

## Case Study:

DataSys Corporation  
Marlborough, Massachusetts

PI Worldwide 

# Building a Successful Small Business: “It's All About People”

**The Background:** Founded in 1996, DataSys Corporation is a Microsoft Certified Business Solutions Partner specializing in the implementation of Great Plains accounting solutions. DataSys works with small to mid-size companies to assess their financial and business management technology requirements, recommend solutions that will streamline and automate their processes, and implement and support those solutions. The company employs twelve people, posted \$2.1 million in revenue for 2004, and has a roster of more than 160 active customers.

**The Challenge:** Lisa Daigle, founder and president of DataSys, knows first hand the unique challenges of managing a successful small business. She learned early that not only is every team member individually critical to the company's performance, but the chemistry between team members is equally as important. When a person is not a good fit for a position or a team, it is felt throughout the organization. And when “people mistakes” are made, they can be costly, whether impacting bottom-line profitability, company morale, or customer perception. Conversely, the right chemistry is felt across all aspects of the organization, from customers to prospects to candidates, and most of all, to team members.

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*Lisa Daigle*  
**Founder and President**

Coupled with these classic small business challenges, DataSys faced the ongoing demand of building effective, productive teams from a seemingly disparate group of people. The challenge was exaggerated because at DataSys, teams are formed and reformed on a daily basis to meet specific project and support demands. And when the success and growth of the company is based on superior customer service and long-term client relationships, every team decision becomes critical. Lisa Daigle explains, “The more natural the fit between the team members and the client, the better the relationship is going to be. But I found it was a subjective process at best, always “guessing” at how to assemble the best teams.”

Lisa was not only building teams from a lean staff; in 2003 she also found the company facing a turnover problem. This was a particular problem for DataSys where the team members responsible for software implementation need to have a specialized skill set—an accounting background, a high level of technical skills, and well-developed people skills. Since that profile is not easy to fill, it could take up to a year to replace a key team member, resulting in a revenue loss in the neighborhood of \$200,000.

Although DataSys was a growing small business with high customer retention, Lisa knew that the company was capable of greater success if these team member challenges could be addressed. Standard industry practice might have been to add a managerial layer—adding cost and losing the benefit of the organization's flat structure. Lisa decided to roll up her sleeves and tackle the people issues directly.

**The Process:** Early in 2004, Lisa learned of the Predictive Index (PI) and the insights it could provide into the natural strengths each team member brought to their position. “Astounded by its accuracy,” she believed PI could make a significant difference for DataSys.

Lisa and a key member of her organization attended the PI Management Workshop. Initially “aghast” at the thought of having two critical people out of the office for several days, she now shares that the insight she gained on herself and her staff was “eye-opening” and well worth the time investment. Lisa was able to identify her natural, behavioral style and the impact it had on others in her organization. She learned from analyzing the profiles of DataSys team members that these were people who needed a soft approach when receiving feedback, were more risk averse, and responded to a more detailed style of communication. All but a few PIs showed decreasing morale, likely due to a lack of tailored communication. She realized immediately that she needed to adjust her communication style to account for these newly found insights.

Upon returning from the Management Workshop, Lisa administered the Predictive Index to all of her team members, and subsequently shared the insights with each individual. The reaction was immediately positive. Lisa's next step was to bring in DataSys' PI consultant to provide a team read for all 12 team members. This gave everyone further insight on how best to work with each other. “Naming and

acknowledging a behavior in itself provided the motivation to change. The Predictive Index also allows the team to discuss behavioral issues in a non-judgmental way, in the PI language that everyone understands. And PI ultimately puts the responsibility to set and meet goals on each individual."

In order to extend the value of PI into the company's day-to-day business practices, DataSys participated in two, one-day workshops from the PI-based, Predictive Leadership Series. Predictive Selling was attended by Lisa and the sales team. This one-day workshop helped them understand the impact of their personal styles, adapt their selling techniques based on specific behavioral clues from their prospects, and attain an efficient and effective outcome with each interaction.

More than half of the DataSys team members attended another workshop, People Smart Communications. Lisa understood the critical need for strong communication skills-internally within DataSys teams and externally with clients-and invested her team members' time in the workshop. The goal: help every person to understand their own communication styles and the impact they have on others, and to improve individual effectiveness.

**The Results:** The Predictive Index has made a measurable difference for DataSys. Lisa Daigle states, "Since using PI, implementation revenues have increased by 21% within one year, with no resultant increase in salary costs. These productivity gains came from increased individual and team performance. Turnover has decreased markedly. As a result, profitability is up considerably."

With these new insights, Lisa adapted her own style in response to the natural behaviors and drives of her colleagues. She used to motivate her people based on what she subjectively perceived their strengths to be. With PI, she now had an objective understanding of their behavioral strengths and could adjust her communication style to speak their language and provide motivation that was appropriate to their strengths.

Lisa also rearranged job responsibilities for several team members so they could be more successful. For example, certain aspects of the sales process, such as contract management, are now assigned to team members whose PIs are naturally suited to the tasks at hand. Also, Lisa saw that certain people in her organization who were in the biggest multi-taking roles, were actually best suited for less multi-tasking and took the necessary actions. As a result of these structural and style changes, people are now happier and morale is at an all time high, which makes everyone more efficient and productive than ever.

Lisa continues, "Our two person sales team generates the same revenue as a 5 or 6 person sales team of our competitors. Our revenue per person is unheard of in the industry. I know for a fact that DataSys was able to land a large prospect due to the skills we learned at the Predictive Selling workshop. We were able to identify early in the process how best to communicate with this potential customer. That ultimately resulted in the prospect's decision to switch from his current resource to DataSys."

Lisa sees a new level of success with team development as well. Faced with a project 10 times larger than any DataSys had ever implemented before, she used the Predictive Index to assemble the team. The result: "We delivered the project on budget and on time. Without the knowledge PI brought to the team selection and dynamic, I know there is no possible way DataSys could have accomplished this."

When asked how long it might have taken to reach the same insights without the Predictive Index, Lisa answers, "I do not believe we ever would have gained these insights without PI. I would have continued to think that we needed to improve the content or delivery of the message or work on skill building with individuals...trying to motivate the square peg to succeed in the round hole."

DataSys has used its success and increased profits to increase compensation, provide additional performance bonuses, improve its customer training facility, expand its benefits plan, and solidify its financial position. "PI turned out to be the silver bullet we needed to make the organization successful. Since using PI, the learning has never stopped. I don't think there is a day that goes by that we are not talking about the value that PI has brought to our organization. PI is as passionate and popular a topic as the Boston Red Sox."

**The Predictive Index®** is a unique, in-house management tool used by executives throughout the world for almost 50 years to develop leaders and build successful businesses. PI Worldwide is an international association of management consultants who help companies use PI to manage their most important resource—their people.