250 CEO, CMO and Agency Vision Interviews
10,231 marketing participants from 92 countries
1,064 US Participants

**Seniority**
- 30% Board/EVP/SVP
- 21% VP/Director
- 19% Manager
- 30% Other

**Type of Business**
- 48% B2C
- 18% B2B
- 33% Both
- 1% Other

**Industry**
- 41% Media/Communications
- 18% Business and financial services
- 12% Consulting
- 8% Manufacturing
- 8% Healthcare
- 7% FMCG
- 6% Others

**Discipline**
- 63% Marketing
- 28% Communications
- 9% Others
A lot is changing in the Marketing World
WHAT we do in Marketing is changing beyond recognition
Marketing Organization Chart

...but HOW we organize looks the same
The role of Marketing
and CMO leadership
...to drive business growth
NOW:

Characteristics of Winning Marketing 2020 Brands
At/After Lunch:
CMO Round Table:
Organizing for Growth
Top Marketing 2020 Opportunities & Challenges
Collaborating with Consumers

Social marketing

Globalization

Purposeful Marketing
Opportunity to influence business
Top Marketing 2020 Challenges
Infobesity
Privacy risks
Organizational silos
Doing more with less
Touch point consistency
Lack of influence
Ability to stay current
So, what does it take to win?
Winning Marketing 2020 brand characteristics

- Big Insights
- Purposeful Positioning
- Total Experience
Organizing for growth

Big Insights
Purposeful Positioning
Total Experience
Winning in Marketing 2020

Big Insights
Purposeful Positioning
Total Experience

BUILD
CONNECT
INSPIRE
ORGANIZE
FOCUS
NOW:
Winning Marketing 2020
Brand Characteristics

Big Insights
Purposeful Positioning
Total Experience
We have the right data and analytics available to measure marketing effectiveness. We are able to leverage all data and analytics available to improve our marketing effectiveness.
I believe that brands with a clear societal purpose will drive more business growth.
Purposeful Positioning

A Book By

JIM STENGELE

GROW
Purpose based *functional* benefits
Purpose based *emotional* benefits
Purpose based societal benefits
Purpose drives business growth

Advantages to be achieved

Impact of having a societally purposeful brand (Q3602) on marketing KPIs (current performance versus competition)

- Q9 Market share
- Q11 Lead generation
- Q13 Marketing efficiency
- Q14 Net promoter score
- Q15 Consumer engagement
- Q16 Revenue growth
- Q17 Marketing return on investment
- Q18 Brand health

With purpose
Without purpose
Big Insights
Purposeful Positioning
Total Experience
Brand value in a digital world

Value Proposition

# of Touch Points and Experiences

© 2013 EffectiveBrands
Nike’s share of experience

Nike Experience Curves
Perspective of the Runner

Key Elements of the Customer’s Experience

- Price of shoe and system
- Heart rate monitoring
- Running computer
- Quality of shoe
- Brand image, self-identification
- Tracking runs
- Motivation to run
- Integrating music and running
- Participating in social network
- Emotional association with running experience
NIKE VIDEO HERE PLEASE
Organizing for Growth
Now:

CMO Round Table: Organizing for Growth

Big Insights
Purposeful Positioning
Total Experience
Connect:

Marketing is too important to be left just to marketers
Seamless total customer experience
Marketing works closely with the CEO on business strategy

Marketing approves large growth-oriented investment decisions

Marketing Influence
Partners for growth
Marketing’s Influence

“Marketing works closely with the CEO ...

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<tr>
<th></th>
<th>Agree</th>
<th>Neither</th>
<th>Disagree</th>
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</thead>
<tbody>
<tr>
<td>CPG</td>
<td>64%</td>
<td>30%</td>
<td>6%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>50%</td>
<td>38%</td>
<td>12%</td>
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<tr>
<td>Financial</td>
<td>49%</td>
<td>39%</td>
<td>12%</td>
</tr>
<tr>
<td>Energy &amp; Utilities</td>
<td>34%</td>
<td>47%</td>
<td>19%</td>
</tr>
<tr>
<td>Health Care</td>
<td>41%</td>
<td>42%</td>
<td>17%</td>
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Big Insights
Purposeful Positioning
Total Experience
Business acumen is the license to operate and ticket to influence
The CMO tenure

SpencerStuart

2004: 23.6 months
2005: 23.5 months
2006: 23.2 months
2007: 26.8 months
2008: 28.4 months
2009: 34.7 months
2010: 42.0 months
2011: 43.0 months
2012: 45.0 months
Engineer less – Engage more
Engage internally

I am proud of my brand’s purpose

In our company we ensure that all employees are fully engaged with our brand purpose

We continuously engage our consumers and customers around our brand’s purpose

- Under Perform
- Overperform

72
84
43
60
47
63
‘Googliness’
EMBEDDING SUSTAINABILITY

In order to realise sustainable growth, we are integrating sustainability into our strategy, brands and innovation. We are working with our customers and suppliers, engaging employees and forging new partnerships.

OUR BUSINESS STRATEGY

With 7 billion people on our planet, the earth’s resources can be strained. This means sustainable, equitable growth is the only acceptable model of growth for our business. We believe growth and sustainability are not in conflict. In fact, in our experience, sustainability drives growth. See Our Compass Strategy.
$2,000 “Leave Now” check
Focus drives growth
“Local marketing understands the global strategy”

“It’s clear what the strategy is for the brand I’m working on”

Underperformer | Overperformer
---|---
49% | 59%
56% | 70%
"I support the global strategy of the brand I am working for - % AGREE"

<table>
<thead>
<tr>
<th></th>
<th>EVP</th>
<th>VP/MD</th>
<th>Manager</th>
<th>Other</th>
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</thead>
<tbody>
<tr>
<td>Global</td>
<td>83%</td>
<td>80%</td>
<td>83%</td>
<td>82%</td>
</tr>
<tr>
<td>Regional</td>
<td>72%</td>
<td>74%</td>
<td>75%</td>
<td>73%</td>
</tr>
<tr>
<td>Local</td>
<td>66%</td>
<td>64%</td>
<td>63%</td>
<td>56%</td>
</tr>
</tbody>
</table>
Orchestration & Integration
Founder — Chief Experience Officer
Collaborating more closely with IT, Finance and HR

% Always

<table>
<thead>
<tr>
<th>Collaboration</th>
<th>Under Perform</th>
<th>Overperform</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing works closely with IT</td>
<td>18</td>
<td>29</td>
</tr>
<tr>
<td>Marketing works closely with HR</td>
<td>14</td>
<td>26</td>
</tr>
<tr>
<td>Marketing works closely with Finance</td>
<td>30</td>
<td>40</td>
</tr>
</tbody>
</table>
To

Product Manager

Promotion Director

Marketing Strategies Manager

Market Research Director

CMO

Advertising Director

Public Relations Manager
New Marketing Roles

Think
- Analytics
- Marketers

Do
- Production/Content
- Marketers

Feel
- Engagement
- Marketers
2013 ANA SURVEY REPORT

The Rise of the In-House Agency

58%
More agencies

% that works with more than 5 agencies

- Under Perform:
  - 33

- Overperform:
  - 53
From Global to *Networked*
From Local to Communities
Building Marketing capabilities drives growth
Growing marketing excellence

Capabilities have the strongest correlation to revenue growth, brand health and MROI.
From Digital Marketing to Marketing in a digital Age
diageo announces multi-million dollar partnership with facebook

Posted on 19th September, 2011 by Fast Web Media

Diageo have announced plans to step-up their multi-million dollar strategic partnership with Facebook, which will drive unprecedented levels of integration and joint business planning and experimentation.
CMO Round Table: Organizing for Growth

Big Insights
Purposeful Positioning
Total Experience
What are you doing to prepare clients and colleagues for this new world order?

info@marketing2020.org
How do you move your teams from Big Data to Big Insights?

info@marketing2020.org
How do you best engage the CEO ... and the rest of the organization?
How different will your marketing organization look 5 years from now?

info@marketing2020.org
What are potential traps for CMOs in driving such aggressive change?
What’s Next?

MARKETING 2020
ORGANIZING FOR GROWTH
What’s Next?

- Marketing2020 **CMO Round Tables** in NYC, Chicago, LA and Las Vegas (CES)
- Benchmarking: **Marketing2020 PulseCheck**
- In-Company **M2020 workshops**

- Brand **Purpose** Round Tables
- Marketing **Excellence** Round Tables
- **Organization** Round Tables

Contact: nprimola@ana.net
What’s Next?
What’s next for YOU?

Top Marketing2020 CMO Priorities

1. Lead by example in a digital world
2. Engage the total organization
3. Inspire and empower vs. control
4. Ensure brand consistency throughout
5. Build marketing capability
info@marketing2020.org