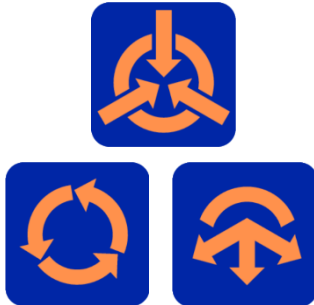


DataKey Project Overviews: Mid-Market Companies



Strategy & Planning

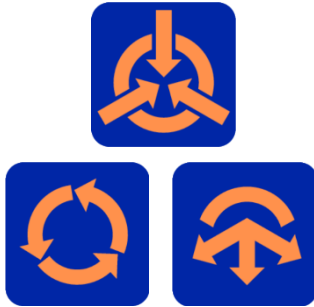
Building Consensus on Go-To-Market Plans	3
Expert Marketing Guidance for High Tech Venture	3
Improved Efficiency of Business Development Efforts	4
Defining Leadership Roles & Responsibilities	4
Improving Ticket Sales with Data Analysis	5
Structuring Disparate Ideas into a Solid Business Plan	5

Business Intelligence

Recurring Survey & Analysis of Economic Environment	6
Brand Recognition Research & Recommendations	6
Focus Groups Shape New Product Strategy	7
Achieving Sales Growth through Benchmarking	7
Understanding Customers through Field Research	8
Evaluation of Strategic Expansion Possibilities	8
Enhancing eCommerce and Web Presence	9
Improving Sales Forecasting of Consumer Products	9
Revealing Insights with In-Depth Customer Research	10

Business Improvement

Leveraging Social Media to Create Community	10
---	----



Mid-Market Companies

Management Coaching

Individualized Training from Experienced Marketer	11
Instant Advisory Board with Roundtable Discussions	11
Mastering the Latest Breakthrough Research	12
Gain Expert Business Insight with Educational Seminars	12
Fostering Accountability for Long-Term Goals	13
Leveraging Strategic Marketing for Product Success	13
Understanding Mindset for Leader Development	14
Practical Advice for Social Media Marketing	14
Business Development & Sales Planning	15
Emergency Session to Foster Collaboration & Understanding	15
Managing Family Business Dynamics to Improve Accountability	16
Motivating Individuals to Maximize Team Effectiveness	16



DataKey Project Overviews: Mid-Market Companies

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.**



Strategy and Planning

Marketing & Sales Strategy

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

Expert Marketing Guidance for High Tech Venture

Challenge

California based high tech company with multiple patent applications turned to DataKey to provide business development and senior marketing guidance as part of their go-to-market and venture capital acquisition strategies.

Actions

- Crafted targeted investor relations “Road Show” messaging and presentation materials.
- Represented the company as VP of Marketing at several industry tradeshows, investor presentations, and media outlets.
- Generated Marketing and Sales sections of investor business plan.

Results

- **Company was able to utilize business plan and a coherent set of marketing materials to build support with multiple investor groups.**
- **Successfully raised \$2M+ additional investment capital to bolster growth and implement strategic plans.**



Strategy and Planning

Business Plans

Industry

Technology, Consumer RFID Tagging

Company Size

Mid-Market

“We couldn’t have come this far without DataKey. They injected a level of professionalism and strategic guidance which helped propel our company to the next level.”

– President & Chief Operating Officer

DK00057, DK00040



DataKey Project Overviews: Mid-Market Companies

Improved Efficiency of Business Development Efforts

Challenge

A \$40M+ construction company was seeking strategic assistance in building their annual business development and marketing plan, particularly in determining how to most efficiently and effectively allocate their selling resources.

Actions

- Conducted a thorough time management study of all selling energies to determine the current state of sales effort allocation.
- Analyzed all proposals from the past three years to track lead sources and link major projects to the originating sales and marketing activity.
- Developed a list of key contacts, referral sources, marketing influencers, and other marketing efforts to focus the client’s business development activities.

Results

- **Identified the critical “VIP” sales sources for the organization and determined the dollar value of time spent with the VIP contacts.**
- **Reprioritized executive-level sales planning based on the determined ROI of each sales activity.**
- **Invested in the development of an on-going rolling marketing calendar to allocate sales time and energy against categories with the highest ROI.**



Strategy and Planning

Business Goal Development

Industry

Construction, Commercial

Company Size

Mid-Market

“Through this in-depth time management study, DataKey was able to quantify and demonstrate the true value of all of our different marketing activities. The findings were so dramatic that we have now reprioritized all of our future marketing activities.”

– President

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.**



Strategy and Planning

Organizational Structure

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

DK00187, DK00178

DataKey Project Overviews: Mid-Market Companies

Improving Ticket Sales with Data Analysis

Challenge

A NY-based theater company was having difficulty maximizing their seat fill rate and desired to increase sales, optimize marketing efforts, and create an effective ticket pricing strategy.

Actions

- Performed extensive analysis of 7 years sales data, examining 125,000+ data records to uncover breakthrough correlations.
- Strategic recommendations to advance the company's ticket sale performance presented to President.

Results

- **Board of Directors approved and implemented all recommendations and tactics.**
- **Sales and profitability increased by more than 300% over the previous season.**



Strategy and Planning

Business Development

Industry

Arts, Theater

Company Size

Mid-Market

"We were thoroughly impressed by the practical DataKey recommendations which fit our budget, but even more impressed with their breakthrough, eye-opening findings."

– Executive Director

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.**



Strategy and Planning

3-5 Year Strategy

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

DK00090, DK00064

DataKey Project Overviews: Mid-Market Companies

Recurring Survey & Analysis of Economic Environment

Challenge

Westchester County NY has a vibrant business economy, comprised of 30,000+ businesses, with a complex mix of industries, from solopreneurs to Fortune 500. DataKey was brought in to design, conduct and analyze the business health of the region.

Actions

- DataKey analyzed the business make-up of the region and determined statistical sampling algorithms.
- Designed research and analysis based on a series of critical business health components focusing on leading predictive Key Performance Indicators (KPI's).
- Designed weighting criteria by factoring company size, respondent position, and other variables. Conducted the research, completed analysis, and summarized results.

Results

- **Created region's first economic Business Confidence Index.**
- **Consistent process now conducted by DataKey every quarter for the region, now in 3rd calendar year.**
- **Results published regularly in business print and on-line publications.**



Business Intelligence

Market Research & Analysis

Industry

Economic Development, *Regional*

Company Size

Mid-Market to Fortune 1000

"This is exactly the type of high quality breakthrough data analysis we have come to rely on from DataKey. Keep it up the region needs DataKey!"

— Westchester County Regional Economic Development Director

Brand Recognition Research & Recommendations

Challenge

Television News Station in highly competitive multi-million viewer U.S. audience base was experiencing brand awareness issues and had an objective to advance station to higher ratings. DataKey was recruited to gather base customer intelligence.

Actions

- Designed a customized field study approach, ensuring statistical neutrality and a significant database of input.
- Conducted field research, managing and supervising over 5,000 calls to target demographic market segments.
- Performed extensive analysis of study findings to discover key opportunity areas.

Results

- **Identified breakthrough opportunities for station viewership growth and generated industry best-practice approaches.**
- **Strategic recommendations implemented by senior station management to improve brand recognition.**



Business Intelligence

Voice of the Market

Industry

Media, *Television News*

Company Size

Mid-Market

"DataKey delivered! Their attention to detail and response time for completing the project exceeded our expectations in every aspect of this large undertaking."

— Senior Research Partner



DataKey Project Overviews: Mid-Market Companies

Focus Groups Shape New Product Strategy

Challenge

A physician network frustrated with the ever-escalating cost of healthcare engaged DataKey to provide strategic recommendations regarding product design.

Actions

- Designed and conducted a series of focus group sessions to further shape the company's revolutionary medical service offering.
- Compiled feedback from target segments to determine effective strategies for new product development.

Results

- **Delivered key recommendations to advance the group's product, including a comprehensive 50-page market intelligence document.**
- **Product is currently under development with market research feedback fully incorporated.**



Business Intelligence

Focus Groups

Industry

Healthcare, *Physicians Network*

Company Size

Mid-Market

"DataKey produced results. They masterfully facilitated the entire focus group process which was instrumental in the design of this breakthrough approach to Healthcare."

– Director Medical Staff

Achieving Sales Growth through Benchmarking

Challenge

Highly successful pneumatics controls distributor was looking to take the company to the next level and retained DataKey to determine strategies for achieving sustainable sales growth.

Actions

- Provided strategic planning and customer intelligence by conducting external field research as well as internal analysis on thousands of data records.
- Presented a targeted list of 10 strategic recommendations to President & VP of Sales.
- Determined benchmark business goals for sales force based on findings of research study.

Results

- **Launched immediate implementation based on strategic recommendations and retained DataKey to manage several implementation phases.**
- **Sales increased by over 25%, directly attributable to strategic analyses and planning.**



Business Intelligence

Market Research & Analysis

Industry

Technology, *Electronics-Pneumatics Distribution*

Company Size

Mid-Market

"We were extremely pleased with the entire approach and recommendations that DataKey delivered. So much so, that we are utilizing them to assist with the implementation in several strategic areas."

– President & Chief Executive Officer

DK00037, DK00043

DataKey Project Overviews: Mid-Market Companies

Understanding Customers through Field Research

Challenge

Westchester-based media industry leader with circulation in excess of 350,000 turned to DataKey to forge new strategic direction, increase sales, and create ability to identify a customer at risk profile.

Actions

- Designed customized field research study and gathered extensive customer intelligence.
- Synthesized findings and facilitated multiple integration sessions with Executive Management team.
- Presented 10 key strategic recommendations to CEO, with follow up to entire management team and sales force.

Results

- **Recommendations were integrated into the company's "go-forward" strategy with ongoing implementation.**
- **Several key at-risk accounts were identified and action was taken to retain those customers.**



Business Intelligence

Market Research & Analysis

Industry

Media, Publishing

Company Size

Mid-Market

"The research was delivered on-time, on-budget, and on the money. After a thorough examination, DataKey made recommendations that were quick to implement and had immediate significant customer impact."

– Senior Manager, Sales & Marketing

Evaluation of Strategic Expansion Possibilities

Challenge

A regional economic development company had an opportunity to expand their service area for small business micro-loans. To ensure the success of the possible expansion, a better understanding was needed of local market demands, competitive factors, business systems and target marketing.

Actions

- Leveraged DataKey and client contacts to conduct extensive primary interviews with VIPs familiar with the small business environment and business networks in the expansion area.
- Accumulated data-centric secondary market research to assess potential gaps in small business lending and the socio-economic conditions in the area.
- Thoroughly processed and analyzed the information collected to develop realistic, concrete recommendations for expansion.

Results

- **Designed an expansion strategy for near-term and long-term, including immediate resources and contacts for the company.**
- **Recommended clarified market positioning and a network of strategic partnerships that would rapidly accelerate the expansion plans.**



Business Intelligence

Market Research & Analysis

Industry

Economic Development, Not for Profit
Financial Services

Company Size

Mid-Market

"DataKey delivered more than we expected. Not only did they give us clear, concise and accurate directions for the future, they promoted our business and clarified our messaging along the way."

– Executive Director of Small Business Lending

DK00035, DK00192



DataKey Project Overviews: Mid-Market Companies

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 21st 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 Intelligence

Market Research & Analysis

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

Improving Sales Forecasting of Consumer Products

Challenge

A major CPG company was relying heavily on its Field Sales team qualitative information to forecast unit sales. This method resulted in significant inefficiencies and error rates, ranging between 50 to 100 % on the SKU/product level, wreaking havoc on supply chain business processes and inventory management.

Actions

- Worked with SVP Sales, SVP Marketing, SVP Operations to address shortcomings of current forecasting methodology.
- Compiled a database to collect historical sales data and retail market drivers (e.g., price, distribution, promotion) over the last several years.
- Created comprehensive data-driven multivariate regression models to more accurately predict sales.
- Conducted comprehensive research on variables that drove sales.

Results

- **Compiling extensive market-drivers saved the company \$200,000 it had planned to commit to a marketing-mix research study.**
- **Implemented marketing-mix analytics to determine sales drivers.**
- **Demonstrated to Executive Management that in-store trade promotions proved a more effective way to spend marketing dollars.**



Business Intelligence

Market Research & Analysis

Industry

Consumer Products, Paper Goods

Company Size

Mid-Market

"Can we hire the analyst from DataKey as a full-time employee? This work is extraordinary!"

– Chief Executive Officer

DK00198, DK00167



DataKey Project Overviews: Mid-Market Companies

Revealing Insights with In-Depth Customer Research

Challenge

Faced with an aging audience base, a NY theater company was anticipating a decline in future ticket sales and was undecided on how to grow their customer base over the next several seasons. The Board had generated ideas for marketing to a broader and younger audience, but was lacking an effective strategy.

Actions

- Designed an in-depth research study to uncover the perceptions, preferences, satisfaction, and demographics of a 7,000 person database.
- Analyzed survey results including nearly 5,000 open-ended responses and developed patron segmentation methodology to illuminate further insights into emerging trends and patterns.

Results

- **Extremely high response rate of over 15%.**
- **Discovered clear patterns in income, spending habits, and show/schedule preferences amongst segments of newer and younger patrons, enabling the Board to select the marketing strategies most likely to attract this segment.**
- **Revealed new insights into elements of the experience most valued by patrons and the theater's overall economic impact, giving the Board a powerful position when negotiating with partners and vendors.**



Business Intelligence

Market Research & Analysis

Industry

Arts, Theater

Company Size

Mid-Market

"We could never have understood our patrons to the degree we now do without DataKey's mastery of research design and relentless analysis of the data. These findings have had a direct impact on our marketing strategy."

– Managing Director

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

DK00184, DK00206

DataKey Project Overviews: Management Coaching Projects

Individualized Training from Experienced Marketer

Challenge

The Vice President of Sales & Marketing at a mid-sized industrial supply company recognized that in order to bring the company to the next level, more focus was needed on company strategic marketing. DataKey was brought aboard to coach the VP on applied strategic marketing principles.

Actions

- Designed a series of 10 two-hour modules focused on strategic marketing principles relevant to the company.
- Worked closely with VP in individualized 1-on-1 sessions to teach critical marketing dimensions and apply the knowledge to the company's specific business challenges.

Results

- **VP directly converted knowledge from coaching sessions into tangible changes in operations to improve the effectiveness of sales and marketing efforts.**
- **Company was able to invest in highly targeted employee education without losing productive time to a lengthy MBA course or off-site training.**



Management Coaching

Individual Coaching

Industry

Industrial Supply, Janitorial Supplies & Equipment

Company Size

Mid-Market

"Our Vice President is learning an incredible amount from DataKey very rapidly and has been able to immediately apply his strategic marketing learning to our everyday operations."

– Chief Executive Officer

Instant Advisory Board with Roundtable Discussions

Challenge

Without a dedicated Board of Directors, many mid-market CEOs find themselves with nowhere to turn for advice on pressing critical business issues. Key Advisors facilitates roundtable discussions enabling CEOs to share experiences and gain advice from a group of non-competitive peers.

Actions

- Each Key Advisor participant is allocated time to share a current business challenge with the entire group of peer CEOs and DataKey expert consultants in a roundtable discussion format.
- Participants share relevant experience and lessons learned, as the CEO group acts as a sounding board sharing potential solutions.

Results

- **CEOs are able to share the burden of internal challenges with others who have faced similar issues and offer valuable advice.**
- **Participants who have done the hard work of researching and implementing solutions are able to provide practical guidance to others who are tackling similar tough business issues.**



Management Coaching

Key Advisors

Industry

Various

Company Size

Mid-Market

"Key Advisors CEO advisory board is run professionally, insightful, and most importantly consistently helps us resolve thorny business issues. They help us work on - and work in - our business."

– Key Advisors Member

DK00224, DK00216



DataKey Project Overviews: Management Coaching Projects

Mastering the Latest Breakthrough Research

Challenge

With the everyday demands of running a successful business, mid-market CEOs lack the time to delve into the myriad new business advice books available each year. DataKey sifts through the onslaught to extract the publications with the most value for Key Advisors participants.

Actions

- DataKey analyzes the key messages of new business books to determine which offer the most value for the time invested.
- Hardcover and audiobook formats of a recommended book are provided for each participant at every Key Advisors meeting.
- Most importantly, DataKey facilitates discussion and drives relevancy.

Results

- **The latest business breakthroughs are made available to CEOs in a convenient format without time wasted researching authors or reading book reviews.**
- **Maximum value for time spent is assured for every recommended book.**
- **CEOs stay up-to-speed on the latest business thinking.**



Management Coaching

Key Advisors

Industry

Various

Company Size

Mid-Market

“Not only does DataKey prioritize the best business books for our company, but they also extract the essential takeaways to facilitate immediate high-impact application.”

– CEO, mid-market Key Advisors member

Gain Expert Business Insight with Educational Seminars

Challenge

CEOs of mid-market companies have a desire to gain in-depth knowledge on business strategy but lack the time flexibility to enroll in lengthy traditional formal education. Key Advisors recruits credentialed business experts to share key insights in an efficient seminar format.

Actions

- Challenges and needs of the Key Advisors participants are evaluated to determine optimally beneficial speaker topics.
- Expert speakers deliver comprehensive and interactive seminars with lively discussion in a two-hour format.
- Past discussion topics include: people management, corporate culture, sales prospecting, mergers and acquisitions, strategic planning, and new productive development, among others.

Results

- **CEOs acquire a top-tier, relevant business education without the hassle or expense of graduate school or multi-day retreats.**
- **Opportunity provided to network and build longer-term relationships with authorities on relevant business topics.**



Management Coaching

Key Advisors

Industry

Various

Company Size

Mid-Market

“The guest speaker DataKey brought to Key Advisors last month was the best I have seen in ten years. Engaging, informative, challenging – DataKey has the formula that keeps this fresh.”

– CEO, 500+ employee mid-market company

DK00216, DK00216



DataKey Project Overviews: Management Coaching Projects

Fostering Accountability for Long-Term Goals

Challenge

Mid-market CEOs without a dedicated Board of Directors struggle with maintaining accountability for long-term company goals. DataKey introduced the quarterly Key Focus initiative to the Key Advisors program to assist CEOs with setting and achieving longer term goals.

Actions

- Provided a goal setting framework to help CEOs commit to 90-day goals and articulate the necessary action steps, owners, risks and countermeasures, and tangible outcomes for each goal.
- CEOs share progress against goals and provide a self-assessment.
- Analyze factors behind successes and failures as a group to disseminate knowledge and lessons learned.

Results

- **Group discussion format fosters a sense of accountability and provides a catalyst for change.**
- **Breakthrough patterns discovered across failures and successes which could be built upon for future problem solving.**
- **Direct focus brought to critical aspects of participants' businesses with a supportive group of peers to share advice and provide encouragement.**



Management Coaching

Key Advisors

Industry

Various

Company Size

Mid-Market

“While demanding, I appreciate the peer accountability! DataKey helped accelerate achievement of our mission critical goal initiatives; they get it done and then some.”

– CEO, midsized company

Leveraging Strategic Marketing for Product Success

Challenge

Strategic marketing is an essential tool for understanding the voice of the market and developing products to provide maximum value to customers. DataKey equips small business leaders with expert guidance and powerful tools to channel the voice of the market into successful product and service offerings.

Actions

- Led participants through a workshop to gain insight on how their company captures the voice of the market and leverages that data in the product development process.
- Introduced compelling, practical tools to self-assess and improve the new product development process, including Quadrant Analysis, Stage Gate Model, and Net Promoter Score.

Results

- **Participants assessed their company's strategic marketing and product development processes to determine a course of action to better capture the voice of the market.**
- **Leaders were equipped with tools to drive change in their organizations using the strategic marketing methods**



Management Coaching

Key Leaders

Industry

Various

Company Size

Mid-Market

“Real work situations are brought to the table. We have the opportunity to discuss alternatives and hear a wide variety of experiences from seasoned senior managers. It's wonderful hearing solutions from multiple perspectives.”

– Key Leaders Participant

DK00216, DK00165



DataKey Project Overviews: Management Coaching Projects

Understanding Mindset for Leader Development

Challenge

Effective leaders understand that the mindset of an individual or organization drives their actions and the subsequent results. DataKey's leadership coaching improves the effectiveness of small business leaders by facilitating a deeper understanding of mindset and concerns across the entire organization.

Actions

- Illustrated practical scenarios of how mindset, including attitudes and biases, compels action and affects results.
- Utilized the "Pie of Concerns" tool to help leaders understand how their responsibilities are cascaded through multiple levels of their organization.

Results

- **Participants completed a thorough analysis of how their own mindset and concerns emanate throughout their organizations.**
- **Participants established a plan for more effective leadership with a deeper understanding of the impact of mindset.**



Management Coaching

Key Leaders

Industry

Various

Company Size

Mid-Market

"Key Leaders is exactly what I am looking for to help take my senior management team to the next level and help advance our company! I am adding an additional management team member."

– CEO, midsized company

Practical Advice for Social Media Marketing

Challenge

Entering the dynamic world of social media marketing can be a daunting challenge for small businesses. DataKey's Social Media Marketing Key Exchange seminar summarized the key advantages of the latest social media tools and shared detailed technologies assisting participants in integrating social media into their existing marketing and communication plans.

Actions

- Illustrated how social media is a smart marketing instrument to fulfill aspects of a complete marketing and communication plan supporting overall business goals.
- Clearly explained the latest social media tools and provided a framework for understanding how each tool can be used most effectively to enhance a business persona.

Results

- **Participant drafted a social media plan for their business and received immediate feedback from on-site social media experts.**
- **Companies benchmarked their "as-is" social media effectiveness against standards and took away practical tips for accelerating social media activities in their businesses.**



Management Coaching

Key Exchange

Industry

Various

Company Size

Mid-Market

"DataKey demystified social media and set our company on a clear path to leverage the aspects that make sense for us."

– Chief Executive Officer,
Construction Management Firm

DK00165, DK00213



DataKey Project Overviews: Management Coaching Projects

Business Development & Sales Planning

Challenge

Growing businesses lack exposure to the wealth of business development and sales development tools that are available to help a business maximize revenue and grow. DataKey's Business Development & Sales Planning Key Exchange seminars provide a crash course on best practices in business development and equips participants with real-world tools for immediate application.

Actions

- Presented in-depth best practices about the structure of a sales and revenue plan, including pipeline management, quotas, farming, hunting, sales history, market share, growth trends, and segmentation.
- Conducted hands-on seminar on Customer Relationship Management (CRM) components such as customer value, resource optimization, customer retention and acquisition, and the latest CRM software.

Results

- **Participants identified top business development and sales obstacles, then devised countermeasures and action plans for their companies.**
- **Practical best practice tips were applied immediately to participants' businesses to improve sales results.**



Management Coaching

Key Exchange

Industry

Various

Company Size

Mid-Market

"We are a midsized growing business with a 20 person sales force and we know how to sell. What DataKey showed us was how to strategically manage the sales process itself. Invaluable!"

– VP of Business Development,
\$50M Distribution Company

Emergency Session to Foster Collaboration & Understanding

Challenge

DataKey helped the client avoid a management team crisis, helping the leaders of a mid-market distribution company immediately improve communications and foster increased collaboration to make the team more effective. Assumptions and thought processes behind behavior were examined to reveal insights into the team's collective working style.

Actions

- Conducted a series of rapid one-on-one interviews to allow key management to vent frustrations
- Provided tools helping to diffuse the immediate tension upsetting individual managers
- Instructed team members on more effective techniques for making judgments and perceiving actions based on the unique composition of this team's personalities.

Results

- **Team members began to understand and respect other members' pressures and points of view**
- **Managers utilized professional tools to see the larger common goal and the importance of collaboration.**



Management Coaching

Team Coaching

Industry

Industrial Supply, Janitorial Supplies & Equipment

Company Size

Mid-Market

"Thank you, DataKey. You helped us extremely with useful tools that shifted our internal frustration to a collaborative effort aimed at our competitors."

– Senior Manager

DK00213, DK00196



DataKey Project Overviews: Management Coaching Projects

Managing Family Business Dynamics to Improve Accountability

Challenge

The founder of a family-owned and operated scientific electronics company retired without naming a successor. Lacking direction, no single individual from the management team – which included both family and non-family employees – was stepping up to take responsibility for major strategy decisions. DataKey was brought on to address how the people factors were impacting the company’s ability to create a cohesive strategy.

Actions

- Investigated how the remaining managers worked together and how each manager’s operating style impacted their potential for leadership.
- Evaluated how the family business dynamics within the company contributed towards making the management team feel uncomfortable issuing decisions.

Results

- **Heightened awareness of team dynamics by exploring examples of failed decision-making and identifying causes.**
- **Improved accountability by creating a tool which assisted the management team with delegating responsibilities amongst committees and electing leaders for specific projects.**



Management Coaching

Team Coaching

Industry

Technology, *Scientific Electronics*

Company Size

Mid-Market

“This was and continues to be extremely difficult for us... We wouldn’t possibly be having this discussion if it were not for the powerful private consulting discussions with DataKey.”

– Senior Management Team

Motivating Individuals to Maximize Team Effectiveness

Challenge

A multimillion-dollar software company noticed variable motivation levels amongst team members which was blocking team productivity and impacting morale. The company wanted to unify the team and improve individual motivation.

Actions

- Working with the senior management team, DataKey examined specific team situations identifying levers that would increase the internal motivation of various key individuals on the team.
- Evaluated team members to understand career aspirations, interest in work activities, and personality factors that could contribute to motivation.
- Compiled diagnostics, created detailed management improvement plan.

Results

- **Client implemented changes to identified motivation levers and noticed marked improvement in overall team motivation.**
- **Management mindset evolved from “problem individuals” to “individuals behaving rationally according to their perceptions” which improved conflict resolution and created a more unified “in it together” culture.**



Management Coaching

Team Coaching

Industry

Technology, *Software*

Company Size

Mid-Market

“I had been stymied by Group A motivated employees who ‘got it’ and Group B employees who were ‘9 to 5.’ I now realize that I have created this culture and I can repair it.”

– Chief Executive Officer

DK00165, DK00180