

DataKey Project Overviews: Strategy & Planning



Fortune 1000 Companies

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Corporate Growth Strategy Development & Board Retreat #26

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

Strategic Partner Evaluation for Hardware Integration #23

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.**



Strategy and Planning

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

DK00185, DK00211

DataKey Project Overviews: Strategy & Planning Projects

Revamping National Consumer Product Brand #3

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.**



Strategy and Planning

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

Alignment of Worldwide Product Roadmap Processes #6

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

DK00201, DK00072

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Optimized Pricing Strategy to Build Revenue #7

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.**



Strategy and Planning

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

Redesign Employee Performance Evaluation Process #18

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.**



Strategy and Planning

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

DK00109, DK00146



DataKey Project Overviews: Strategy & Planning Projects

Structuring an Organization for Private Brand Growth #28

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 brand business.**
- **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

Acquisition Integration - HR Project Management #55

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 on-boarding, 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.**



Strategy and Planning

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

DK00215, DK00249

DataKey Project Overviews: Strategy & Planning Projects

Technology Opportunities with a New Innovation Platform #64

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



Strategy and Planning



DataKey Project Overviews: Strategy & Planning Projects

Improving Ticket Sales with Data Analysis #13

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

Evaluation of Strategic Expansion Possibilities #17

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.**



Strategy and Planning

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

DK00090, DK00208



DataKey Project Overviews: Strategy & Planning Projects

Improved Efficiency of Business Development Efforts #20

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 #21

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: Strategy & Planning Projects

Structuring Disparate Ideas into a Solid Business Plan #25

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

Building Consensus on Go-To-Market Plans #01

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

DK00064,DK0057

DataKey Project Overviews: Strategy & Planning Projects

Expert Marketing Guidance for High Tech Venture #10

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