

# DataKey Project Overviews: Management Coaching



<b>Individualized Training from Experienced Marketer</b>	<b>2</b>
<b>Instant Advisory Board with Roundtable Discussions</b>	<b>2</b>
<b>Mastering the Latest Breakthrough Research</b>	<b>3</b>
<b>Gain Expert Business Insight with Educational Seminars</b>	<b>3</b>
<b>Fostering Accountability for Long-Term Goals</b>	<b>4</b>
<b>Leveraging Strategic Marketing for Product Success</b>	<b>4</b>
<b>Understanding Mindset for Leader Development</b>	<b>5</b>
<b>Practical Advice for Social Media Marketing</b>	<b>5</b>
<b>Business Development &amp; Sales Planning</b>	<b>6</b>
<b>Emergency Session to Foster Collaboration &amp; Understanding</b>	<b>6</b>
<b>Managing Family Business Dynamics to Improve Accountability</b>	<b>7</b>
<b>Motivating Individuals to Maximize Team Effectiveness</b>	<b>7</b>

## 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 mid-sized 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