



# Delivering Cloud-Based Controls for Mechanical Keys with a Human Touch

**W**ith our growing dependence on automation, service bots, and artificial intelligence, it can be rare to find a vendor that delivers innovative solutions through partnership. Thingamajigs, widgets, and bots can bring us all efficiency, but there is still magic in the human element that can't be quantified.

In May 2018, The Fresh Market (TFM), a North Carolina-based specialty grocery chain, looked to enhance and simplify distinct areas of operations with simple security upgrades. With limited human capital, they leaned on vendor partners to help. TFM leadership wanted vendors who provided best-in-class service and partnership to work with their asset protection and operations teams. By aligning these resources, TFM was able to define a full 160-store conversion to a modern key-control program. Each store required an initial cost-effective site survey solution, prompt materials turnaround, coordinated installation, and on-site training of new procedures designed to culminate in an advanced key-control program.



By August 2018, TFM began designing their key-management processes to create a more secure environment for their stores and to use a product-service offering that achieved an ROI after the implementation.

These goals are common among organizations, but capital is hard to come by.

InstaKey® Security Systems became TFM's chosen vendor because they provide custom key-control programs complete with user-rekeyable mechanical locks; restricted, serialized keys; records-management software to back it all up; and most of all, a passion for partnership.

With this new key-control program now in place for TFM, we will explore how the best solutions come from open collaboration and human interaction, and review how they utilized numerous innovative technologies to achieve on-time and on-budget full-store rollout completion.



## Digital Site Survey (DSS) Process

Asset protection and InstaKey collaborated on combining two survey practices: (1) a user-friendly lock hardware site survey form listing all doors in the store and (2) taking pictures of all door-lock types. Rather than spending budget dollars on having locksmiths perform these surveys, TFM AP conducted them at the stores and utilized a free third-party smart phone app called Tiny Scanner to upload and transmit the site survey

form and digital images from their phones. This app serves as a portable document scanner, creating PDFs from photos, which were uploaded directly to InstaKey's SecurityRecords.com® Key Control software. Upon receipt, InstaKey personnel were able to remotely evaluate all lock types from the survey information and imagery. For any outlying locations where AP personnel couldn't reach, InstaKey utilized local locksmiths to collect the surveys using the custom site survey form process. This automation technique using internal resources saved TFM thousands of dollars upfront.

## Project Management and Tracking Process

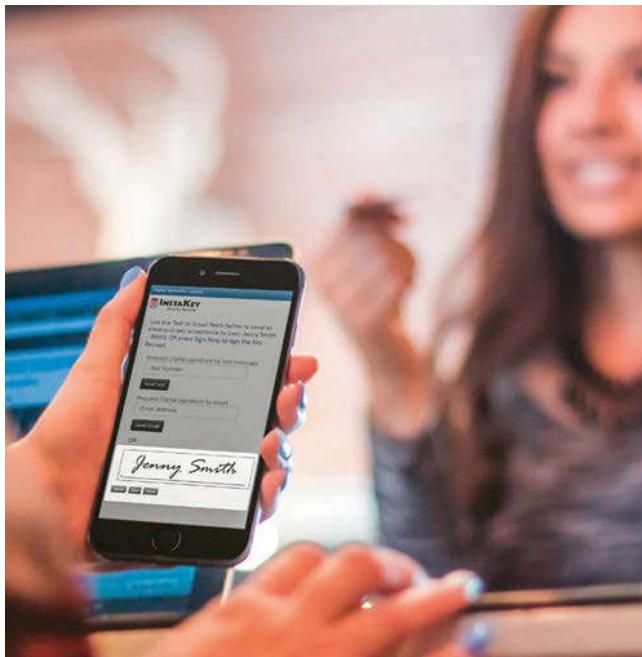
To best coordinate the rollout, InstaKey and TFM AP managed a master conversion list (MCL) designed to track



all phases of each store's progress. This allowed visibility from data collection to product shipment/delivery and installation coordination. It also accounted for budget management and tracking the project's pace. This MCL was reviewed weekly between the teams to share overall progress and delays.

## Digital Key Holder Assignments and Tracking

Prior to deployment, asset protection and InstaKey discussed how to best capture the user population (in other words, key holders). Knowing that data is only useful when it's updated, asset protection provided a human resource data feed to InstaKey, creating a dynamic user population. Data can be shared via API or SFTP interface. Once uploaded into SecurityRecords.com, any serialized key can be assigned to only authorized employees. This forethought solution allowed for dynamic changes and keeps the key management fresh daily. With the documented assignment of a unique serial-numbered key to a key holder, the key holder's



accountability improves for the security of that specific key. SecurityRecords.com's Key Holder Update module digitally assigns and tracks keys to the distinct user or key holder. The best part of this solution is that keys can now be assigned to authorized key holders remotely via any smart device. A URL link is sent via text or email directly to the key holder, where the module captures their signature digitally accepting the key assignment. No apps, no PCs, just smart people using their smart devices. Store management and asset protection can now remotely track each key, who has it, and what it opens in real time through SecurityRecords.com.

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— Joe Oliveira,  
The Fresh Market

## Results

This strategic combination of human capital, innovative technologies, and open collaboration made it possible for TFM to standardize their processes and procedures around key management and immediately create the secure environment for their 160 stores in only twelve weeks. When a client can improve security, establish an accountable culture to keep track of keys, prepare for future cost-effective rekeys when keys are lost, and give tools to operations that help simplify the management, there is sure to be an ROI. Proof will be in the continued partnership and future assessments of this key-control program.

After the conversion project was completed, Joe Oliveira, CFI, TFM's director of asset protection, expressed his satisfaction by saying, "Converting an entire company in under three months has to be some type of world record. Every time I work with InstaKey, their commitment to clients and to projects shines through with personal and corporate integrity. The program is a huge success, has become part of our culture, and is helping us better protect our team members, guests, product, cash, and data. We couldn't have done it without the help and support of such a great partner."

With a project of this scope and timeline, InstaKey's focus on consistent communication and dedication to maintaining the deliverables were critical components in making sure the outcomes TFM sought were achieved. Also critical to the success of the project was the technology utilized within the cloud-based records management SaaS software, SecurityRecords.com, which was used to organize and streamline the rollout, providing simpler oversight of the program thereafter. ■

