, \$100M+ opportunity identified.**



Business Intelligence

Market Research & Analysis

Industry

Industrial Distribution, *Industrial Products*

Company Size

Fortune 1000

“DataKey continues to provide very insightful and fresh thinking on our challenge. DataKey is clearly unveiling a huge growth opportunity for our business.”

– Chief Operating Officer

DK00051, DK00198



DataKey Project Overviews: Fortune 1000 Companies

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

DK00000, DK00109

DataKey Project Overviews: Fortune 1000 Companies

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



DataKey Project Overviews: Fortune 1000 Companies

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: Fortune 1000 Companies

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.**

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

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

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

DK00209, DK00086



DataKey Project Overviews: Fortune 1000 Companies

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

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

DK00234, DK00157



DataKey Project Overviews: Fortune 1000 Companies

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

Coaching for Complex Enterprise Project Management

Challenge

A team of subject matter experts were not able to move ahead on the deployment of a strategic project, unable to reach consensus on the objectives for a policy and training roll out to a large field organization. Guidance for a young, ambitious project manager was required to get the project moving and back on track.

Actions

- Provided hands-on coaching to clarify the project roadblocks, team dynamics and critical path milestones.
- Transferred project management best practices to the internal project manager. Coached the PM to align the team to the project objectives.
- Supported the PM throughout the six month project to overcome technical and logistic hurdles, resulting in a successful completion, on time and on budget.

Results

- **The policy and training program was rolled out across North America to more than 12,000 employees and managers.**
- **PM and team became aligned on the objective and provided their full support for the project.**
- **The success of the project reduced employee litigation risk to the organization by reinforcing lawful employment policies through training.**



Management Coaching Project Management

Industry

Business Services, Document Management

Company Size

Fortune 1000

“DataKey became a partner and key player on our team to help our aspiring project manager complete this high visibility project. DataKey improved our team effectiveness and decreased the risk of litigation.”

– Senior Vice President HR

DK00249, DK00138