

## **Project Summaries**

### **Client Summary 1**

For this East Coast emerging stage security company, we worked with the CEO and management team to define an OEM/partnering strategy then to help them execute on the agreed plan. Several partnerships were established, resulting ultimately in the acquisition by a multi-billion dollar technology company. Our relationship with this client was nearly two years in duration.

### **Client Summary 2**

For this European emerging stage networking company, we led an initiative to define the size of the North American opportunity for them, and how best to attack it. Our work resulted in the market being approximately half of what the Board and management team originally thought, and led the company to redefine how it would best launch in the US.

### **Client Summary 3**

For this European emerging stage security company, we worked in partnership with a boutique investment bank to help facilitate a sell-side transaction. Our role included due diligence of the company, identification of likely purchasers and rationale why, and review of competitive landscape. This client was acquired by a US buyer, and Milestone Group was integral in the process.

### **Client Summary 4**

For this Silicon Valley emerging stage SaaS infrastructure company, we worked alongside the CEO and management to prepare for a launch at DEMO, which was ultimately very successful. Subsequently, we also helped this company prepare for DreamForce. This client was ultimately acquired.

### **Client Summary 5**

For this Silicon Valley emerging stage infrastructure company that plays in the open source space, we defined the original business development and partnering strategy, resulting in a flood of partnering opportunities that literally overwhelmed the product marketing and engineering teams. The CEO reluctantly asked us to take a quarter off while engineering caught up with the pipeline of opportunities we built!

### **Client Summary 6**

For this European emerging stage storage and networking company, we worked with the Board and management team to prioritize US OEM and system integrator opportunities, then successfully executed on a series of partnerships, including a very active global partnership with IBM. For six months, a team from Milestone Group served as the interim US management team for this client.

### **Client Summary 7**

For this Silicon Valley Web 2.0 podcasting service, we helped conceive the initial service idea

and refined the value proposition, developed the product specification for the web portal, designed and coded the user interface, developed the technology architecture using the DotNetNuke Framework, and managed an Indian outsourcing development partner through to final QC. We also developed the marketing and demand generation strategies, researching the target user demographic. Based on that input, we developed the brand language for the site, and also developed the subscriber and publisher features and categories that target users they were most interested in.

**Client Summary 8**

For this Australian Web 2.0 company we developed a US market entry strategy and execution plan. Additionally we appointed an interim VP Business Development to drive partnering relationships with leading consumer brands (Amazon, Nissan, Converse and others) as well as with national/regional advertising agencies that have strong consumer brand accounts.

**Client Summary 9**

For this emerging stage applications company, we worked with the Board and management team on market strategy, all re-branding and messaging, and OEM/partnering strategies. On an interim basis, we additionally led all partnering activities with key vendors including SAP, Oracle, IBM and Microsoft.

**Client Summary 10**

For this global telecommunications company, we were retained to help manage, redesign and launch a new collaboration product line. This assignment quickly expanded to another revolutionary project focused on bringing another new technology to the web. We helped craft the overall business strategy, which resulted in the creation of a new internet subsidiary. We subsequently created the marketing strategy for this internet subsidiary, as well as establishing the initial sales contacts. During the 18-month duration of the project, we led one of two web-based product teams, managed the redesign and product launch of a new internet technology, and coordinated internal/external product and engineering teams.

**Client Summary 11**

For this high growth Silicon Valley infrastructure company, we were brought in to help them decide which new market sectors to go after, how to reach them effectively, and with what value propositions. After the precision segmentation and buyer profile descriptions had been completed, we were retained a second time to conceive, design and implement a direct mail campaign as part of their lead generation activities.

**Client Summary 12**

For this \$100M infrastructure company, we were brought in to develop and drive a buy-side M&A strategy. Starting with a list of over 600 potential tuck in acquisitions globally, we created the prioritized acquisition criteria then filtered the acquisition list to 20 targets globally. We then contacted all 20 potential targets to gain further information and insights. The company made two acquisitions based on our recommendations.

**Client Summary 13**

For this \$900M integrated service provider, we were asked to develop the brand and brand assets. We crafted corporate position messaging, value proposition and all online and print collateral.

**Client Summary 14**

We've now completed two assignments for this \$500M software company. The initial project was a very detailed Precision Segmentation analysis that pointed out additional sales opportunities and laid out how the company should position itself competitively against both larger and smaller players, and developed a set of associated value propositions. These findings were based on detailed competitive and statistical analyses derived from live interviews with almost 140 actual and potential customers. The second project we collaborated with the company's internal research team, and compiled a correspondingly in depth analysis of their sales organization, analyzing the root causes of past sales successes as well as shortfalls. This analysis resulted in recommendations on how to organize the sales force for greater effectiveness and efficiency.

**Client Summary 15**

For this multi-billion dollar software company, we completed multiple strategic assignments that ranged from detailed competitive analysis, defining areas of competitive superiority, developing ROI models for the company as well as associated sales training materials. We also analyzed sales forecasting models, and completed several other strategic projects for their sales and marketing teams.

**Client Summary 16**

For this multi-billion dollar technology company, we were asked to independently review the planned launch of a new application. Our analysis indicated the market size for the application was 200% less than originally forecast, and that potential buyers were, on average, willing to pay only 50% of what the company believed they could sell the software for. Based on our findings and recommendations, and the nature of the market space they were planning to enter, the client abandoned the new product launch.

**Client Summary 17**

For this multi-billion dollar technology company, we did a thorough Competitive Landscape Review of 20+ competitors for a particular product line, then developed a competitive TCO tool where this company's sales team could review real time TCO of their products against similarly configured competitors products.