

DataKey Project Overviews: Fortune 1000 Companies



Strategy & Planning

Corporate Growth Strategy Development & Board Retreat	2
Alignment of Worldwide Product Roadmap Processes	2
Structuring an Organization for Private Brand Growth	3

Business Intelligence

Industry Projection Profiles for Strategic Planning Process	3
Customer Insight to Drive Company Strategy	4
Benchmarking Private Brand Progress	4

Business Improvement

Revamping National Consumer Product Brand	5
Optimized Pricing Strategy to Build Revenue	5
Strategic Partner Evaluation for Hardware Integration	6
Redesign Employee Performance Evaluation Process	6
Creation of Process to Manage Complex HR Projects	7
Guiding Rapid Integration of Acquired Businesses	7
Effective Marketing for New Technical Product	8

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

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

DK00051, DK00033



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, DK00033



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

DK00211, DK00146



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.**



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