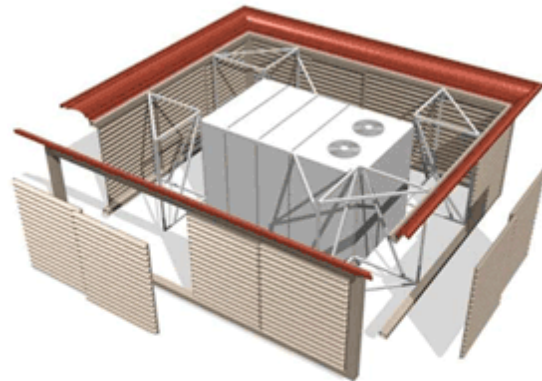


Case Histories: CityScapes and Quantum Services

We are providing two Case Histories in this PDF document. Other examples are available in the Case Histories section of the kellyallan.com website.

CityScapes

Situation: CityScapes manufactures envisor® rooftop equipment screens. These screens are a patented, revolutionary product both in design and functionality. The screens hide rooftop HVAC equipment units and satisfy municipal building codes.



**Rooftop Screening Solutions That Are
3 Generations Ahead
of the Next Best Solution.**

CityScapes had enjoyed robust sales of this innovative product for several years. Then, inexplicably, sales momentum slowed. CityScapes wanted an outside perspective on their marketing and sales approach and asked us for an analysis.

1. Discover the root cause of the sales slump

CityScapes has strong knowledge of its main client base, commercial architects. Sellers are well-trained and the product had enjoyed success. Indeed, one of the main product features (that envisor does not poke holes in the roof of the building, but attaches directly to the HVAC unit) was very appealing to architects and builders alike. Yet, sales had slowed. We analyzed the overall sales and marketing approach, reviewed sales materials, etc. We also

envisor.
Rooftop Equipment Screens

features and benefits

On a scale of 1 to 5, please rate the following features on their importance or significance to you.
(1 = high significance/importance, 5 = little importance or significance)

| | |
|--|---|
| | Envisor screens involve no rooftop penetration |
| | Envisor offers custom design capabilities such as custom styles and colors |
| | Envisor can help you stay in budget |
| | Envisor is a viable solution to municipal screening code requirements and headaches |
| | Envisor is an affordable screening solution |
| | In addition to screening individual units, envisor can also screen multiple units with a continuous screen |
| | Envisor is an alternative to parapets |
| | Envisor screens are patented |
| | Envisor has been screening rooftop equipment since 1996 |
| | Envisor allows you to design-in control and integrity of your project |

conducted research with architects and made many interesting discoveries about the perception of the product and the limits of the “no rooftop penetration” message of the sales pitch. We also uncovered other areas of potential appeal.

2. Save time by testing and selling – at the same time

Using the research information, we created ideas for new sales messages and new routes to reach decision-making architects. Our approach to marketing and sales, in this case, was to test our new messages and new routes simultaneously --and “live”. Our theory was that further market research/testing of the messages and routes would be time-consuming, costly, and unnecessary. So, for example, we tested the product messages by going live with them in sales calls, telephone calls, and direct mail with prospective clients.

3. Roll out what you’ve learned--as you learn it

As we and the sellers learned (in real sales calls) more about which messages were of most interest, we continued to analyze results and then had the sellers adjust the messages “on the fly” as we continued to refine them. We trained the sellers on how to increase their effectiveness, and followed-up with them on their efforts.

4. Improve “back office” and develop marketing dashboard



With a wider array of messages, delivery routes, and focused effort, sales began to improve significantly. Next, we worked with the CityScapes VP of Sales and Marketing to make the marketing system more robust. This included a complete overhaul of the database and database sources, and a re-organization of duties within the department to support sales effort, direct mail, etc.

We also worked with the company to develop a “dashboard” of marketing and sales results and activities. The dashboard provides data for use in decision-making about markets, budgets, profits, momentum, proposal writing, pricing, etc.

5. New Markets and Greater Profit

CityScapes had considered hiring sellers so the company could achieve a greater presence in certain geographic markets. Much of the nationwide coverage had been managed by sellers traveling to those markets as they had time to do so. However, our research showed there were several “hot markets” which could justify a greater presence of a seller. To confirm our analysis

we did a "market viability" test. The test was positive for two of the target markets. We worked with CityScapes to quickly interview and hire a new sales rep for those markets. There was no need to wait because our viability test effort had yielded new, qualified leads for the new sales person to begin follow-up from day one.

6. Outcomes

Within a few months of our involvement with CityScapes, sales increased and costs decreased. That was in June 2003. CityScapes continues to be a client, as does its sister company, National Sign Systems. We meet regularly with the VP Marketing, VP of Operations, and the President. The business has tripled since 2003.

--You helped us build more robust marketing and sales capabilities and helped us make and save more than enough money to pay for your company's services, many times over. We expect our business to double. Your contributions to that success are much appreciated.

James E. Cullinan , President & CEO

July 7, 2004

--Your insight and guidance have helped enable us to improve in many areas vital to our success. We are continually impressed with the depth and breadth of your knowledge and resources. Your organization is filled with team players who are enjoyable to work with. You and your associates have the utmost respect of the people in our organization.

Paul Falkenbach, VP Sales & Marketing

September 30, 2005

--You and your organization have added real value and measurable value to our profits and performance for several years. You've helped us with both important incremental improvements and with big leaps forward, as well.

David Cullinan, Vice President

June 13, 2007



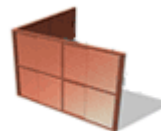
VERTICAL



CANTED



VERTICAL W/ TOP TRIM



STACKED



CUSTOM

Quantum Services:

Situation: Quantum Services provides inventory and cash audits to convenience stores. In 1994 Quantum was searching for a marketing firm to help the company grow. Several firms were interviewed. The owner was an inexperienced buyer of marketing services. So, he took the proposals from marketing firms to his TEC/Vistage group. The decision was unanimous to hire KAAL (Kelly Allan Associates, Ltd.)



1. Discover how to grow the business faster

Quantum is a proactive company. The company was enjoying growth, but wanted to dominate the industry. KAAL conducted a marketing and sales review, and then made several recommendations --and helped to implement them. The recommendations/implementations have included everything from sales training and trade show strategies ...to internet advertising/positioning and email/snail-mail drip ideas and optimization --to B2B sales calling and research.

2. Continuous Improvement *RULES!*

Quantum's leadership loves the business and is passionate about figuring out ways to improve every facet of the business. In fact, during the past 14 years the experimentation with every aspect of marketing and sales has continued. Indeed, competitors cannot figure out how Quantum can charge more for its services while winning more and more business. CI is the rule --and it *rules!*



Move Forward Fast!



3. Brain Trust Discussions

In our 14-year relationship with Quantum, one key to success has been that no one person is expected to have all the answers (nor all the right questions). One aspect of the powerful nature of a long-term partnership is that vendor and client, alike, learn, make mistakes, learn, try again, and figure out what is working (and why), and what isn't working (and why not). "Fail fast, fail cheaply" is a mantra at Quantum. KAAL and Quantum have a brain trust –as well as deep trust.



4. Ongoing Discoveries

When we started with Quantum we naturally looked at the "landscape" of their business and industry. Today, we continue to look at the landscape, and we continue to make discoveries from our experiments which help us adjust the sights on the marketing and sales rifle so we can hit the bull's eye within finely tuned market niches.

5. Ongoing Challenges: Complex Purchase Decisions often controlled by Procurement Agents in an environment of high emotional risk.

Yes, the way of the world is towards greater complexity. Greater complexity makes people fear making decisions that will blemish their careers. Sad, but true. One of our effective implementations on behalf of Quantum was to change how the company works with "Big Oil" companies, and with the powerful Procurement Agents –as with the actual users of Quantum's services. Our expertise in this area the company land some of its largest accounts –and at good fees/rates.



most well as helped

6. Outcomes

In 2008, 14 years later, Quantum has transformed from a solid "also ran" contender to become the 800 pound Gorilla in the c-store marketplace. The company has quadrupled in size and

profits, and continues to work closely (virtually daily) with KAAL. The price of success is that the challenges become tougher to figure out.

--Your company was the unanimous choice of everyone here and of my TEC group. We made a wise choice. You and your associates have made a significant contribution to our present and future success, because we are now on a growth path that is rapid, rewarding, and sustainable. You have our utmost respect.

Ray Crook, Jr., President

June 18, 1996

--Your analysis of the constraints in our sales pipeline were accurate. Your suggestions and mentoring are helping us move quickly. You and your associates dig in to the hard work. Given that we don't compete on price in a very price sensitive business and still win so many sales is a tribute to the process.

Randy Burke, VP Marketing

February 10, 2003

--We look to you for support in a wide variety of areas related to marketing and sales. Perhaps most important is how you work with us to strengthen strategies in obtaining and retaining our clients. We appreciate your insights as well as your integrity.

Barrett Crook, VP of Cool Clients August 5, 2008