A World of Opportunity

*Exploiting the power of consumer data for breakthrough*

*Kevin Abele*
Agenda

- Perspective from the 2012 CMO study
- State of the industry and factors shaping our future
- A little bit on IBM
- The enormity of the opportunity
- The possibilities for Marketing, Sales, and Supply Chain
- Real case studies of success
- Observations for the future
- Open questions
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CMOs admit they are not prepared

79%
Expect high/very high level of complexity over five years

48%
Feel prepared for expected complexity

31% complexity gap

“From Stretched to Strengthened; Insights from the Global Chief Marketing Study”
www.ibm.com/cmostudy
Specific challenges reflect growing complexity

**Figure 4**

*The biggest headaches:* The four most prominent challenges for CMOs are the data explosion, social media, proliferation of channels and devices, and shifting consumer demographics.

1. Data explosion
2. Social media
3. Growth of channel and device choices
4. Shifting consumer demographics
5. Financial constraints
6. Decreasing brand loyalty
7. Growth market opportunities
8. ROI accountability
9. Customer collaboration and influence
10. Privacy considerations
11. Global outsourcing
12. Regulatory considerations
13. Corporate transparency

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“From Stretched to Strengthened; Insights from the Global Chief Marketing Study”

Specific challenges reflect growing complexity

1. Data explosion
2. Social media
3. Growth of channel and device choices
4. Shifting consumer demographics

“From Stretched to Strengthened; Insights from the Global Chief Marketing Study”
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CMO’s Recognize the Need to Invest in Analytics

**Consumer Products Underpreparedness**

*Percent of CMOs selecting as “Top 5 Factors”*

<table>
<thead>
<tr>
<th>Factor</th>
<th>CMO Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data explosion</td>
<td>85%</td>
</tr>
<tr>
<td>Social media</td>
<td>71%</td>
</tr>
<tr>
<td>Channel &amp; device choices</td>
<td>66%</td>
</tr>
<tr>
<td>Shifting demographics</td>
<td>68%</td>
</tr>
<tr>
<td>Financial constraints</td>
<td>52%</td>
</tr>
<tr>
<td>Decreasing brand loyalty</td>
<td>61%</td>
</tr>
<tr>
<td>Emerging markets</td>
<td>61%</td>
</tr>
<tr>
<td>ROI accountability</td>
<td>57%</td>
</tr>
<tr>
<td>Consumer collaboration</td>
<td>54%</td>
</tr>
<tr>
<td>Privacy considerations</td>
<td>33%</td>
</tr>
<tr>
<td>Global outsourcing</td>
<td>63%</td>
</tr>
<tr>
<td>Regulatory considerations</td>
<td>60%</td>
</tr>
<tr>
<td>Corporate transparency</td>
<td>39%</td>
</tr>
</tbody>
</table>

**Need for change to deal with data explosion**

*Percent of CMOs indicating high/significant need*

<table>
<thead>
<tr>
<th>Change Area</th>
<th>CMO Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invest in technology</td>
<td>70%</td>
</tr>
<tr>
<td>Integrate insights</td>
<td>63%</td>
</tr>
<tr>
<td>Understand analytics</td>
<td>64%</td>
</tr>
<tr>
<td>Rethink skill mix</td>
<td>66%</td>
</tr>
<tr>
<td>Collaborate with peers</td>
<td>49%</td>
</tr>
<tr>
<td>Validate ROI</td>
<td>54%</td>
</tr>
<tr>
<td>Address privacy</td>
<td>23%</td>
</tr>
</tbody>
</table>

Source: Q8 How prepared are you to manage the impact of the top 5 market factors that will have the most impact on your marketing organization over the next 3 to 5 years? n=6 to 136; Q20 To what extent will the opportunity to collect unprecedented amounts of data require you to change? n=171 to 180
CEOs identify consumer insights as the most critical investment area

Drawing insight from information – Areas of improvement

<table>
<thead>
<tr>
<th>Area</th>
<th>Consumer Products</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumers</td>
<td>76%</td>
<td>73%</td>
</tr>
<tr>
<td>Supply chain</td>
<td>61%</td>
<td>40%</td>
</tr>
<tr>
<td>Sales</td>
<td>55%</td>
<td>49%</td>
</tr>
<tr>
<td>Markets and competitors</td>
<td>46%</td>
<td>44%</td>
</tr>
<tr>
<td>Operations</td>
<td>45%</td>
<td>50%</td>
</tr>
<tr>
<td>Human resources</td>
<td>41%</td>
<td>43%</td>
</tr>
<tr>
<td>Risk management</td>
<td>33%</td>
<td>38%</td>
</tr>
<tr>
<td>Financials</td>
<td>32%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: IBV Global CEO Study 2012. Q23 “In which areas do you plan to improve your ability to draw meaningful and executable insights from available information?” (Global n=1609 to 1658) (Consumer Products n=99 to 101)
The biggest challenge today is what’s happening with consumers...they are Smarter and empowered.... The consumer is king.
Diverse Data Source Management is needed...

<table>
<thead>
<tr>
<th>Demographic</th>
</tr>
</thead>
<tbody>
<tr>
<td>BTC</td>
</tr>
<tr>
<td>BTTBTC</td>
</tr>
<tr>
<td>Cluster</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>POS and Panel</th>
</tr>
</thead>
<tbody>
<tr>
<td>POS and Panel</td>
</tr>
<tr>
<td>Dunnhumby, IBM CRP, Retail Solutions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Brand Health and Market Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Health</td>
</tr>
<tr>
<td>Brand Strength Metrics</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Digital Marketing</th>
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<tbody>
<tr>
<td>Digital Marketing</td>
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<table>
<thead>
<tr>
<th>ERP</th>
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<tbody>
<tr>
<td>ERP</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade</td>
</tr>
</tbody>
</table>

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### Examples of retailers sharing...

|------|---------------------|-------------|------------|------------|------|--------------|----------------|-------------|-----------|-------------|------------------|--------|------|---------|-------------|-------------|----------|-----------|-------------|------------------|------------------|--------|---------------------|-------------|------------|----------------------|---------------------|------------------|

### Third-Party Data Integrated

| AC Nielsen | Acosta | Amerisource Bergen | Arclight | Avnet | C&S | Cardinal Health | CrossMark | D & B | DMA | Dodge | dunnhumby | Granger | Harte Hanks | Henry Schein | IMS | InfoAccess | Invacare | IRI | Kmart/Sears | McKesson | McLane | McLane | MSA | MSA | ND | ND | ND | NFO | NPD | NRX | Owens & Minor | Polk | Retail Link | Retail Solutions | Spectra | Spin | Super Valu | Partners Online | TD Linx |
Data: The Key To Relevance

**Transactional**
Information you have about previous purchases and interactions with individual customers

**Digital Behavior**
Covers what people are doing and have done online, from surfing patterns to various digital interactions they may engage in across your web and mobile sites

*Can tell you, for example, which pages or sets of products on your site people have spent the most time exploring (or ignoring!)*

**Social Data**
Includes all data related to the social graph as well as any social information that customers may have chosen to share with you (or, perhaps, unwittingly shared with you by agreeing to sign-in to your site using Facebook or Twitter)

Cut and Dry / Transparent

Less Transparent, Predictive
Comprehensive Analytics – Transactional and Social Combined

Traditional Approach
Structured, Logical, Pre-define

New Approach
Ad Hoc, Creative, Holistic, Intuition

Structured Repeatable Linear

Transaction Data
Internal App Data
Mainframe Data
OLTP System Data
ERP data

Unstructured Exploratory Iterative

Web Logs
Social Data
Text Data: emails
Sensor data: images
RFID

Enterprise Integration

Traditional Sources

Data Warehouse

Technology

New Sources

Enterprise Integration
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Comprehensive Solutions for Consumer Products

Domain Areas

<table>
<thead>
<tr>
<th>Domain Areas</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing</td>
<td>Key provider of Business Analytics and optimization capabilities and consulting, including analytics roadmaps, rapid value assessments, return on investment</td>
</tr>
<tr>
<td>Customer (Sales)</td>
<td>World's second largest software provider; spanning critical business applications, middleware, data management / big data, analytics, and collaboration</td>
</tr>
<tr>
<td>Supply Chain</td>
<td>Currently the #1 global server vendor and storage services provider with the most comprehensive range of offerings for companies of all sizes.</td>
</tr>
<tr>
<td>Information Mgt</td>
<td>World’s largest business and technology services provider with more than 175,000 services professionals</td>
</tr>
<tr>
<td>Business Partners</td>
<td>Over 15,000 partners in 75 countries; 100 Consumer Products industry businesses participate in our Partner Industry Network</td>
</tr>
<tr>
<td>Research</td>
<td>World’s largest IT research organization consisting of over 3,000 scientists; Received over 5,000 US patents in each of the past three years, most of any organization.</td>
</tr>
</tbody>
</table>
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Analytically Sophisticated Enterprises Outperform

- 1.6x Revenue Growth
- 2.0x EBITDA Growth
- 2.5x Stock Price Appreciation

What makes them smarter? They are able to...

- Treating Information as an Asset
- Across Channels and Value Chain (upstream and/or downstream)
- Exception Based, Forward Looking, Action Oriented
- External Focused Foresight

Source: IBM Center for Applied Insights, State of Smart Study, 2012
What are the results? There are specific, measurable business benefits spanning the entire CP organization.

- **More relevant product innovation** drives 3% average growth vs. category.
- **5% Improvement in margin in Trade Promotions performing on plan**.
- **18% improvement in revenue during Trade Promotional period**.
- **Better Portfolio marketing drives engagement; engaged consumers are 10 X more likely to purchase**.
- **Better Retail Execution drives 2% to 4% increase in margin**.
- **Reduction in cost of unused slotting fees up to 0.5% of Trade Promotion spend**.
- **Reduce channel inventory by 20% and up to 30% reduction in safety stock through improved Retail Execution**.

*References:
- 2010 GMA McKinsey, Nielsen Channel Management Survey
- AMR Research Report May 2007
- Gartner Research “Promotion Display Optimization Case Example: Consumers, Suppliers and Giant Eagle, Too, Emerge as Winners” April 2010
- Gartner Research “Evolving to a Demand-Driven Value Chain: Not Easy but Required”, April 2010.
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Leading CP companies build DSRs to manage big data volume, gain insights to trade promotions and marketing investment, and enable critical applications and processes.

**Demand Signal Repository (DSR)**

- **Master Data (Customer/Product/Price)**
  - Customer, product, price

- **Promotion Plans Marketing Plans**
  - Dates, type, target price, expected sales

- **Territory Coverage**
  - Sale rep allocation

- **Distributor Data**
  - Inventories, customer orders, shipment plans

- **Repository**
  - By store, by SKU, by store, total units, # of transactions, total sales, OOS flags, etc

- **Source to staging**
  - OOSs, promo compliance, competitor info, prices

- **Data and calculations**
  - Household purchases

- **Reporting layer**
  - Field sales teams

- **Reports, drill-downs, alerts**
  - Share, promo indicator, baselines, elasticity

**Critical applications support**

- Trade promotion optimization
- Replenishment planning
- Settlement (ERP finance)
- Merchandising planning
- Category mix management
- Marketing campaigns / New items

**Additional resources**

- Nielsen
- SymphonyIRI Group
- Ipsos
How the solution addresses needs and challenges

Benefits of this Approach

- Improved success of **new item launches** at the retailer and store level
- Maximized ROI on **trade promotion** activity—pre, in-flight and post event analysis.
- Improved **product development** through enhanced consumer insight
- Better visibility of product movement off the shelf for customer **call centers**
- Better recognition and reduction of **out-of-stocks**.
- Improved **demand forecasting** through more granular demand inputs.
- Improved optimization of **supply chain**.
- Better and timely collaboration with **retailer partners**, through shared insight, can be ‘game changing’
- Improved **shopper insights and assortment** rationalization
- **Executive management visibility** and reporting – strategic

All leading to... **Improved sales and decreased costs** --- direct impact on the bottom line of the company; ROI
### Business application – Doing things better, and doing better things

#### Phase I
- Weekly POS, Retail POS, DC to Retail, etc.

#### Phase II
- Add: Metadata, attributes, increase POS frequency

#### Phase III
- E-commerce, loyalty, receive more daily data, advanced modeling, social media

#### Phase IV
- Next-Generation, differentiating combinations

<table>
<thead>
<tr>
<th>#1</th>
<th>Demand Planning / Forecasting</th>
<th>Store volume groupings by POS sales data</th>
<th>Item-level forecasting using daily POS data</th>
<th>Daily item-level forecasting using daily POS data and modeling</th>
<th>Multi-data source, accurate downstream global forecasting</th>
</tr>
</thead>
<tbody>
<tr>
<td>#2</td>
<td>On-Shelf Availability / OOS</td>
<td>Weekly OOS understanding and Chronic OOS views</td>
<td>Abnormally low sales and real-time correction</td>
<td>Predictive OOS and daily demand sensing - key customers</td>
<td>Full daily sensing; accurate forecast for on-time replenish</td>
</tr>
<tr>
<td>#3</td>
<td>Inventory Optimization</td>
<td>Store counts by item rolled and grouped by on-hand inventory</td>
<td>Store volume groupings by POS sales data</td>
<td>Combine POS, shipments, on-hand - complete sell thru picture</td>
<td>Networked multi-enterprise for global inventory optimization</td>
</tr>
<tr>
<td>#4</td>
<td>New Product Introduction</td>
<td>Weekly void, volume, and price compliance reporting</td>
<td>Full daily understanding with calc for $ impact on compliance</td>
<td>Full program in place for near real-time adjustments on launch</td>
<td>National rollup of daily item launch with dashboard metrics</td>
</tr>
<tr>
<td>#5</td>
<td>Shelf / Assortment</td>
<td>Weekly understanding of shelf dynamics by cluster</td>
<td>Driver stores analysis based on daily/week POS</td>
<td>Targeted store-by-store assortment and shelf planning</td>
<td>Store to Country visibility of product assortment</td>
</tr>
</tbody>
</table>

**ROI**

1. #1
2. #2
3. #3
4. #4
5. #5
Business application – Doing things better, and doing better things

Phase I
Weekly POS, Retail POS, DC to Retail, etc.

Phase II
Add: Metadata, attributes, increase POS frequency

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E-commerce, loyalty, receive more daily data, advanced modeling, social media

Phase IV
Next-Generation, differentiating combinations

ROI

#6 Brand Insights / Portfolio
Weekly reporting of brand metrics (share, volume, etc.)
Complete opportunity for micro + neighborhood marketing
Merge of POS + social buzz to complete consumer affinity
Exec Level Strat Acquisition + Campaign management

#7 Trade Promotion and Pricing
Weekly Post Promo Tracking
Store-Level Promo Analysis with In-Promo Adjustment
Trade Promotion Optimization with Daily Insight
End-to-end Profitability w/ Exec Rollup country X country

#8 Product Development
Trend & portfolio analysis on volume and other store metrics
Strategic segmentation analysis by cluster/demography
Early new trend and public perception analysis
Exec Dashboard for global corporate + brand acquisition

#9 Consumer Segmentation
Basic pre-defined clustering on weekly data
Strategic segmentation with loyalty overlay
Full view of consumer with real-time internet sentiment
Micro-consumer targeting with CMO dashboard

#10 Executive Insights
National, region, and key account consensus reporting
National to neighborhood drill down with key metric alerting
Corporate strategy and public perception inclusion on buzz
Executive Level Strategic Acquisition Analysis
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A Global Consumer Healthcare Company harmonized Retailer direct POS with internal data (SAP, MDM, Shipments) and Panel to provide sales and marketing analytics.

**Discussion points**

- Integrated over a dozen external data sources with internal data using DSR engine to drive improvements e.g. in on shelf availability
- Realized the value of timely data and streamlined reporting and analytics for use with retail partners.
- Pre-built best-practice workflows for core CPG processes
- Easy to create custom workflows by end-users
- Simulation and forecasting module
- Automated
- Customized
**Example: New Item Launch**

- How can I track immediate results on my new item launch to ensure maximum impact during the first 12 weeks of the launch? I need to ensure success!

**Business Value:**
Fast tracking capability, with full understanding of retail acceptance, distribution build, and profit impact. Minimize issues by having full visibility early on.

**Daily understanding of key item launch metrics to ensure maximum success during first 12 weeks of launch**

**Track success of item launch since launch date, inclusion of financial impact; course correct problem areas as needed**
Example: POTENTIAL Out-of-Stocks

How can I forecast Out-of-Stock situations before they occur so I can course-correct?

Business Value:
Visibility into Out-of-Stock situations PRIOR to their occurrence so that highest priority SKU/Store situations can be corrected without $ impact.
Foundational DSR -- Trade Marketing and Event Analysis

Business Challenge
- Client desired to greatly improve their improve planning and overall trade effectiveness
- Needed a much better way to handle their data comprehensively for trade, to allow for better harmonization and rapid response / change
- Simple analytic / reporting platform required for trade analysts & account teams

The Approach
- Analyze customer promotional activity at the event-level and measure plan versus actual volume, spend and retail execution
- Refine promotional strategies and tactics to drive improved bottom line results with each customer
- Evaluate promotional tactics across customers in a category to drive pricing and promotional strategies for future periods

Business Benefits
- $100,000,000 + impact at current pace
- $20 B +
  - 170 countries
  - 18,000 events
  - 27 data sources
  - 100 banners
  - $100 million savings

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Solution Schematic

Solution Component

1. Integration of Data Sources
2. Harmonize & Validate Data
3. Edit, Align & Override Data
4. Analyze Reports
5. Export and Distribute via Excel
6. Alerts and Automation
Example: Promotion Execution

How can I adjust my promotion execution while in-flight to maximize volume and profitability at the Retailer?

- Provide near real-time alerting on store merchandising and pricing compliance

Business Value:
In-flight promotion alerts to enable course correction on highest priority stores, quantified by lost $. Large financial opportunity to improve promo results.
Sara Lee’s Sustainable Platform for Actionable Insights

Demand data is automatically sourced, harmonized and analyzed through the technology engine

Consolidated into one logical Database

Source: IBM Information On Demand Conference 2011: ‘Smarter Supply Chain with Demand Signal Repository’
Sara Lee’s Results – based on analytics

Results

- Lower operating costs
- Greater innovation speed and success
- Increased marketing and promotion effectiveness
- Improved promotion execution
- Full integration with existing execution applications

Analytics

- Pricing elasticity
- Promotion lift
- Assortment
- Compliance
- Execution
- Demand planning

Insights...Actions...Value

Source: IBM Information On Demand Conference 2011: ‘Smarter Supply Chain with Demand Signal Repository’
Social media insights leveraging IBM state of the art research capabilities

In just over a week IBM scanned 1.5 billion social postings and 500,000 Vegemite mentions

Most successful marketing campaign in brand history – resulting in several point gain in sales/volume

“...the first time ever we had Australian Moms taking 2 jars of Vegemite off the shelf at the same time!”

- Simon Talbot, Head of Corporate Affairs, Kraft Foods Australia and New Zealand
Emerging Topics View

Social Snippets
(e.g. New Product Insight)
Localized Sentiment Dashboard with Trial/Repeat / Sales / Distribution Build

Understanding Brand Advocates

Build into your Ongoing Marketing / Campaign Plan
Large International CP Company
*Rich consumer understanding, deep relevance, ongoing trust*

Social insight about the brand, themes being discussed, the competitors, keyword searches, drill down to snippets to understand the “ah-ha”, geographic social sentiment by marketing region

Engaged Consumers

Brand advocates — find them, prioritize them, engage & track their development & influences to the communities they are passionate about

Understand if brand is meeting the needs of consumers in a unique & relevant way

Understand which marketing programs are driving revenue and profit and which are not

Build trust and earned media … continuously re-optimize marketing plans
Social ‘Mission Control’ Center for Gatorade

The need

- Gatorade brand was in need of a turnaround – 3 year slide in sales
- Brand has become unpopular with teen consumers (key demographic)
- Powerade continues to grab share (17% US sales increase in H1 2010 compared to 7% for Gatorade)

The solution

- A social media strategy for the brand
- An organization and specific roles
- A set of policies to govern listening and engaging behavior
- A physical space and technology modelled on military concepts
- Data integration, visualization, simple analysis – analytics, affinity, emerging topics, sentiment
Social ‘Mission Control’ Center for Gatorade

Harvest
- Watching ad-traffic and social media side-by-side
- Enable better 360 marketing performance (e.g. changes to banner ads, prioritization of celebrities on sites etc)

Listen
- Craft consolidated view of brand’s internet image and key influences

Engage
- On-line engagement with influencers via Twitter, Facebook etc

Learn
- Real-time weighting of opinions
- Loyalty measures
- Influencer mapping
- Conventional web analytics (e.g. length of stay, click thru etc)
- Data integration software from IBM
- Visualizations, dashboards

The goal of the project is to “take the largest sports brand in the world and turn it into largest participatory brand in the world.”

Driven by services and products from IBM, Radian6 and others.
Growing consumer loyalty -- optimized consumer contacts and experiences

**Challenge**
- Drive brand loyalty through relevant and rewarding consumer experiences & relationships

**Solution**
- Designed and is managed by IBM. IBM helped Coke to create:
  - Omni channel experiences – social, mobile, desktop web
  - Consumer relationship marketing database
  - Sophisticated reporting and tracking
  - Fully integrated CMS
  - Analytics Dashboards
- Engaging experience for consumers
  - Consumer engagement increased by encouraging consumers to enter pin codes, enter contests and sweepstakes, take surveys, accumulate reward points and select rewards for the points that they have accumulated either on the web or on mobile devices

**Results**
- 18 million registered MCR consumers and growing
- Hundreds of prestigious business partners, advertisers, user-profile targeted and scheduled promotions

**What this means**
- Drive consumer loyalty, engagement and value by creating highly relevant, personalized and effective consumer experiences and contact strategies.
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Some suggestions in your evolution on data…

1. Start small, with an eye on the ‘bigger enterprise’ prize
2. Know where your biggest ROI ‘bang for the buck’ is
3. Have an information agenda / information plan holistically
4. Do your homework, especially in data management, on potential partners
5. Consider an ‘analytics roadmap’
6. Interconnection of marketing, sales, supply chain
7. Clear roles and responsibilities needed (e.g. IT = service delivery; Business = requirements, process definitions; Governance = master data and data standards)
8. Solid data model first, reporting second
Some Observations I’ve seen that may continue…

1. The Chief Executive Consumer … *instrumented, interconnected, intelligent*
2. The unification of marketing, sales, supply chain
3. The working ‘marriage’ of the CIO and CMO is a must
4. Relevance, relevance, relevance
5. The winners in marketing are those seen as providing ‘service’, rather than pushing product.
   - Consumers are getting better at filtering out the marketing noise.
   - At the same time, however, they are willing to engage in a value exchange with companies and provide more information about themselves in return for more targeted information, special treatment, and, *service*. 
One way to start... an ‘information agenda’ approach

Step 1 – Evaluate existing Information Strategy and Roadmap and prepare for the workshop

Step 2 – Balance Information Strategy against Industry Imperatives and desired maturity

Step 3 – Conduct on-site workshop and interviews with LOB and IT staffs to prioritize high value business areas

Step 4 – Assess information architecture maturity & readiness / ability to achieve high value business outcomes

Step 5 – Assimilate findings, analyze and prioritize gaps, identify potential projects, develop recommendations and create the Information Agenda roadmap

Step 6 – Present final report, deliver Information Agenda recommendations and roadmap and prepare for future phases
Questions and Answers