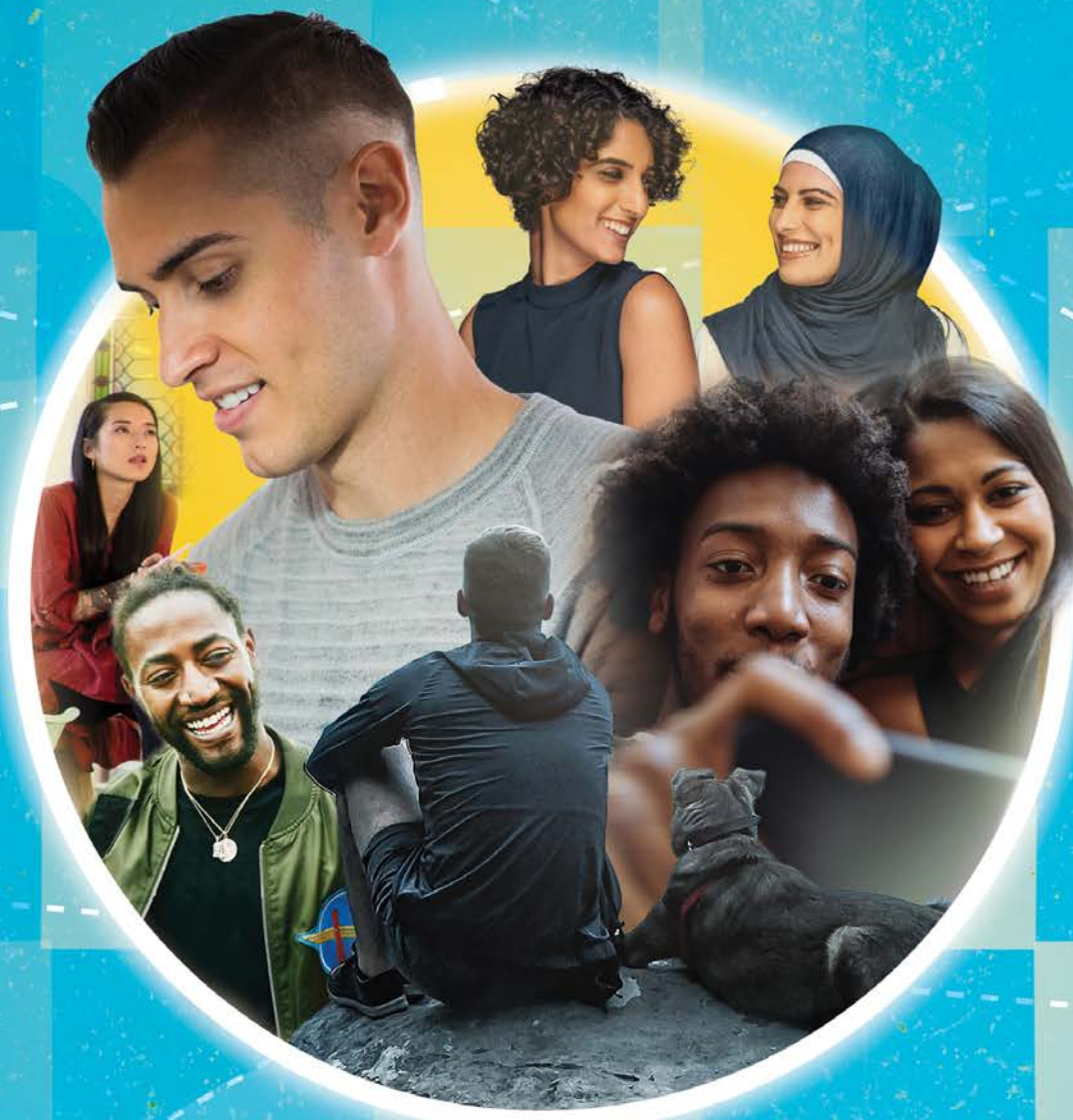


**Deloitte.**  
Insights



# 2020 Global Marketing Trends

Bringing authenticity to our digital age

# About the Deloitte CMO Program

Deloitte's CMO Program supports CMOs as they navigate the complexities of the role, anticipate upcoming market trends, and respond to challenges with agile marketing.

[Read more on the latest marketing trends and insights.](#)

Digital technology has changed the face of business. Across the globe, Deloitte Digital helps clients see what's possible, identify what's valuable, and deliver on it by combining creative and digital capabilities with advertising agency prowess and the technical experience, deep business strategy, and relationships of the world's largest consultancy. Deloitte Digital empowers businesses with the insights, platforms, and behaviors needed to continuously and rapidly evolve to perform beyond expectations. [Read more about Deloitte Digital's world-class digital agency and its service offerings.](#)

# Contents



Introduction | 2



Purpose is everything | 6



Paying down experience debt | 14



Fusion is the new business blend | 22



Are you a trust buster or builder? | 30



The amplification of consumer participation | 38



Valuing your most important asset—talent | 48



Diffusing agility across the organization | 56

# Introduction

## The human connection

Every industrial revolution was catalyzed by a major technological evolution. Today is no different. With 90 percent of the world’s data having been produced in the last two years and more than 26 billion smart devices in circulation, we are living in an era of unprecedented technological innovation—one that has spurred the Fourth Industrial Revolution.<sup>1</sup>

**O**UR FIRST *GLOBAL Marketing Trends* report is, in many ways, a response to this Fourth Industrial Revolution. Yet, it’s not a technology report. For no matter which era we live in or the technology it brings forth, the *human* remains constant throughout this relay of revolutions. This report is intended to guide C-suite leadership in developing their strategies in this fast-changing digital milieu, while keeping the human front and center.

In this spirit, we set out to explore how brands can navigate the increasingly digitized business, economic, and social environment in a way that helps preserve—and even cultivate—their *human connections*. Through interviews with more than 80 subject matter experts across the globe, we identified *seven key trends* on which every business will likely have to focus over the next 18 to 24 months to help build a socially and human-conscious enterprise. To create this report, we integrated new research and analysis, insights from academic literature, and stories from the field. While each of these trends varies in



age—conversations around some are just starting to pick up in the public sphere while others have been noted in literature for centuries—there’s a common thread that runs through them, one that puts the human at the forefront of our digital environments.

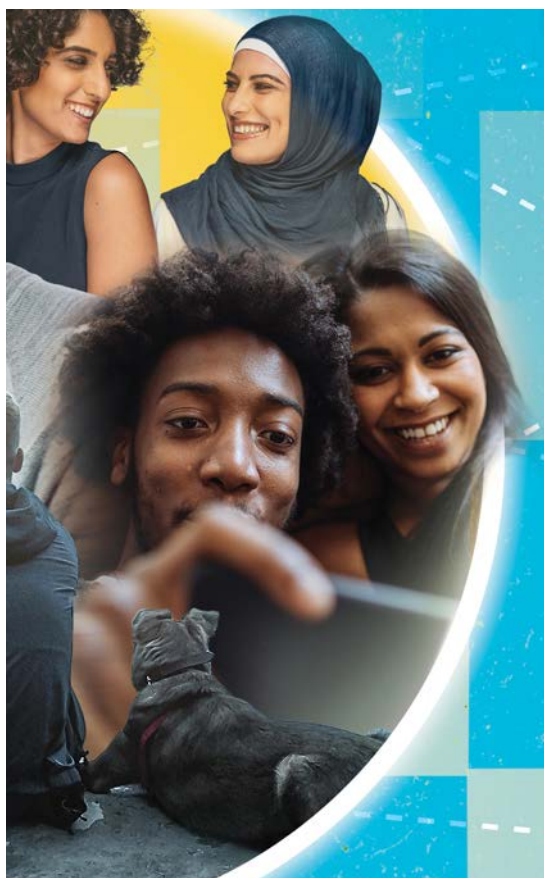
## Seven trends to help brands refocus on the “human”

Just as people expect brands to treat them like humans and not merely as transactions, they also expect brands to *act* more human. This means they expect the brands with which they interact to embody human qualities—be steadfast and transparent in their beliefs, consistent in their actions, and authentic in their intentions.

Our seven marketing trends are anchored in this human-first philosophy. Among these seven, we’ve identified two overarching trends, connecting nearly all facets of business, that help brands place the human at the center of their work. These are

**purpose** and **human experience**. The first trend—*purpose*—and the focus of the first chapter of this report is foundational to why brands exist. Though purpose is not new, it’s

more important now than ever to direct every strategic choice across the organization. Authentic, human-centric purposes are differentiated in the mind of society in a way that’s impossible for others to imitate. The second trend—*human experience*—weaves purpose across a brand’s interactions and relationships with its customers, workforce, and business partners, helping ensure that every facet of a company’s operations is aligned with making the world better for all the people it serves.



## Our hope: Putting the human at the center of our trends exploration can help brands forge their own path to making an impact that matters.

Purpose and human experience unite the five other trends—**fusion**, **trust**, **participation**, **talent**, and **agility**. The third chapter—*fusion*—highlights how *purpose* and *human experience* are together the North Star that guides brands in choosing partners with whom to engage in large, open ecosystems. Our fourth chapter makes it clear that brands can’t accomplish purpose-driven work authentically without establishing *trust* across these ecosystems.

To help brands align with customer values, the fifth chapter provides guidance on how they can bring consumers into the ecosystem and amplify their *participation*. Chapter six discusses how *talent* should be nurtured in a manner that enables brands to best work toward their purpose. In the final chapter, we deconstruct what it takes to structure internal operations in an *agile* manner that empowers brands to not only move at the speed of technology, but also slow down enough to create *moments that matter* for all people they touch.

From the C-suite to the frontline workforce, we close each chapter with specific tips on how marketers can better position their brands and their companies in this digitally connected age.

The breakneck pace of technological change is simultaneously exciting and overwhelming, full of opportunity and the potential for missteps. Our hope: Putting the human at the center of our trends exploration can help brands forge their own path to making an impact that matters.



**Diana O'Brien**  
Global chief marketing officer  
Principal, Deloitte Consulting LLP  
[dobrien@deloitte.com](mailto:dobrien@deloitte.com)



**Andy Main**  
Global head of Deloitte Digital  
Principal, Deloitte Consulting LLP  
[amain@deloitte.com](mailto:amain@deloitte.com)



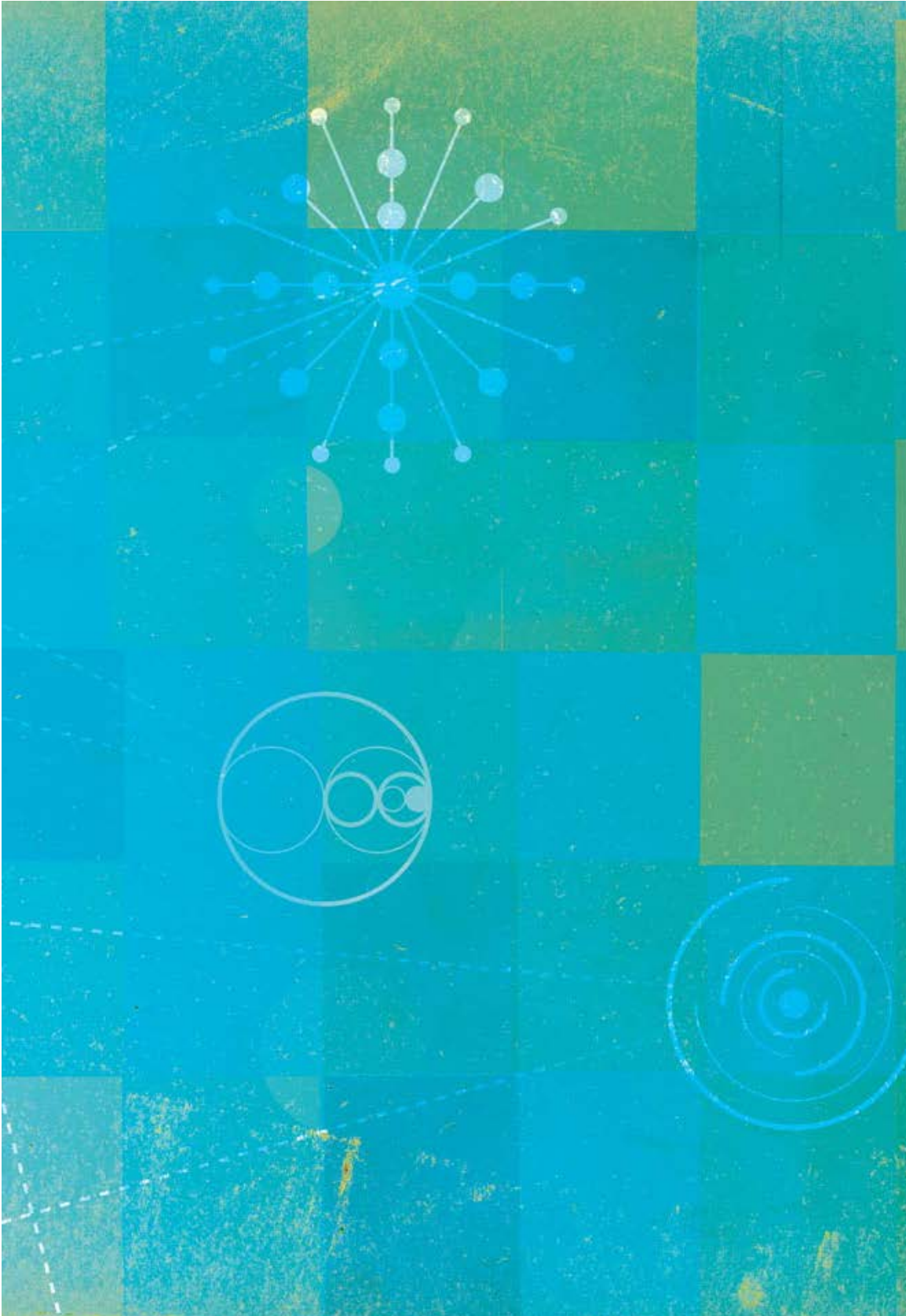
**Suzanne Kounkel**  
US chief marketing officer  
Principal, Deloitte Consulting LLP  
[skounkel@deloitte.com](mailto:skounkel@deloitte.com)



**Anthony R. Stephan**  
US head of Deloitte Digital  
Deloitte Consulting LLP  
[astephan@deloitte.com](mailto:astephan@deloitte.com)

## Endnotes

1. Bernard Marr, "How much data do we create every day? The mind-blowing stats everyone should read," *Forbes*, May 21, 2018; Statista, "Internet of Things (IoT) connected devices installed base worldwide from 2015 to 2025 (in billions)," accessed September 12, 2019.







# Purpose is everything

How brands that authentically lead with purpose are changing the nature of business today

**M**UCH LIKE WHAT a foundation is to a house, a conductor is to an orchestra, and a canvas is to an artist's masterpiece—a clear purpose is everything to an organization. It is an organization's soul and identity, providing both a platform to build upon and a mirror to reflect its existence in the world. It articulates *why an organization exists, what problems it is here to solve, and who it wants to be* to each human it

## Companies that lead with purpose and build around it can achieve continued loyalty, consistency, and relevance in the lives of consumers.

touches through its work. While it's not the first time in history businesses are pondering why they exist and who they are to their customers,<sup>1</sup> the current trend based on our research shows that businesses are using **purpose** to create deeper connections with consumers, do more for the communities with which they work, attract and retain talent, and in the process, are achieving greater results and impact.

Not every organization views purpose as an all-encompassing ideal. Some consider it merely a tool to advertise who they are and what they stand for to capture more market share. Others believe selling quality products at the lowest price point is the only thing that matters to consumers. While we acknowledge instances of successful companies in the market aligned with this thinking, our research shows that what separates purpose-driven

businesses from the rest are longevity and authenticity. Companies that lead with purpose and build around it can achieve continued loyalty, consistency, and relevance in the lives of consumers. Those that fail to identify and articulate

their purpose may survive in the short term, but over time, people are likely to demand more.

Purpose-driven companies witness higher market share gains and grow on average three times faster than their competitors, all the while achieving higher employee and customer satisfaction.<sup>2</sup> Today's consumers often identify with a brand's purpose, seeking to connect at a deeper level even

### UNPACKING PURPOSE

In today's world, purpose is paramount. The more businesses talk about purpose, the more it runs the risk of becoming just another corporate buzzword. But in its truest form, purpose is different from the rest. How? Purpose answers an all-important question, "*Why does a company exist?*"—and the answer can serve as the beacon for all organizational decision-making.

as the brand reciprocally aligns with who they are and who they want to be.

In a recent consumer poll, Deloitte asked respondents to share *what they cared most about while making decisions about brands* (see figure 1).<sup>3</sup>

Our findings revealed that many consumers today make decisions based on how brands treat their people, how they treat the environment, and how they support the communities in which they operate. When companies align their purpose with doing good, they can build deeper connections with their stakeholders and, in turn, amplify the company’s relevance in their stakeholders’ lives. Increasingly, businesses are harnessing the power and opportunity of aligning their purposes with societal good. In Deloitte Global CEO Punit Renjen’s *Success personified* report, leaders ranked societal impact as the number one way they measure annual performance—more than financial performance or customer and employee satisfaction.<sup>4</sup>

In the following section, we discuss and demonstrate the significance of purpose-led

business, offering insights into why some companies choose to drive business from purpose and how others can learn from such purposeful practices to evolve their own thinking.

## Purpose with an impact

Many organizations are successfully driving purpose into their businesses for three main reasons:

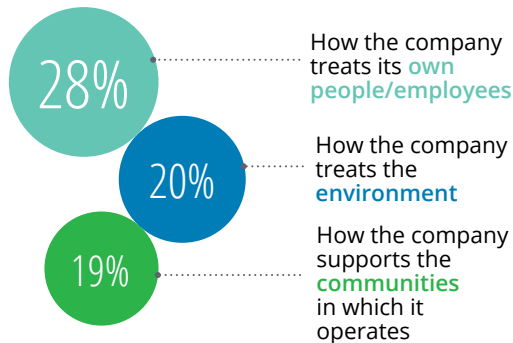
- 1. Purpose is a core differentiator.** Purpose-oriented companies have higher productivity and growth rates, along with a more satisfied workforce who stay longer with them.<sup>5</sup> Our research shows that such companies report 30 percent higher levels of innovation and 40 percent higher levels of workforce retention than their competitors.<sup>6</sup> While traditional trends might dominate purchasing behavior, new opportunities exist to connect with customers through purpose.

In 2019, our consumer survey showed that price and quality remain the biggest factors driving customer decisions.<sup>7</sup> However, many of the same respondents (55 percent) believe businesses today have a greater responsibility to act on issues related to their purpose. Those failing to do so risk being displaced by purpose-driven disruptors. For example, Unilever’s 28 “sustainable living” brands (i.e., brands focused on reducing Unilever’s environmental footprint and increasing social impact) such as Dove, Vaseline, and Lipton delivered 75 percent of the company’s growth and grew 69 percent faster on average than the rest of its businesses in 2018 (compared to 46 percent in 2017).<sup>8</sup> Soap, petroleum jelly, and tea are everyday household essentials, but by promoting sustainable living, these products became differentiated as they embody the company’s purpose.

FIGURE 1

### Top issues consumers identify with while making decisions about brands

Percentage of respondents



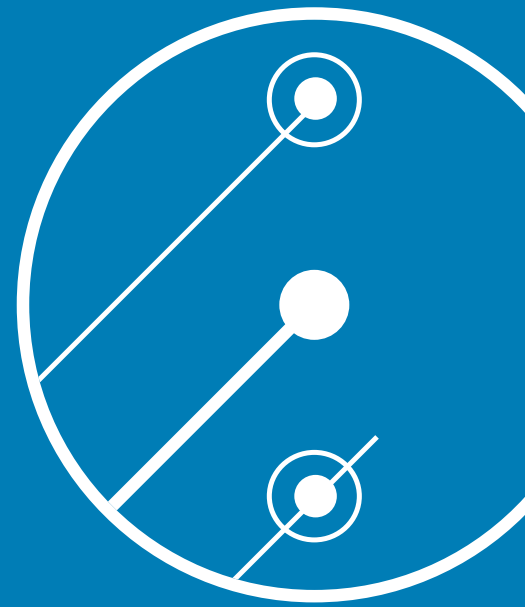
Source: Deloitte 2019 Consumer Pulsing Survey in the United States, United Kingdom, China, and Brazil.

## 2. Purpose means something to all people.

Purpose-driven businesses factor in the experiences of all humans they touch,<sup>9</sup> as people want to work for and support a company whose purpose is focused on the greater good of society.<sup>10</sup> “They are looking to work with companies that share their values, that actively express what they are doing to be a good partner with the world,” explains Carol Cone, founder and CEO of Carol Cone ON PURPOSE, often referred to as the “Purpose Queen.”<sup>11</sup> Organizations that don’t clearly articulate their purpose to their customers, workforce, and partners may run the risk of falling behind or failing entirely.

On the other hand, brands that have an authentic relationship with all their stakeholders can create meaningful connections with them, enabling those stakeholders to identify with and feel ownership of the brand’s purpose.<sup>12</sup> This trend is only set to strengthen as young people around the world are growing up with a deeper sense of purpose than previous generations and are seeking out products that directly support causes about which they care. For example, 53 percent of South African millennials suggest they’ve changed their relationship with a business because of the impact its products or services have on the environment or society.<sup>13</sup> Moreover, younger generations also want to work at companies with an authentic purpose, with more than 70 percent of millennials expecting their employers to focus on societal or mission-driven problems.<sup>14</sup>

- 3. Purpose is who they are.** Purpose-driven businesses truly embed purpose in every action, aiming to leave an enduring impact on people’s lives. Increasingly, customers are looking to engage with companies that help them achieve their goals. Whether it’s Kellogg’s aim to “nourish families so they can flourish and thrive” through nutritious breakfast cereals; Patagonia being “in business to save our home planet”; or Sumo Salad aspiring to “make Australia a healthier and happier place”—orienting business around purpose can help



Our consumer pulsing survey revealed that more than 80 percent of consumers would be willing to pay more if a brand raised its prices to be more environmentally and socially responsible or to pay higher wages to its employees.

companies drive their operations toward outcomes people value, and in turn, deliver what stakeholders value.

## Authenticity is paramount

The origin of purpose and its overlap with corporate social responsibility (CSR) can make customers, workforces, and partners wary of a business's motives. While a company's purpose doesn't have to directly impact society as a whole, *authenticity is paramount*.

Many organizations leading with purpose deploy different strategies to ensure they demonstrate authenticity in everything they do. Here's how you can do the same:

- 1. Tell your story and make it impactful.** Authenticity is rooted in a brand's commitment to creating an impact and sharing its story. Procter & Gamble's (P&G's) push to become "a force for good and a force for growth," for example, is rooted in telling stories about issues close to its purpose and what its customers value. P&G recognizes that more than 5 billion people across the planet use its products, and as a result, its campaigns seek to demonstrate its commitment to equality worldwide. P&G campaigns such as "The Look" and Tide's "Wash Away Labels" address issues such as diversity, equality, and unconscious biases.<sup>15</sup> This can enable P&G to connect at a deeper level with its consumers, regardless of who they are and where they are from.
- 2. Walk the walk.** Authentic purpose-driven businesses "walk the walk" by being transparent and accountable for everything they do. With incredible transparency and data at their fingertips, consumers today seemingly know everything about how a business brings its

products to market. Our consumer pulsing survey revealed that more than 80 percent of consumers would be willing to pay more if a brand raised its prices to be more environmentally and socially responsible or to pay higher wages to its employees. Out of these respondents, 15 percent said that they would be willing to pay over 25 percent more for a brand's items.

Thus, when a brand leads with purpose—authentically—it can achieve a "trusted status" with its customers, workforce, and partners, opening up new connections while increasing

## While a company's purpose doesn't have to directly impact society as a whole, *authenticity is paramount*.

growth and revenue. Take the instance of Max Burgers, a burger joint founded in Sweden in 1968, addressing the issue of climate change. In launching its Climate-Positive Burgers, Max Burgers aimed for greater transparency about its sourcing and the impact of its products on customers and the environment, helping earn trusted brand status in the process.<sup>16</sup>

- 3. Put all humans at the heart of your decisions.** Brands leading with purpose often occupy a meaningful place in the hearts and minds of *all* the people they touch. For example, at Deloitte, our purpose—*making an impact that matters*—serves as the soil from which everything else grows, influencing and fueling life in all parts of our organization, work, and talent. Our purpose guides everything we do—from hiring and learning and development to who we want to be for our customers and the communities in which we work.

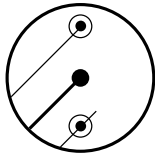
Acknowledging the importance of diversity and inclusion and representing *all humans* in the decision-making process further proves the authenticity of a brand. To support inclusive decision-making, Deloitte encourages their workforce to apply a lens of empathy in everything they do. Supported by human-centered design techniques, Deloitte practitioners are provided the opportunity to participate in training to learn approaches that encourage empathy by placing themselves in the shoes of clients, partners, stakeholders, and colleagues, to guide our collective work. By investing in training and learning, practitioners can better connect with people, and companies can ensure their people are their greatest ambassadors, helping achieve and communicate their purpose.

- 4. Let purpose evolve with the organization and bond its people.** Every business is founded with a core purpose, but purpose can

require nurturing and revisiting too. Stoke your purpose over time, revisit your core DNA, and evolve it inclusively with all your people. Then use the findings to help bond people across siloed parts of the organization, define your strategies for customer engagement, cultivate a diverse culture, and define and refine who you are in the world.

## Achieving meaningful growth

In a world overflowing with options, many brands authentically leading with purpose are discovering new opportunities to deliver value to their customers and the communities in which they operate. By leading with purpose, being authentic in how they tell stories and articulate their impact, focusing on all humans, and imbibing empathy, many of these companies are outpacing their competitors and leaving an impact on everyone they touch.



## CHEAT SHEET LEADING WITH PURPOSE

### FOR THE ENTIRE ORGANIZATION

- ▶ **BE AUTHENTIC:** Allow time for your people to reflect on the role of purpose in their day-to-day work.
- ▶ **CREATE A CALL TO ACTION:** Leverage purpose to rally the workforce around a common goal.
- ▶ **SHOW REAL IMPACT:** Use data and insights to truly demonstrate how you're accomplishing your goals. Move beyond reporting inputs and outputs to showcasing outcomes and telling stories about what you achieve.
- ▶ **LEAD WITH EMPATHY:** Understand what makes people across your organization and customers tick and why they support your brand. Walk in their shoes to inform and understand how your purpose impacts who they are.
- ▶ **SEE CONSUMERS AS MORE THAN CUSTOMERS:** People using and buying your product or service are active stakeholders, investing hard-earned money, time, and attention in your brand. Use data and insights to understand what they value and connect it to your purpose.

### FOR THE CMO

- ▶ **MAKE SURE YOUR PURPOSE IS RELEVANT AND MATTERS TO YOUR CUSTOMER:** You are responsible for representing the customer to the C-suite, so ensure that your purpose aligns with your customers' values; whether it be sustainability, social impact, or product quality, purpose needs to resonate with customers.
- ▶ **BE THE CATALYST FOR LEADING WITH PURPOSE WITHIN THE C-SUITE:** Showcase the importance purpose plays in positioning the brand in the marketplace.
- ▶ **ARTICULATE HOW PURPOSE INFLUENCES CUSTOMER PERCEPTION OF THE BRAND:** View consumers as more than just customers and help others understand they are active stakeholders who invest their money, time, and attention in your brand.
- ▶ **SET AN EXAMPLE FOR OTHER INTERNAL FUNCTIONS TO EXPLAIN THAT PURPOSE IS EVERYONE'S PREROGATIVE:** Help people find meaning in their work and showcase how it connects to the purpose of your brand.

### FOR OTHERS IN THE C-SUITE

- ▶ **CEO:** Talk the talk, walk the walk—identify your purpose, promote it through words and actions, and help build it into the fabric of your organization. Help employees find meaning in their work by communicating how your purpose connects to what they do each day.
- ▶ **CFO:** Identify new metrics for living out the company's purpose; be willing to play the long game and take risks to embed your purpose in financial decision-making.
- ▶ **CIO:** Be authentic and genuine about how data is leveraged for storytelling around the impact your brand creates.
- ▶ **CHRO:** Embed purpose in job descriptions and approaches to hiring. Deploy purpose-driven outcomes in how people are managed and evaluated to ensure authenticity is upheld.

## Endnotes

1. A few sources that discuss the role of business and purpose in society include: Aristotle, *Nicomachean Ethics* (Cambridge: Cambridge University Press, 2000); Michael E. Porter and Mark R. Kramer, "Strategy and society: The link between competitive advantage and corporate social responsibility," *Harvard Business Review*, December 2006; Jim Stengel, *Grow: How Ideals Power Growth and Profit at the World's Greatest Companies*, (Crown Business, 2011).
2. Jim Stengel Co., "Purpose," accessed September 16, 2019.
3. Deloitte consumer pulsing survey conducted in United States, United Kingdom, China, and Brazil in 2019. *Survey methodology*: Through a mobile application survey instrument, Deloitte polled a global audience of 4,000 consumers evenly distributed across the United States, the United Kingdom, Brazil, and China. The sample is equally represented by age and gender.
4. Deloitte Insights, *Success personified in the Fourth Industrial Revolution*, 2019.
5. Jim Stengel Co., "Purpose."
6. Josh Bersin, "Becoming irresistible: A new model for employee engagement," *Deloitte Review* 16, January 27, 2015.
7. Deloitte consumer pulsing survey conducted in United States, United Kingdom, China, and Brazil in 2019.
8. Unilever, "Unilever's purpose-led brands outperform," press release, June 11, 2019.
9. Simon Erskine Locke, "Larry Weber: On corporate purpose & technology," *CommPro.biz*, July 22, 2019.
10. Caterina Bulgarella, "Purpose-driven companies evolve faster than others," *Forbes*, September 21, 2018.
11. Carol Cone (founder and CEO of Carol Cone ON PURPOSE), interview with Deloitte at the Cannes Lions Festival of Creativity 2019, June 17–21, 2019.
12. Carol Cone ON PURPOSE, "Collaborative," accessed September 16, 2019.
13. Deloitte, *The Deloitte global millennial survey 2019*, 2019.
14. Bersin, "Becoming irresistible."
15. Procter & Gamble, "The Look," accessed September 16, 2019; Conill, "Conill and Procter & Gamble win Effie Award," press release, June 2, 2017.
16. Max Burgers, "Climate-positive burgers," accessed September 16, 2019.





# Paying down experience debt

How brands are refocusing their values to elevate the human experience

**A**S YOU'RE LIKELY reading this article on your digital device of choice, you don't need to be reminded of the omnipresence of all things digital in human life today. Instead of going to a bookstore and taking tips from fellow bibliophiles on our next read, we check online reviews and order books digitally.<sup>1</sup> Automated checkouts allow us to circumvent small talk and eye contact with the cashier. We "like" our friends' posts on social media rather than telling them in person that we like *them*. And autonomous vehicles will one day likely let us literally fall asleep at the wheel.

**Despite efforts to replicate human behavior and gestures through automation and AI, the essentials of human connection—eye contact, personal touch, empathy—remain irreplaceable by technology.**

Indeed, digital technologies can make it easier for us to navigate through our busy lives, but they also can erode the fundamental elements of human connection. Despite efforts to replicate human behavior and gestures through automation and AI, the essentials of human connection—eye contact, personal touch, empathy—remain irreplaceable by technology. So, when digital connections—personal and professional—lack a human touch, it can create an environment where people feel isolated,

underrepresented, and unfulfilled. This can result in people opting for quick answers to narrowly defined problem sets versus more sustainable solutions that take into account what it means to be human.

We believe that the rapid pace of digital change is adding to a buildup of these unintended consequences, which we call **experience debt**. Why is this? As many behavioral psychologists will tell you, humans are inclined to trade the hard choice of tomorrow for the easier solution today. This is evident in the trillion-dollar debt of the US government and the United States' collective personal credit card and student loan debt—US\$423.8 billion and US\$1.5 trillion, respectively.<sup>2</sup>

In the realm of technology, easier choices made today by companies can result in a heavy technical debt for them later (think cutting corners on an IT project to meet mounting business pressures or lack of stakeholder understanding of the technical

implications of launching a new ERP system). This innate human tendency to put off hard choices makes us wonder how often businesses are making easier choices about the digital frontier that do not factor in the human.

Consequently, this experience debt can have far-reaching implications for the humans who navigate these digital solutions. Here are some examples: The integrity of our news feeds can be diminished

## QUANTIFYING THE HUMAN EXPERIENCE

Recently, we conducted research to better understand how organizations can authentically—and empathetically—elevate the human experience.<sup>3</sup> After years of viewing the customer experience and the workforce experience as isolated initiatives, many organizations achieved only marginal results. Thus, many began to integrate the two. However, we saw that the most effective results are achieved by aligning and connecting the customer, workforce, and business partner experiences through shared values.

To better identify—and quantify—the shared values of customers, workforces, and partners, we developed the human values compass. Drawing on more than 200,000 behavioral data points, attitudinal statements, and demographics, we found four cardinal human values: personal achievement (me), belonging (we), curiosity (unknown), and control (known). Certainly, the pairs “me and we” and “unknown and known” are inherently at odds. But as figure 1 shows, there are four more values that arise when these cardinal values interact: trying new things, learning new things, sharing with others, and caring for others.

From our work on the human values compass, we found that no matter what your customers, workforce, and partners value, five tenets contribute to elevating the human experience:<sup>4</sup>

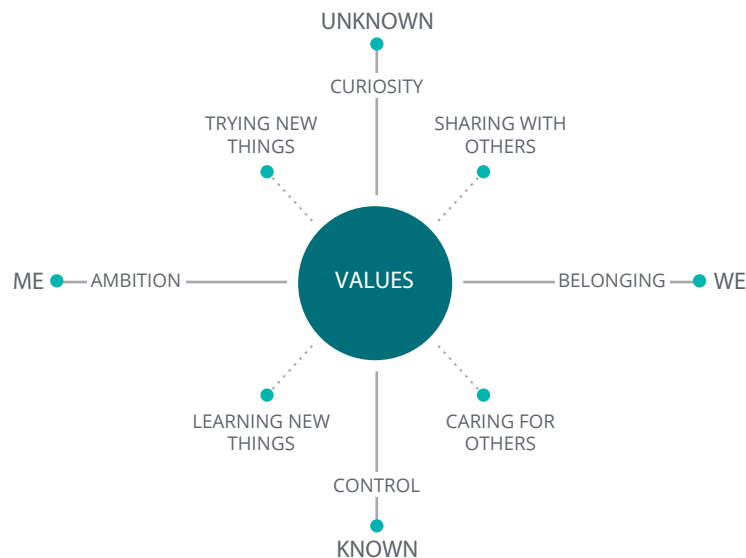
- Being obsessed with all things human.
- Proactively delivering on human needs.
- Executing with humanity.
- Being authentic.
- Working to change the world.

When a business can identify these values and work toward building solutions that align to them, it can elevate the human experience.

Read Deloitte Digital's article, [“We're only human: Exploring and quantifying the human experience,” to learn more.](#)

FIGURE 1

### The human values compass helps identify and quantify the shared values of customers, workforces, and partners



Source: Deloitte analysis.

by outside influencers; studies reveal that while social media can make us more connected, it can also leave us feeling isolated from society and envious of others;<sup>5</sup> facial recognition technology can accelerate processing times at borders and secure mobile devices, but it may be less effective in accurately identifying women and people of color;<sup>6</sup> biased data can unintentionally lead to racially biased prison recidivism algorithms;<sup>7</sup> and when our technologies lack inclusive design, we can end up with products such as retina scanners that don't factor in people in wheelchairs.<sup>8</sup>

So, how do we reduce this experience debt? If “going off the grid” or leaving it to lawmakers doesn't work for you, then we have another, perhaps bolder, option: *Pay down experience debt by elevating the human experience*. For businesses, this means striving to address the unmet human need for connection by aligning customers, the workforce, and partners to a common purpose (see our trend on [purpose](#) to learn more). In this article, we explore how some core tenets discovered in our prior research on human values can help companies elevate the human experience in a manner that emphasizes the *human*.

## Designing with empathy

John Steinbeck, who won the Nobel Prize in Literature in 1962, eloquently wrote, “You can only understand people if you feel them in yourself.” At its core, empathy can equip you with perspective. If you have empathy, you can better design for the human experience because you intimately understand how your stakeholders find meaning and belonging in products and services. Of course, it can be easier to be empathetic if you share the same values with those you're looking to serve—this means being congruent in your values across customers, workforce, and business partners.

In fact, our prior research on human experience found the organizations that align their values best with their stakeholders are also the most successful in terms of workforce and customer satisfaction.<sup>9</sup> Further, over a three-year period, these same organizations are twice as likely to outperform peer groups in revenue growth (see sidebar, “Quantifying the human experience” to learn more).



If you have empathy,  
you can better design  
for the human  
experience because you  
intimately understand  
how your stakeholders  
find meaning and  
belonging in products  
and services.

## Delivering on human experience

During our research, we came across three powerful examples of companies that used a set of shared values to build more connected and inclusive human experiences. Businesses can draw inspiration from them to work toward delivering an elevated human experience.

- **Leadership at General Motors (GM) to change the world through “Zero, Zero, Zero.”**<sup>10</sup> Acknowledging the power of its platform and driven by an organizational desire to influence and shape the outcomes of all the people it touches, GM declared “zero crashes,

zero emissions, and zero congestion” as the company’s purpose and mission for a better world. In

an era of deregulation in the United States, this statement demonstrates GM’s commitment to building a more sustainable world, placing change at the center of its vision, values, and future business.

- **Walgreens launches the “Feel More Like You” program.**<sup>11</sup> Walgreens has long employed beauty consultants to help people find the right products for any occasion. But what about those going through one of the most trying times of their life—cancer patients? Recognizing the physical and emotional toll cancer survivors go through and its impact on self-image, Walgreens created a more human

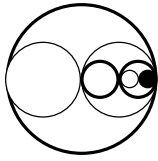
experience through its Feel More Like You program. By partnering with Look Good, Feel Better (a cancer support program specializing in patient beauty needs) and the Cancer Support Community, Walgreens trained its beauty consultants and pharmacists to help patients hold on to (or reclaim) their sense of self. Services under the program include advice on hair loss, skin and nail problems, and fatigue, to name a few.

- **REI’s #OptOutside for Black Friday.** While many use the Thanksgiving holiday to rush to the store or shop online for the best holiday deals, outdoor retail cooperative REI knows that its workforce and customers value connecting with others through a shared love of the outdoors. To lessen the holiday stress and adhere to its core values, REI closes all 200 of its stores on Thanksgiving and Black Friday to encourage its workforce and customers to spend time outside with their loved ones (all 12,000 employees receive paid time off).<sup>12</sup>

## Connected technology is likely here to stay—for good or for bad.

## Connecting to the human spirit

Despite our innate desire for greater and deeper connections, the pace of digital change can make it very easy for us to disengage and disconnect from what makes us human. However, connected technology is likely here to stay—for good or for bad. Now it’s upon us—individually and at the organization level—to help ensure technology connects with the human spirit and elevates the human experience rather than dampen the spirit and break down human connections.



## CHEAT SHEET

## ELEVATING THE HUMAN EXPERIENCE

### FOR THE ENTIRE ORGANIZATION

- ▶ Recognize that the human experience goes well beyond the four walls of the organization. It includes customers, workforce, and business partners.

### FOR THE CMO

- ▶ Get to know the values of the humans you hope to serve.
- ▶ As leader of the brand's voice in the marketplace, relentlessly message the values the brand holds sacred.
- ▶ While designing customer-facing solutions, be wary of "easy" solutions that could add to long-term experience debt.
- ▶ Evaluate your solutions from an empathetic lens in order to bolster human connection for the customer, the workforce, and business partners.
- ▶ Orchestrate cross-functional teams to uncover unmet human needs and create solutions through experimentation.

### FOR OTHERS IN THE C-SUITE

- ▶ **CEO:** Evangelize the values of the organization across the ecosystem and help ensure they are adhered to.
- ▶ **CFO:** Secure investments in data that facilitate identifying unmet human needs. Also, work toward partnerships that align with company values.
- ▶ **CIO:** Enable data collection and analysis that better create the human experience. Advocate human-first technology initiatives that build rather than erode human connections.
- ▶ **CHRO:** Align the workforce to company values so they understand the importance of their work and how it solves meaningful problems in the world.

## Endnotes

1. David Byrne, "Eliminating the human," *MIT Technology Review*, August 15, 2017.
2. Credit card debt information was captured by Claire Tsosie and Erin El Issa, "2018 American household credit card debt study," Nerdwallet, December 10, 2018. Student loan statistics were gathered from Zack Friedman, "Student loan debt statistics In 2019: A \$1.5 trillion crisis," *Forbes*, February 25, 2019.
3. Amelia Dunlop et al., "We're only human: Exploring and quantifying the human experience," Deloitte Digital, August 7, 2019.
4. Ibid.
5. Byrne, "Eliminating the human."
6. Joy Buolamwini and Timnit Gebru, "Gender shades: Intersectional accuracy disparities in commercial gender classification," *Proceedings of Machine Learning Research* 81 (2018): pp. 1-15.
7. Stephanie Wykstra, "Can racial bias ever be removed from criminal justice algorithms?," *Pacific Standard*, July 12, 2018.
8. Memoori, "Current smart city planning is increasing the divides in urban population," August 29, 2018.
9. Dunlop et al., "We're only human."
10. General Motors, "For crashes, emissions and congestion, zero is more," accessed September 15, 2019.
11. Walgreens Newsroom, "Walgreens launches 'Feel More Like You' program to assist people living with cancer manage the physical changes associated with treatment," November 19, 2018.
12. Jerry Stritzke, "REI: Closing on Black Friday for good," REI co.op, November 20, 2018.







# Fusion is the new business blend

How the convergence of ecosystems sparks new business models and greater collaboration

WITH ECOSYSTEMS BECOMING the norm across industries, it has never been easier for companies to enter areas outside their domains. There are likely a couple of reasons for this: First, the rise of cloud data and connected technologies has led to a large number of interactive platforms which have brought once-isolated industries together to solve customer needs holistically. Second, our collective ability to access external resources through the gig economy has made new categories of cross-industry talent accessible to companies. To put it simply, traditional boundaries between industries are disappearing, signaling a great **fusion** of once disparate industries (see sidebar, “Fusion 101” for more information). Consequently, brands are transcending from being isolated entities to becoming members of far-reaching ecosystems.

Many companies, even those that are leaders in their industry, are being compelled by this wave of fusion to find new ways of establishing themselves in these much broader ecosystems—or risk being disrupted by new competition. Many leading brands are now asking themselves: “What business are we in and how do we move outside the conventional construct and redefine who we are?”

While fusion may be new territory for some, the idea that businesses should expand their scope to find growth opportunities and fend off competition has existed for decades. As far back as 1960, Harvard Business School professor Theodore Levitt cautioned businesses on the dangers of narrow thinking.<sup>1</sup> In his seminal article, “Marketing

myopia,” Levitt takes the reader through a litany of examples in which companies were hurt by focusing primarily on product superiority. For instance, the railroad industry was overtaken by automobiles and planes because it didn’t acknowledge it was in the transportation business; the film industry didn’t know it was actually in the entertainment business and, therefore, was quickly outpaced by television; and corner grocery chains didn’t see the value of one-stop supermarkets—even if the customer had to travel a little further. In each case, company executives missed the point: They were focusing too narrowly on what they *did*, and not on what the customers they were serving *needed*.

## FUSION 101

Fusion denotes the erasure of boundaries between traditionally distinct industries, enabled by companies’ newfound abilities to access technology and talent that spreads across boundaries. It requires businesses to move beyond industry silos and recognize they are operating within broad ecosystems, requiring a rethinking of capabilities, brand, partnerships, and its entire existence. Businesses embracing this convergence, or fusion, are capitalizing on symbiotic relationships by reconsidering:

- Scope of customer insights beyond their industry of origin
- Cross-industry competitors and partners relevant to their business
- Participation beyond traditional industries in ecosystems

## FUSION AT WORK

Companies are putting fusion to work in innovative ways—from embedding it in their business models to partnering with cross-industry peers in their ecosystems to deliver value to stakeholders. Here are two examples that illustrate the power of fusion:

- **Evolving spaces.** On the surface, coworking spaces historically provide inexpensive, shared office space for giggers, startups, and anyone looking to find accessible working space. But a closer look shows coworking spaces are evolving by providing the same collaborative, interactive space in new settings. For instance, Life Time Fitness opened coworking spaces at four of its US-based gyms to allow patrons to work and have easy access to exercise in order to “promote a healthy and flexible workstyle.”<sup>2</sup> Similarly, hotels such as Hobo in Stockholm and TRYP by Wyndham in Dubai now offer full-fledged coworking options. With over 200 guest rooms, Hobo offers all the usual amenities of a hotel, while presenting itself as “a meeting point, a workplace, an office, or just a nice place to hang out” for the Stockholm community.<sup>3</sup> TRYP by Wyndham Dubai has a coworking space called “NEST”—one of the world’s first fully functional and integrated coworking spaces within a major international hotel.<sup>4</sup> NEST, which offers services to both hotel guests and nonguests, has evolved into a hive of activity; it offers traditional coworking offerings in an eclectic space, business services, and networking engagements combined with dining, pool and gym access, and free valet parking.<sup>5</sup>
- **An ecosystem for better air quality.** Smart city initiatives across the world are at the forefront of fusion. Consider AIR Louisville.<sup>6</sup> Louisville, Kentucky’s largest city, previously had one of the highest instances of breathing disorders. By enlisting partners to solve the common unmet need for improved air quality, Louisville’s smart city planners brought together once-separate sectors—health care providers, private technology companies, local government, and citizens—to improve citywide air quality with the help of “smart” inhalers. By aggregating and sharing inhaler usage data, the planners were able to help citizens and medical providers uncover troubling patterns of breathing. Concurrently, city officials redesigned high-risk neighborhoods with more trees and/or altered truck routes to reduce emissions. The initiative led to an 82 percent decrease in inhaler usage throughout the city.

In the 60 years since Levitt’s article was published, fusion has only amplified in impact. Earlier, businesses risked being disrupted because they were too focused on the product rather than the customer. Now, as technology rapidly erodes traditional barriers to entry, companies that do not fully comprehend the value of participating in ecosystems will likely remain more susceptible to disruption by those other than their usual industry competitors.

Indeed, there is a monumental shift underway in how businesses operate—and, in many cases, how they perceive themselves. Many of the businesses that succeed in this climate are taking an unconstrained view of how they serve customers and are rightly breaking out of their traditional industry silos. This typically includes engaging with new partners in the ecosystem, sharing data with many of these partners, and working with different types of talent who often operate outside the four walls of the organization. Promisingly,

businesses that ambitiously solve unmet needs through fusion with smart, open ecosystems can systematically displace competitors who are unwilling (or unaware) to do the same.

We are seeing the effects of fusion across multiple ecosystems. Messaging platforms such as WeChat are becoming mobile payment and ridesharing platforms; department stores are opening their doors to e-commerce giants and fitness centers to provide more cross-industry wellness services; and automotive companies are turning into ridesharing and micromobility providers. In each case, they're looking beyond industry boundaries to address customer needs, identify growth opportunities and areas for collaboration, and create new value for customers. Fusion is making brands relevant outside of their industries of origin.

## Marketing in the fusion era

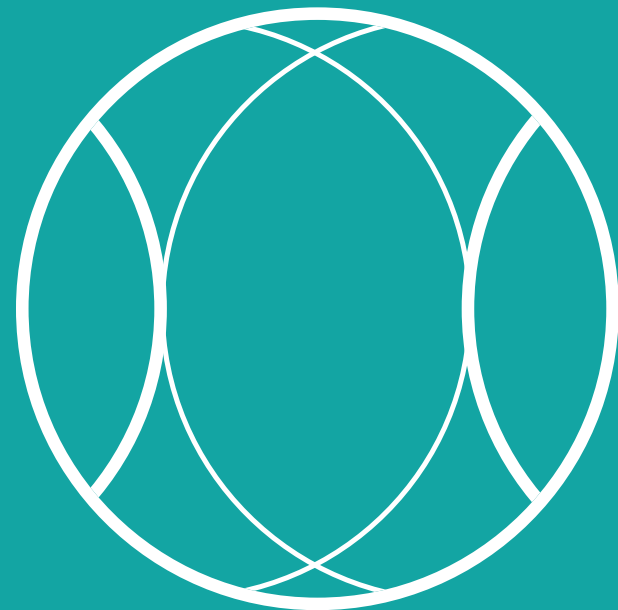
At face value, operating in times of fusion may seem like a daunting task. After all, how does one take an unconstrained view on serving people?

The complexity of the task doesn't mean organizations are unequipped to navigate the fusion wave. It's simply about leveraging your current assets to expand the scope of who you are serving and why. Specifically, businesses can use their existing assets to identify opportunities where partnerships can create new experiences within relevant ecosystems or continue providing existing experiences but at greater convenience.

This can start with understanding the areas in which your company has capabilities to serve unmet needs, along with the opportunity to partner with others across the ecosystem to holistically serve them. Here's how marketers can function effectively in the fusion era by redirecting the valuable assets they most likely already have:

1. **Treat data as the new “dowry.”** One way to attract others to participate in an ecosystem is

Many of the businesses that succeed in this climate are taking an unconstrained view of how they serve customers and are rightly breaking out of their traditional industry silos.



through data. In many cases, this means matching information with new capabilities. For instance, a grocery chain may have accumulated years of purchase data on consumer food spending. In this case, they could potentially partner with health insurance companies to provide lower rates to those who hit certain thresholds for purchasing healthier food.<sup>7</sup>

## By repositioning core company assets to better navigate the fusion wave, marketers can thus develop solutions with a longer-term, more effective view of addressing human needs—with some help from carefully chosen partners.



- 2. Expand your scope through human-centered insights.** Nearly every company today has access to data science capabilities. Rather than deploying these capabilities to solely understand opportunities for customer retention and price optimization, companies can direct these capabilities to uncover where human needs are unmet. This can involve using insights to empathize with people and serve them more deeply and richly to further their end goals.

For example, Kinship, a division of Mars Petcare, wanted to curate new approaches to better address the needs of its customers. To this end, the company launched its Pet Insight Project. Leonid Sudakov, president of Kinship, explained, “We started with this idea of being able to get to understand pets and pet parents in the best possible way, to be able to offer solutions that are really fitting to what their

needs are and create the type of solutions that today might not even exist.”<sup>8</sup> As part of the Pet Insight Project, Kinship partnered with Whistle to provide pet parents with a Whistle FIT (think Fitbit for pets) to constantly monitor their dog, tracking behaviors such as scratching, eating, and drinking. Data from the Whistle FIT is synced with the

dog’s health records during checkups and veterinarian visits with the aim of predicting and preventing potential health conditions.<sup>9</sup> Kinship’s goals with partners are to create relationships that allow the company to better serve and understand pets.

Companies are applying human-centered insights to identify gaps in the holiday shopping season as well. Holiday purchasing is not just about online buys or walking through the mall; it’s often a full-day, time-consuming event that includes navigating traffic, finding parking, and trying to beat the holiday rush. Last holiday season, recognizing the unmet need to mitigate traffic and parking hassles during holiday shopping, Old Navy and Lyft teamed up for two days to offer free rides to customers who opted for in-store pickups after making online purchases.<sup>10</sup>

### 3. Brand permission goes beyond

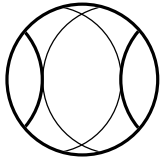
**traditional boundaries.** Marketers are always looking for access to new segments and areas where they can leverage their existing influence. To this end, they should broaden their scope by untethering their brands from traditional sectors, rebuilding them in a way that shows they stand for something across industries, and redefining who they are without conventional constructs. For instance, Virgin Group, whose purpose is “Changing business for good,”<sup>11</sup> parlayed its brand from music to air travel to space travel. Building your brand in this manner creates an asset that can facilitate your entry into new ecosystems while making the brand desirable for new partnerships.

By repositioning core company assets to better navigate the fusion wave, marketers can thus develop solutions with a longer-term, more

effective view of addressing human needs—with some help from carefully chosen partners.

## What business are you in?

Levitt’s “Marketing myopia” aptly demonstrated the importance of expanding a brand’s perspective beyond what it does today. In the era of fusion, this can mean looking beyond industry boundaries and finding new ways to serve customer needs, uncover disruptive threats, and partner with those who may have once been viewed as the competition. It’s all about asking yourself, “What business are we in?” The answer will guide businesses in navigating the world of fusion, enabling them to define themselves to all stakeholders, and building new and necessary capabilities to extend their work across broader ecosystems.



## CHEAT SHEET RIDING THE FUSION WAVE

### FOR THE ENTIRE ORGANIZATION

- ▶ Expand the purview of the customer. Your brand is as important to potential partners as it is to customers.
- ▶ Recognize that your organization is competing in ecosystems, not industries.

### FOR THE CMO

- ▶ Act as the customers' champion to evangelize a new vision of how the organization needs to transform to elegantly serve today's customer.
- ▶ Build sensing capabilities to better unpack and uncover trends in real time to see how systems are transforming and are connected. Follow conversations instead of headlines.
- ▶ Invest time in understanding customer behavior and patterns wherever they lead, even outside usual business areas.
- ▶ Look beyond traditional industry constraints to expand your influence and brand permission. Orchestrate cross-functional teams to uncover unmet human needs and create solutions through experimentation.

### FOR OTHERS IN THE C-SUITE

- ▶ **CEO:** Resist a myopic view of your business. This means trying to uncover unmet needs across industries, paying heed to disruptive threats (even if they don't appear in your traditional industry), and parlaying your influence into new cross-industry partnerships.
- ▶ **CFO:** Explore alternative revenue streams that push the guardrails of standard business. Assess the value of migration risks to opportunities across porous industry boundaries.
- ▶ **CIO:** Support innovation with systems that enable an organization to explore and experiment with serving customers in new ways. Data should expand to identify adjacencies and new strategies for partnering across industries.
- ▶ **CHRO:** Be the people expert as it relates to social, political, and business trends to participate in wider conversations about the future jobs, competencies, and partnerships needed in a human-centered ecosystem.

## Endnotes

1. Theodore Levitt, "Marketing myopia," *Harvard Business Review*, 1960.
2. Life Time Work, "Home," accessed September 17, 2019.
3. Hobo Hotel, "About," accessed September 17, 2019.
4. TRYP by Wyndham Dubai, "NEST," accessed September 17, 2019.
5. Ibid.
6. Tiffany Dovey Fishman and Michael Flynn, *Using public-private partnerships to advance smart cities*, Deloitte, 2018.
7. Seth Nagle, "Enhancing your B2B grocery partnerships through data," RW3, June 5, 2017.
8. Leonid Sudakov (president of Kinship), interview with Deloitte at the Cannes Lions Festival of Creativity 2019, June 17–21, 2019.
9. Pet Insight, "Home", accessed September 17, 2019.
10. Old Navy and Lyft, "Old Navy and Lyft team up to make last-minute holiday shopping easier than ever," press release, December 11, 2018.
11. Virgin Group, "Our purpose," accessed September 17, 2019.





# Are you a trust buster or builder?

How to systematically—and proactively—safeguard trust in business in the connected age

**A**T THE TURN of the 20th century, meat-packing companies developed the first industrial assembly line. Lauded for its unmatched efficiency, the move was quickly duplicated by the emerging automotive industry. Then Upton Sinclair’s alarming novel, *The Jungle*, was published in 1906.<sup>1</sup> Based on six months of research, the book told in uncompromising detail the horrors of the meat-packing industry—people working under extreme duress, unsanitary conditions, and covering up and packaging of spoiled meat. The world was left appalled, regulations swiftly followed, and public trust in the industry disintegrated.

Over the next 100 years, the public elevated **trust** as a primary determinant of how they assess brands. Today, brand trust is more important than

ever for businesses—and it’s all encompassing. Customers, regulators, and the media expect brands to be open, honest, and consistent across all aspects of their business—from products and promotions to workforce culture and partner relationships. And in the era of connected technology and big data analytics, companies must wrestle with another level of complexity: Building a structure that systematically builds trust by protecting customer data from both external cyber threats *and* unethical internal data misuse (see sidebar, “The future of trust” for more information).

The digital era makes trust a complex issue, fraught with myriad existential threats to the enterprise. Organizations can spend millions to safeguard their information, but one person’s susceptibility to a phishing scheme can undermine the entire

## THE FUTURE OF TRUST

Digital transformation has changed how organizations should account for the issue of trust. Organizational trust is a bilateral relationship between businesses and their customers, workforce, partners, and governments. This means companies should build an infrastructure that protects what stakeholders value most, while proactively detecting threats in the domains of cybersecurity, data protection, regulatory compliance, and reputation. Companies that don’t systematically safeguard these domains likely face existential threats that have a bearing on:

- The market value of the brand
- Potential decline in customer loyalty
- The possibility of a public relations fiasco due to the unethical deployment of artificial intelligence (AI) and data usage
- The ability to meet customer needs

## Companies must wrestle with another level of complexity: Building a structure that systematically builds trust by protecting customer data from both external cyber threats *and* unethical internal data misuse.

effort. Alternately, the information may be safe from an outside actor, but a product team may choose to exploit customer data in a manner that spawns public backlash. And even when designers have the best of intentions at heart, their algorithms can produce unintended biases. For these reasons, and many others, organizations should proactively ensure that their processes, technology, and people are working in concert to maintain the high level of trust expected by their many stakeholders.

For this trend, we focus on two domains of trust that marketers often interact with most: customer data and AI. As customer experience champions, marketers are expected to act as trusted stewards of customer information. This refers to accessing and using customer data in a manner that maintains—and builds—trust with the customer. Similarly, as the marketing function continues to leverage AI to enhance customer experiences, marketers should ensure they are executing this in a manner that doesn't threaten the trust of the entire organization.

### Big data needs “big trust”

Just like the early assembly lines, customer data and AI can be powerful differentiators, and that's apparent in their revenue growth. As of 2018, mobile and cloud data traffic—along with the analytical tools designed to extract value from these sources—was valued globally at US\$169 billion and is estimated to reach US\$274 billion by

2022, nearly equal to Finland's annual GDP.<sup>2</sup> We see the use of these emerging technologies manifesting in our daily lives as well. Social media sites grant “free” usage of services in exchange for allowing advertisers access to users' personal social media information and activity.

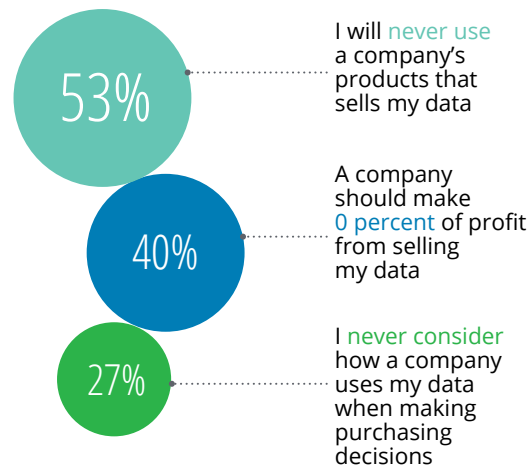
Grocery stores hand out customer discount cards to capture and leverage purchase history, often in partnership with outside vendors, and online retailers use, and sometimes sell, data to build more predictive recommendation engines.

In terms of maintaining and building customer trust, the paths organizations pursue through their data and AI strategies can be fraught with potential missteps. In our research, we polled 4,000 global consumers to better understand customer sentiment toward corporate data usage. Figure 1 shows that for a large number of people, trust

FIGURE 1

### How profiting from the direct sale of data impacts customer trust

Percentage of respondents



Source: Deloitte 2019 Consumer Pulsing Survey in the United States, United Kingdom, China, and Brazil.

## TURN DATA INTO CURRENCY

Customer data usage doesn't need to be a one-sided affair that benefits only the business. Instead, it can be viewed and messaged as a mutually beneficial partnership.

Third-party companies are working to put the decision-making power directly into consumers' hands. This means that people can "opt in" to selling their data in exchange for compensation. Some companies act as liaisons that provide customers with an offer to sell their data usage rights in exchange for cash while others even offer cryptocurrencies as payment. Such moves empower people to choose what data they are willing to share and to whom they sell it for a known price. Though these ideas are more "on the edge," companies can pilot these methods to see what incentives resonate most with their customer base.

By formally and directly enlisting consumers to participate in the data usage/selling process, companies transparently reveal their intentions, taking the customer along on the data journey with their eyes wide open.

quickly erodes if they believe that organizations are directly profiting from their data. For instance, 53 percent said they would never use a company's products if their data is sold for profit and 40 percent believe exactly 0 percent of an organization's profits should be derived from selling data. However, 27 percent of respondents acknowledged that they *never* consider how a company uses their data while making purchase decisions (conversely, only 19 percent *always* consider company data usage).

Taken together, these are important insights that marketers charged with leading the customer message should want to note: In addition to a strong aversion to companies profiting from the sale of consumer data, a substantial part of the respondents are largely unaware of how pervasive the practice already is today. In short, many may feel surprisingly vulnerable to how companies have deployed their personal information.

This may seem foreboding for companies trading in data but leveraging customer data also creates numerous benefits for consumers and business alike. In one study, for instance, 86 percent of customers indicated they would be more likely to

trust companies with their information if they explained how it provides for a better customer experience.<sup>3</sup> For this reason, it's increasingly important for brands to get their customer messaging right on how their data and AI strategies provide a fair exchange of value for customer data.

## Align data policies to purpose

Currently, companies have a high degree of latitude in how they use consumer data. While certainly not recommended, in countries with relatively relaxed privacy regulations, companies can couch permission to sell and use consumer data in dense legal agreements. Or perhaps the agreement could be clear and explicit, but consumers have no choice but to agree if they wish to use a service. Both options expose companies to the real and precedented possibility of a public backlash. Alternately, brands may be putting themselves at greater risk of disruption from a company with a strong purpose tied to data privacy (see our trend on [purpose](#) to learn more on how powerful purposes are creating competitive advantages for companies).

Companies are likely to continually and increasingly feel the pressure to demonstrate how they are acting as good stewards of data on behalf of their customers.



In this context, companies should choose their data usages in a thoughtful manner that builds, rather than erodes public trust. A natural first step can be to ensure the data capture and usage align with the core company mission. For instance, JD Wetherspoon, a pub company servicing the United Kingdom and Ireland, recently deleted over 656,000 customer email addresses since it perceived the emails as an intrusive approach to customer interaction that provides little value.<sup>4</sup> While this case might seem like an exception, it highlights the importance of not only aligning data collection and usage to company purpose, but also supporting the brand's relationship with the customer by extension. As countries and regions implement data protection and privacy regulations such as the General Data Protection Regulation (GDPR) in Europe, brands have a chance to get ahead of the bureaucracy by reviewing their own consumer data processes.

Data policies become even more complicated given brands often acquire data from second- and third-party vendors. In these cases, it can be difficult to fully understand how data was acquired and to what the end customer *knows* they agreed. Nonetheless, it's important for brands to consider what the end user would want and expect from those possessing their data. Fortunately, solutions are coming to market to make this process more transparent and manageable. For instance, one company is piloting blockchain technology for brands to easily track explicit permissions granted by consumers (see sidebar, "Turn data into currency" for other examples).<sup>5</sup> Further, many advertisers are turning toward in-house services to ensure their data is managed and deployed in a manner that is congruent with the company mission.<sup>6</sup>

## Building toward trusted AI

With data as the foundation, brands are leveraging AI to identify and segment audiences, optimize performance, and create better experiences for the customer. But with the complexities involved, two main concerns are being raised around AI trustworthiness:

- **Bias and discrimination:** Human bias can lead to flawed methodology assumptions, biased data for training models, or incorrect interpretations of outputs. This can result in discriminatory advertising, even if not specifically driven by protected categories.
- **Transparency and explainability:** AI development involves complex modeling that progressively improves itself without human intervention. As a result, it can be difficult to transparently describe the inner workings of how these AI black boxes were trained, which, in turn, can make it difficult to easily explain the AI methodology to garner appropriate consumer consent.

Regulations such as the GDPR incorporate clauses involving the use of AI<sup>7</sup>—such as the need to explain to consumers the logic behind automated decision-making. To help organizations maintain a high level of trust around their AI strategies, we recommend the following measures:

**Partner in developing your AI strategy.** As AI trust issues escalate, new institutions are being formed to help promote ethically charged practices and to assist businesses with following these best practices. For instance, the Algorithmic Justice League partnered with the Center on Privacy and Technology to launch the “Safe Face Pledge.” Organizations can use this platform to publicly commit to not abusing facial analysis technology.<sup>8</sup> Further, the league offers to assess code to minimize the opportunity for bias while also providing instruction on inclusive algorithmic design.

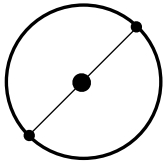
**Design for relevance, not personalization.** Companies readily offer customers special incentives such as free products, discounts, or

personalized and relevant services. Though many of these offerings are meant to be relevant, they can feel invasive (e.g., algorithms that detect if a woman is pregnant based on her web traffic data or purchase history). Instead, organizations can pivot their algorithms to provide relevant recommendations based on circumstance (e.g., offer an umbrella on a rainy day rather than an umbrella after someone buys a raincoat). By focusing on *relevance*, rather than *personalization*, AI recommendations are likely to seem more helpful than invasive.

**Catalyze customer innovation.** Companies can demonstrate how AI leads to better innovation, and therefore, better experiences for the customer. For instance, Amazon gleans insights from its purchase data to better build its supplier network to match consumer demand.<sup>9</sup> Also, importantly, this data is used at an aggregate rather than an individual level. In effect, it provides customers with a better network to assist them in receiving their ordered goods at an even faster pace.

## Trust is the message, transparency the messenger

Company trust, or the lack thereof, continues to make headlines. As data and AI continue to extrapolate, so can their impact on brand trust. Companies are likely to continually and increasingly feel the pressure to demonstrate how they are acting as good stewards of data on behalf of their customers. In this light, they could do well to build a high level of *trust* with their stakeholders by *proactively* and *transparently* demonstrating good behavior.



## CHEAT SHEET BUILDING TRUST IN YOUR BRAND

### FOR THE ENTIRE ORGANIZATION

- ▶ Understand that data belongs to customers and brands are the steward of this customer asset.
  - ▶ Limit data usage and AI to core missions.
  - ▶ Be transparent and upfront in your intentions.
- 

### FOR THE CMO

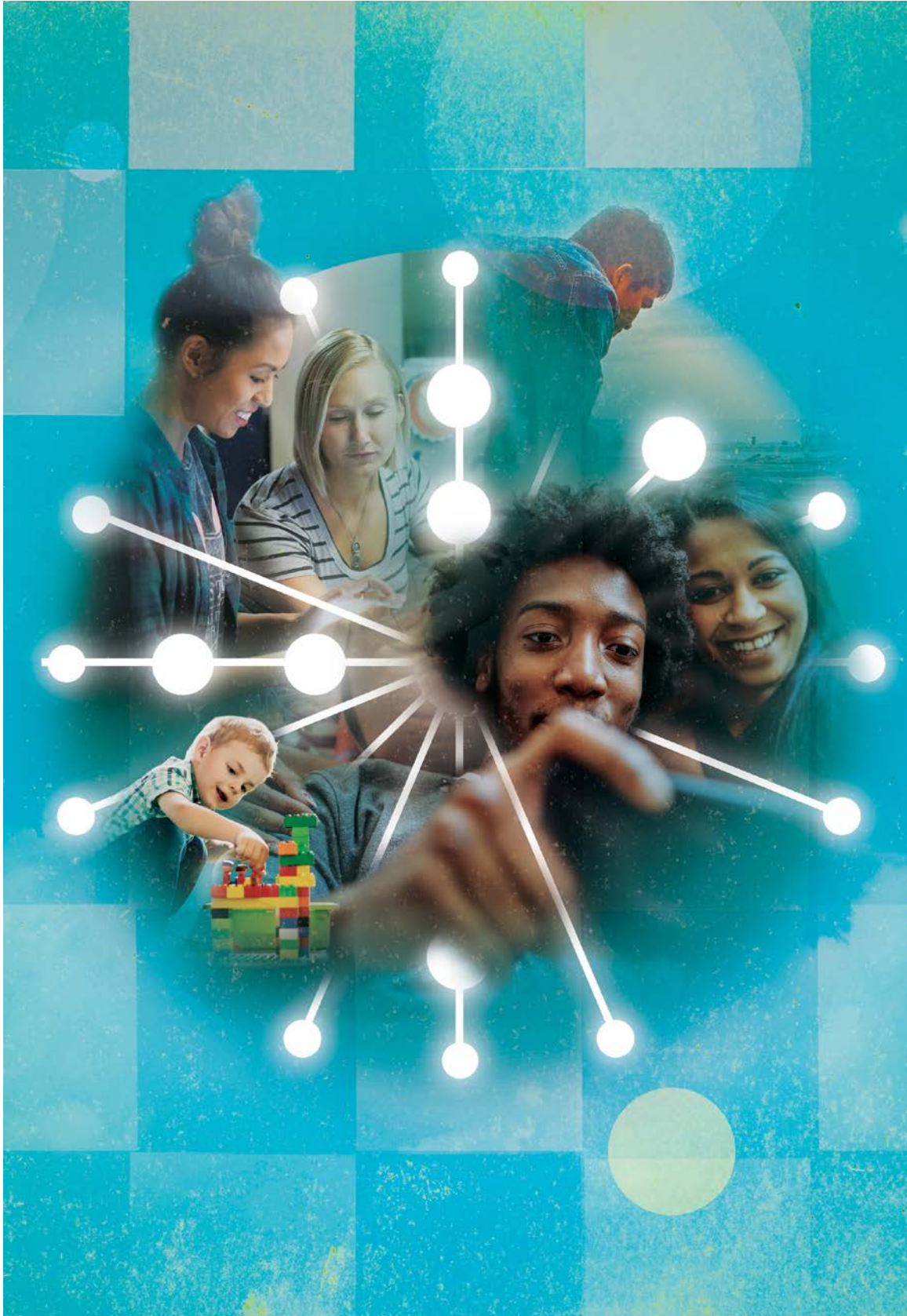
- ▶ Drive the data and AI trust agenda as a strategic imperative, including promoting the brand and its values.
- ▶ Develop a coherent customer journey that includes unified customer data and AI hierarchies.
- ▶ Represent customer wants in terms of data privacy and/or compensation.
- ▶ Lead the messaging to ensure the approach is proactive and clear.
- ▶ Work with legal representatives to avoid regulatory missteps in other markets and regions.

### FOR OTHERS IN THE C-SUITE

- ▶ **CEO:** Ensure the data and AI strategy of your organization is consistent with its purpose.
- ▶ **CFO:** Analyze the financial implications of potential scenarios related to selling customer data, deploying this data through AI, and the negative fallout from its perceived unethical usage.
- ▶ **CIO:** Design systems and digital customer interactions to support ethical use of customer data. Further, prohibit data capture or limit access to data that does not align to core strategies and missions.
- ▶ **CHRO:** Implement workforce trainings and protocols for customer interactions that build trust.

## Endnotes

1. Upton Sinclair, *The Jungle* (California: CreateSpace, 2019).
2. Statista, "Revenue from big data and business analytics worldwide from 2015 to 2022 (in billion U.S. dollars)," accessed June 26, 2019; StatisticsTimes, "Projected GDP ranking (2019–2023)," April 2, 2018.
3. Salesforce, *State of the connected customer: Second edition*, 2018.
4. Rowland Manthorpe, "Wetherspoons just deleted its entire customer email database—on purpose," *Wired*, July 3, 2017.
5. Ledger Insights, "IAB pilots advertising privacy consent blockchain," October 2018.
6. Shareen Pathak, "As brands take marketing in-house, consultancies cash in," *DigiDay*, June 27, 2018.
7. Danny Palmer, "What is GDPR? Everything you need to know about the new general data protection regulations," ZDNet, May 17, 2019.
8. Accessed on the Algorithmic Justice League site on August 15, 2019.
9. Greg Siefkin, "Using data to improve supply chain operations," *MHL Magazine*, December 15, 2018.





# The amplification of consumer participation

How emerging customer engagement strategies are unlocking new value for global brands

IMAGINE IT'S 1870. You are an entrepreneur running a fledgling dry goods business in San Francisco. Based on a conversation with a tool retailer, you sense an opportunity to develop a new product. What do you do next? At this point in history, startups and existing enterprises alike were limited to “word of mouth” participation—to both learn from customers about existing products and services and to inform the design of something new. Businesses could gain insights only through direct interactions with customers. Using this approach, the San Francisco entrepreneur in question learned of the limited availability of durable pants for workmen in the market. In 1873, based on these findings, Levi Strauss & Co. obtained the first US patent to develop the original pair of men’s blue jeans.<sup>1</sup>

This “word of mouth,” which helped develop the Levi’s brand as well as product innovations such as blue jeans, has historically emerged through customer **participation**. In today’s marketplace, participation is at a high, transforming the entire role of marketers and how they work (see our [agility](#) trend for more information). The amplification of global participation through technology provides new opportunities for consumers, citizens, and communities to

engage directly in shaping, influencing, building, and co-creating platforms, initiatives, movements, and brands. The extended reach offered by digital access, and a greater willingness from consumers to play the role of marketer, has helped empower both startups and established brands to orient elements of their business around opportunities to create new products and services and encourage consumers to participate in the process.

While going out to the local hardware store to engage with customers remains a tried and tested marketing strategy, it is likely no longer sufficient to ensure customer participation. Many brands and marketers have recognized that to keep up with the competition, they need to evolve their approach and create a dynamic two-way engagement across all stages of the consumer journey and the product life cycle. Those doing it best are often seeing

**Many brands and marketers have recognized that to keep up with the competition, they need to evolve their approach and create a dynamic two-way engagement across all stages of the consumer journey and the product life cycle.**

willing customer participants become brand ambassadors, influencers, advocates, collaborators, and even innovators, representing and driving brand participation across the marketplace. As Adam Petrick, global director of brand and marketing at Puma, explains, engaging consumers is paramount for global brands: “Our brand is out there in the public space; it’s been consumed by people all around the world, and ultimately, they are the ones that shape it.”<sup>2</sup>

## Participation is all about unleashing the power of the consumer as the brand advocate, with consumers becoming the brand “media.”

In this article on the global marketing trend of participation, we present an inside look at how companies, led by marketing, are shifting their strategies to leverage the power of the consumer. We discuss tactics that brands can deploy at each stage of the customer journey and product life cycle and offer insights on the methods they’re adopting to amplify customer participation.

### Where are brands getting consumers to participate?

Engaging consumers across their entire journey and the product life cycle can enable companies to harvest insights and leverage customer experience, influence, voice, and sentiments to drive development and accelerate growth—from trial to loyalty. Participation is all about unleashing the power of the consumer as the brand advocate, with consumers becoming the brand “media.” From big brands building “design-and-test” crowdfunding campaigns to co-creating products with new technologies such as virtual reality (VR) and 3D

printing, our research reveals the common levers many brands are pulling to engage and build around customer participation. Accordingly, we developed five thematic areas in which brands are helping drive participation today:

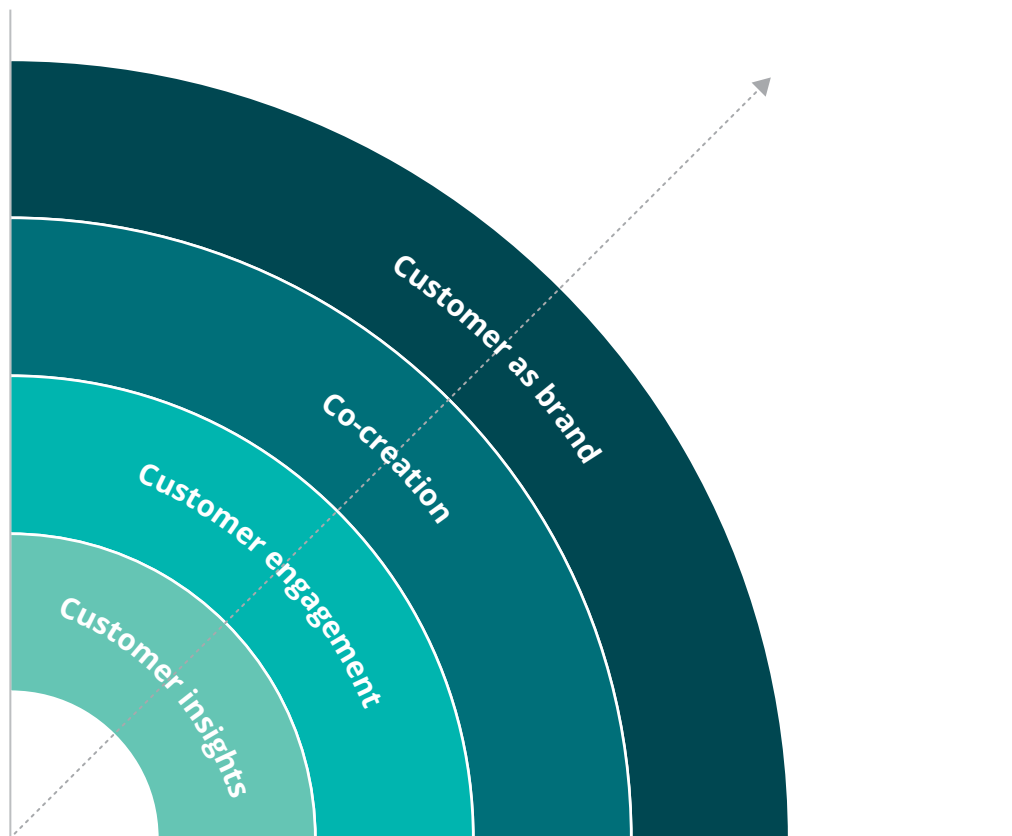
- 1. Virtual truthing.** Online platforms such as Remesh<sup>3</sup> and dscout<sup>4</sup> tap directly into customers and crowds, enabling brands to engage consumers quickly and effectively to gain insights about emerging products and services in nearly real time. For instance, dscout functions as a live video diary, charting how individuals engage with products and services, delivering rich, in-depth insights for a brand. Remesh offers various ground-truthing models. Driven by artificial intelligence (AI) and analytics capabilities, Remesh can be harnessed at “any stage of the customer life cycle” to learn about improving the customer experience.
- 2. Crowdfunding.** Crowdfunding campaigns have been around for the better part of the past decade, helping launch startups and fundraise for new products. By voting with their contributions, individuals can support new ventures, charities, and events that matter to them. In a new wave, bigger brands are leveraging crowdfunding to gain access to consumer insights at different stages of the product life cycle. Customers purchase prototypes, enabling brands to gain critical insights early in the process to support R&D and develop the most creative, demand-driven products. For example, in 2018, Gillette launched its “heated razor” concept to gauge early-stage customer interest through the crowdfunding platform, IndieGogo. The crowd informed the design and helped move the razor into production, purchasing the allotted 1,200 razors within a matter of weeks.<sup>5</sup>

**3. Customization.** Many leading brands are seeking ways to involve the customer directly in customizing designs of new, emerging products. Platforms such as Betabrand allow custom designers and producers to receive early-stage inputs from consumers, who function as co-creators in supporting prototypes.<sup>6</sup> Such platforms help motivated designers gain access to customers and build a following, while customers can show off their skills as “early adopters.” Timberland, for example, is testing new approaches to involve its customers in shaping new designs for boots, while also building loyalty before these designs hit the market.<sup>7</sup>

**4. Collaboration.** Collaborative participation helps integrate customers in different phases of the product life cycle, often enlisting their support in co-creating products, solutions, and services directly with brands. LEGO, for instance, pioneered collaborative, user-created innovations, allowing its vast network of global user groups to directly engage in co-creating their own LEGO creations.<sup>8</sup> Mindsumo is a collaborative platform that helps brands engage customers in collaborations on innovations, while also offering a platform for crowdsourced prize challenges.<sup>9</sup> Ferrero, one of the largest chocolate producers and confectionery companies in the world, engaged its consumers

FIGURE 1

**From customer insights to “customer as brand,” brands are leveraging participation across the spectrum**



Source: Deloitte analysis.



Brands leveraging participation are aspiring toward the same outcome—integrating customer voice, experience, and influence to directly shape and inform how they deliver value to customers to accelerate growth, from trial to loyalty.

on Mindsumo by asking: “What’s your Ferrero Rocher packaging design for Christmas or Valentine’s?”<sup>10</sup> Through this question, the company engaged interested customers to share their inputs, doling out cash awards for the best ideas. Other examples of collaboration include personalizing, designing, and 3D printing a new pair of Adidas shoes right in the store.<sup>11</sup>

- 5. Communities.** Communities are taking shape around specific brands to inform, support, and offer creative advice on how their products can be used. Communities pop up on social sites such as Reddit and Facebook to help brand loyalists and newbies solve problems and experiment with new uses for products. For example, Instant Pot, a pressure cooker, has an active superfan Facebook group that enables people to share recipes and connect while the company gains deeper insights about how customers are using its products.<sup>12</sup> Similarly, Made Unboxed, a furniture retailer in the UK, engages its customers through a dedicated social platform—Instagram—on its website. Followers can upload personal photos on Instagram showing how they’ve integrated Made Unboxed furniture into personal spaces, while fellow enthusiasts can “like” the photo and offer inputs on how to improve the décor. The company’s customers, thereby, function as both service providers and educators, advising other customers on product uses and helping troubleshoot issues with furniture.

## Modeling brand participation: Play the spectrum

As with all other global marketing trends, participation is diffusing in unique ways across brands. To succeed, brands looking to build more effective *participation* strategies should evolve along with their customers. Traditionally, marketers focus upstream in the funnel, with the objective of driving awareness (of products and services) from consideration to trial. This likely won’t work anymore, as opportunities to market to customers across the marketing funnel and customer journey, focusing on the end-to-end experience, have emerged.

While integrating customers into every aspect of the customer life cycle may not be necessary for every brand, those leveraging participation are aspiring toward the same outcome—integrating customer voice, experience, and influence to directly shape and inform how they deliver value to customers to accelerate growth, from trial to loyalty.

In figure 1, we present a visual spectrum representing the stages brands follow to leverage customer participation for their businesses, followed by a description of each stage. From baseline customer insights to full-blown co-creation and the “customer as brand” model, each approach is unique to the individual goals of the brand.

**1. Customer insights.** In some businesses, insights might be all you need to understand your customers. In such cases, brands can deploy this baseline customer participation strategy that includes collecting and harvesting customer insights. Brands can leverage data from “likes,” website click-throughs, and customers interfacing with products and services to inform current and future product development. This model has low investment needs and simply requires data collection platforms, so companies can collect inputs and integrate customer perspectives into product development. Guinness’s Open Gate Brewery in Dublin, the “secret” brewery previously off-limits for the public and even employees (save a few select brewmasters), now invites people inside to taste new experimental beers.<sup>13</sup> Mark Sandys, global head of beer, Baileys, and Smirnoff, explains, “It’s like beta testing ...if there are beers that are really popular in the Open Gate Brewery, we’ll then take them out into a few pubs in Dublin and if they work there, then we’ll have the confidence that we can go and really launch them in a really big way.”<sup>14</sup> In many cases, customer insights harvesting is the



first stage of the journey toward more embedded customer participation.

- 2. Customer engagement.** The next level of engagement is focused on customer advocacy and influence, where customers represent brands in the marketplace as influencers and ambassadors, directly providing user-generated content in many cases. In this model, customers engage on behalf of the brand to inform and support other users at various stages of the product lifecycle. Take the example of furniture retailer, IKEA, which has long experimented with novel ways of engaging its customers. Recently, IKEA revamped its mobile app and shopping portal IKEA Place to include an augmented reality function that enables customers to experiment with designs and share how they could transform a space—be it the home, office, school, or studio. From sofas and armchairs to coffee tables, all products in IKEA Place are 3D and true to scale. It allows customers to experiment with placement and share an image or video of what they bought with other shoppers and with IKEA, informing future purchases and product offerings for IKEA.<sup>15</sup>
- 3. Co-creation.** In co-creation, brands build customer participation directly into the product development life cycle. This model goes beyond

sharing experience and insights. Companies are leveraging crowdfunding approaches, prototyping, and collaborative platforms such as Mindsumo to integrate customer insights, voice, and influence into different product design and development stages. Initially, this was limited to downstream production, but brands are increasingly moving participation up the value chain. LEGO's "My Own Creation,"

## At the highest end of the spectrum, brands are eliciting full-scale participation from customers, getting them to act as part of the brand.

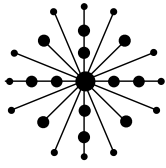
for example, allows customers to build and create their own blocks.<sup>16</sup> In other cases, we see co-creation pushing brands to configure the entire business model around customer participation. The videogame Minecraft is built around users interacting with each other, creating entire worlds for players to engage.<sup>17</sup> Transport applications Waze and Moovit are built based on crowds populating maps and engaging through user-interaction in real time.<sup>18</sup>

- 4. Customer as brand.** At the highest end of the spectrum, brands are eliciting full-scale participation from customers, getting them to act as part of the brand. Airbnb is an example of how companies are building platforms around the customer, with users functioning dually in the role of both brand and consumer. In this model, customers wear other hats as well, acting as educators, trainers, and customer service providers. Another example is GiffGaff,

a mobile service provider in the UK that crowdsources several aspects of its business, including customer support, recruitment, and product development. Customer queries about the mobile service are answered directly by other customers in an online community.<sup>19</sup> In many cases, community platforms provide the stage for customers to act as the brand. For example, China's "Little Red Book," a social e-commerce platform, facilitates buyers to engage in a dynamic world of overlapping customers, product owners, and influencers. Buyers and key opinion leaders (KOL) offer advice on products that are shared across the community, comprising more than 17 million female users. Brands leveraging the platform work to manage their reputation in near real time, ensuring positive content flow from influencers while responding in the moment to any complaints from buyers.

## Pave your own path to participation

Identifying how and in which areas to integrate customer participation in the consumer journey and the product life cycle can be overwhelming for marketing teams and the company at large. There is no right answer as each of these models is relevant and may work for you but should be tailored to your company's strategy and business objectives. Reflecting on your brand and marketing strategy—who you are to your customers and how you can best leverage them across the customer journey/product lifecycle—can set you on the right path to benefit from customer participation.



## CHEAT SHEET

## AMPLIFYING CUSTOMER PARTICIPATION

## FOR THE ENTIRE ORGANIZATION

- ▶ Scale customer participation in new areas by piloting and testing incremental changes to demonstrate proof of concept before moving on to more advanced stages of participation.
- ▶ Acknowledge that results can be hard to predict as forecasting participation is tricky. Be upfront about organizational expectations and transparent while using collaborative and co-creation approaches.
- ▶ Proactively establish policies to address how customer and crowd participation can reshape intellectual property. Consider who owns ideas, and ultimately, products, and how you can continue to encourage customer loyalty.

## FOR THE CMO

- ▶ Integrate consumer participation as part of your brand strategy and marketing program. Keeping an eye on your business objectives, identify and prioritize consumer participation opportunities with the highest impact, for example, co-creation or user-generated content or communities. Be specific in determining how you can use consumer participation to create a competitive advantage to achieve your brand and business goals—for example, to drive increased trials or to attract more high-value customers.
- ▶ Embrace new ways of marketing and keep track of cultural changes to unleash the power of customer participation. Be mindful of the size and scale of problems you are asking consumers to solve, recognizing the correlation to the creativity and impact of customer responses.
- ▶ Lead collaboration and coordination with other organizational entities—R&D, sales, and customer service—involved in customer participation to maximize the value of your outcomes.
- ▶ Demonstrate clear KPIs from customer participation initiatives, including innovation, across the consumer journey and product life cycle. Showcase “wins” internally and externally, further building your brand and reinforcing the power of the consumer to help drive growth.

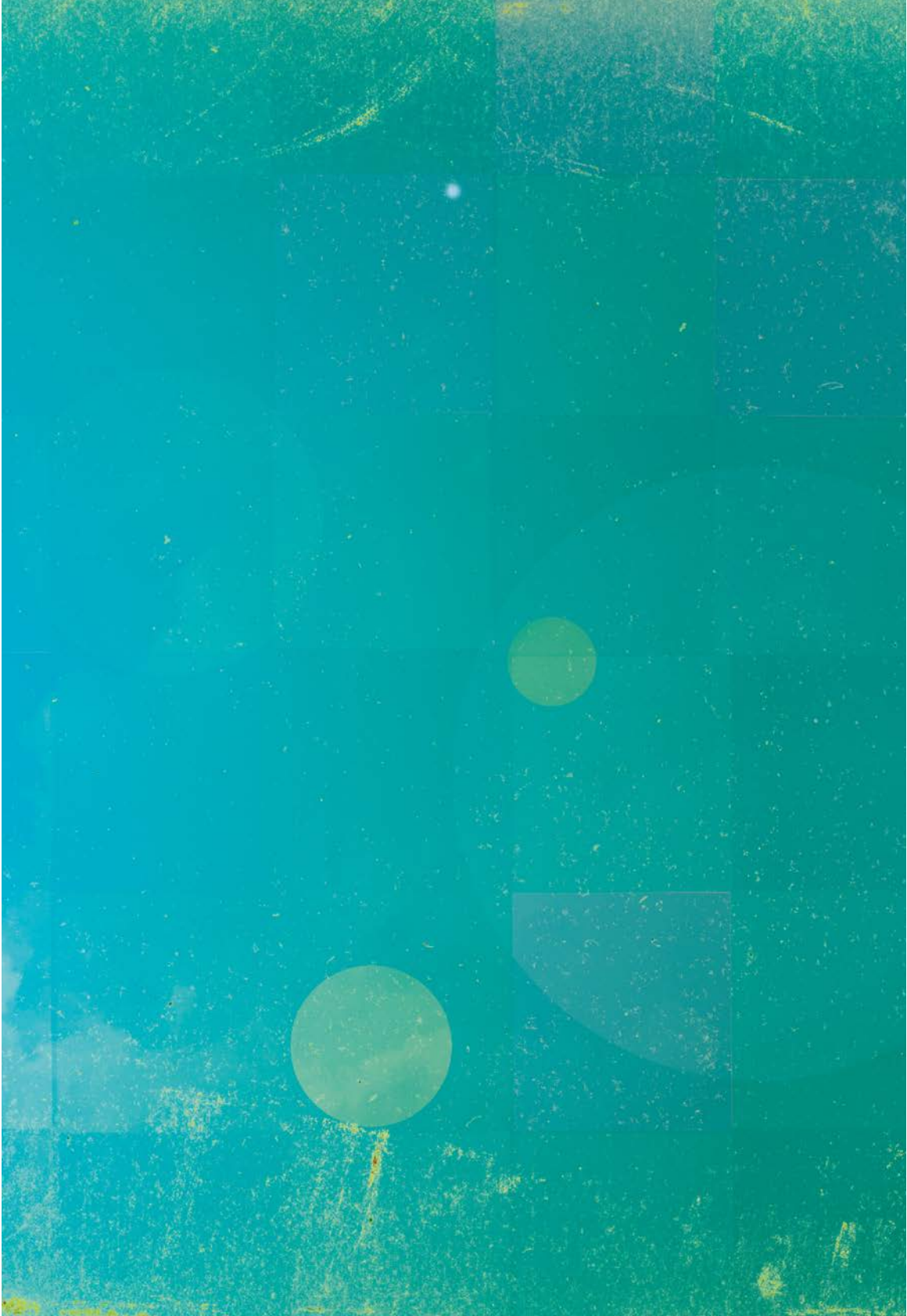
## FOR OTHERS IN THE C-SUITE

- ▶ **CEO:** Set the tone that all answers don't have to come from within the organization and support a culture that embraces external creativity in product creation.
- ▶ **CFO:** Determine costs associated with prizes, IP purchase, and payroll.
- ▶ **CIO:** Provide technology from within the organization or identify partners/vendors/platforms that will produce desired results.
- ▶ **CHRO:** Work with the CMO to align the customer experience within talent practices. Look for ways to use the workforce to represent the brand, both formally and informally, to customers and partners in the marketplace.

## Endnotes

1. Levi Strauss & Co, "Levi's history," accessed September 17, 2019.
2. Adam Petrick (global director of brand and marketing, Puma), interview with Deloitte at the Cannes Lions Festival of Creativity 2019, June 17–21, 2019.
3. Remesh, "Discover real-time customer and employee truth," accessed September 17, 2019.
4. dscout, "In-context insights via remote qualitative research," accessed September 17, 2019.
5. IndieGogo, "The heated razor by GilletteLabs - Sold out," accessed September 17, 2019.
6. Betabrand, "How it works," accessed September 17, 2019.
7. Nikara Johns, "Timberland's first crowdsourced boot available now," Footwear News, May 18, 2016.
8. Yun Mi Antorini, Albert M. Muñoz Jr., and Tormod Askildsen, "Collaborating with customer communities: Lessons from the LEGO Group," *MIT Sloan Management Review*, March 20, 2012.
9. MindSumo, "Crowdsourcing for innovation and insights from millennials," accessed September 17, 2019.
10. Mindsumo, "What's your Ferrero Rocher packaging design for Christmas or Valentine's?," accessed September 17, 2019.
11. Andria Cheng, "How Adidas plans to bring 3D printing to the masses," *Forbes*, May 22, 2018.
12. Megan Giller, "The superfans behind the Instant Pot hype," Engadget, February 18, 2019.
13. Marla Cimini, "Inside the secret brewery Guinness kept locked up for a century," 10Best, September 18, 2018.
14. Mark Sandys (global head of beer, Baileys, and Smirnoff, Diageo), interview with Deloitte at Cannes Lions Festival of Creativity 2019, June 17–21, 2019.
15. Daniel Dasey, "IKEA Place," IKEA, 2017.
16. LEGO, "Newsroom," accessed September 17, 2019.
17. Minecraft, "Minecraft official site," accessed September 17, 2019.
18. Waze, "Free driving directions, traffic reports & GPS navigation app by Waze," accessed September 17, 2019; Moovit, "Moovit: Your public transit guide," accessed September 17, 2019.
19. Rebecca Burn-Callander, "Giffgaff, the 'bonkers' mobile network, proves that the crowd can run your business for you," *Telegraph*, May 26, 2015.







# Valuing your most important asset—talent

## How to account for all people in the workforce experience

IN 1906, WORKING with low-income families out of a small apartment in Rome, Maria Montessori opened the doors of *Casa dei Bambini*, or the “Children’s House.” This one-room classroom marked the first educational setting built on Montessori’s philosophy to *free a child’s potential and transform [them] into the world.*<sup>1</sup> It was here that she experimented and honed her hallmark curriculum and education model that, today, has evolved into an institution encompassing more than 20,000 Montessori schools worldwide.

Placing the child at the center of the design, Montessori realized early in her research that to advance a person’s capabilities, knowledge, accountability, and sense of self (the pillars of Montessori education), each student and their unique traits need to be accounted for and balanced with the Montessori values. Giving young people foundational capabilities, focusing on the individual experience, and cultivating deep human

interactions can help successful students grow into high-functioning, empathetic citizens.

The Montessori model provides a useful mirror for companies to reflect on who they are to all humans across their ecosystem, especially their own people—their workforce. The connectedness of organizations and the reliance on networks and ecosystems is well established (see our [fusion](#) trend). In this world of organizational interdependence, boundaries become blurred, removing categories that segregate customers, workforces, and competitors.

A worker is no longer the average 9-to-5, lunch pail-carrying employee. Rather, an organization’s people are its **talent**, representing a diverse swathe of individuals including brand ambassadors, giggers, social influencers, and partners. These individuals reside both inside and outside the walls of the organization. And just like Montessori students, this diverse workforce requires an

### HOW IN-HOUSE AGENCIES CAN IMPROVE THE TALENT EXPERIENCE

As we explained in our [agility](#) trend, agile processes, teams, and structures are a prerequisite for keeping up with the pace of change across the business landscape today. The need for transformation in marketing sparked a trend in which many brands are bringing the marketing agency “in-house” to be better positioned to react, participate, and predict where conversation and culture are heading in the marketplace. As the walls of the organization become more permeable, the importance of building trust and loyalty across partners and the workforce has risen up the ladder of priorities (see our [trust](#) trend for more).

approach that nurtures the “entire person,” enabling them to evolve and develop new skills and relationships, while building loyalty toward brands and places of employment.

In this new world of talent, it is important for businesses to recognize that their collective workforces often comprise individuals from different backgrounds and diversities, who come with differing perspectives, experiences, and goals. Organizations that acknowledge and value each individual’s experience place the human at the center of what they do, aiming to create a sustained and connected experience for all their people. As marketing departments move in-house and transform to smaller, multi-disciplinary teams, it can be critical that they work to help ensure each person is nurtured and valued across the organization (see sidebar, “How in-house agencies can improve the talent experience”).

To create an environment that values all people, bold leadership from within the marketing function should champion the human experience (see our [human experience](#) trend) and help ensure that the workforce is included.

Our global marketing *talent* trend explores how many marketing functions today are transforming organizations by serving in new capacities. The role of the marketing department is shifting as a result of greater customer participation (see our [participation](#) trend), new organizational structures to deliver marketing campaigns (see our [agility](#) trend), and a need to manage the human experience better. Many CMOs and marketers are stepping into the role of facilitators of the human experience to help ensure every person’s capabilities, experiences, and goals are accounted for across the organization.<sup>2</sup>

In this article, we present insights and strategies on the ways many leading brands are integrating the

workforce experience into their talent approaches. We also discuss the implications of this trend for marketers and marketing departments who are thinking about adopting workforce-centric models.

## Integrating the talent and customer experiences

Across the seven global marketing trends, we see a common theme—*the human connection matters more than anything else*. Successful organizations should account for all humans within their ecosystem (including the workforce) and align them with the organization’s purpose. Below are two examples that showcase how companies are helping ensure they deliver a world-class experience for their talent:

- 1. The holistic human experience at Alexion:** Alexion Pharmaceuticals recognizes the importance of the employee experience in achieving results for the brand. Identifying an “inherent, powerful connection between the experience of employees at Alexion and the experience of the patients [they] serve,” Alexion introduced a chief patient and employee experience officer. This new officer’s responsibility is to ensure Alexion’s work environment comprises talent who have access to the right capabilities, tools, and support to perform and maximize their collective impact.<sup>3</sup> The officer combines the patient experience and customer insights with the human resource function to create interactions between Alexion’s workforce and patients. The company organizes direct, empathy-based exercises and training such as “sharing circles” to help employees connect with people living with rare diseases, opening opportunities for deeper, more empathy-driven solution designs, while helping Alexion’s people understand the meaning of its work.<sup>4</sup>

**2. Adobe's HR disruptor:** Adobe combined the role of chief human resource officer (CHRO) with the role of executive vice president of customer and employee experience (CEXO). Following a rallying cry of “disrupt or be disrupted,” Adobe's CHRO/CEXO wears multiple hats, hyper-focuses on the customer-employee relationship, and concentrates on the overlap.<sup>5</sup> In integrating the CHRO role with the CEXO, Adobe aimed to centralize its people-centered functions to account for humans both inside and outside of its decision-making.<sup>6</sup>

These two instances show how brands are applying tried-and-tested strategies from customer engagement to improve and create a diverse and deeper workforce experience. By leveraging insights to understand and account for each person, marketing departments can lead the entire organization in finding innovative ways to help ensure consistency in the talent experience.

## How marketing can unlock the talent experience

Having understood how to engage customers beyond the walls of the organization, many marketers are embracing the challenge of creating deeper, more meaningful engagement with their people. Drawing on our research, we outline specific strategies that show how many companies are supporting the talent experience:

**1. Build a symbiotic workforce and customer experience.** Your workforce can be your best ambassador. Being authentic to your workforce, leading with values, and supporting collaboration across the organization strengthens the human experience for all people and helps provide an environment in which your workforce can thrive. Take the example of Qualtrics and Volkswagen (VW) Australia, which teamed up to develop a unique platform for the automobile maker to leverage customer experience data overlaid with employee experience data. Using Qualtrics' systems, which

In this new world of talent, it is important for businesses to recognize that their collective workforces often comprise individuals from different backgrounds and diversities, who come with differing perspectives, experiences, and goals.

leverage AI and customer data, VW Australia can explore opportunities to improve engagement with its workforce and drive the talent experience. VW Australia dealers rely on superior customer service to drive sales. By using both customer and workforce experience data, VW Australia uncovered an opportunity to invest in upgrading its dealer facilities. As a result, VW Australia is currently experiencing sustained sales growth and holds the highest retention rates and workforce experience scores in the company's history.<sup>7</sup>

**2. Value personal interaction.** In the new world of work, it can be difficult to evoke loyalty in the workforce, with more than half of all workers thinking about leaving their jobs, according to a recent Deloitte report on talent in the workforce.<sup>8</sup> Retaining people typically requires building real relationships. Companies often design tech-enabled sensing and monitoring systems to track and gather feedback on the talent experience. However, the challenge is to identify the appropriate time to implement and use feedback rapidly.

Pulsing surveys sense how and whether the workforce is having a good experience and if they might leave the company. Making these surveys a routine practice can enable real-time course correction if a person is contemplating changing jobs. Unlock the value of data to understand how and whether people are fulfilled in their work, but do not lose touch with the value of personal interaction. Many workers especially value opportunities to build relationships with each other and with leadership. Find time to meet face to face and

use pulsing survey data to assess how a person is feeling in the moment to share positive stories, praise, and mitigate challenges.

**3. Go beyond the four walls.** The marketing function and the CMO already serve as brand ambassadors for customers. In the new world of work, it can be increasingly difficult to uphold values (see our *human experience* trend) and understand who aligns with your purpose outside of your walls. Similarly, what it means to be part of the workforce is changing dramatically, making it even more important for companies to have oversight of every person's "talent experience."

Approaches such as those adopted by Alexion and Adobe to integrate roles and provide oversight beyond what the human resource manager has can help ensure consistency in the talent experience while upholding values beyond the organization. For instance, a large financial services institution recognized a need for blended roles to account for the dynamic world in which it operates. By analyzing internal interviews with integrated

**Many marketers are embracing the challenge of creating deeper, more meaningful engagement with their people.**

marketing-and-communications leaders and external market research on the future of work, four new marketing roles emerged for consideration—macro-trends spotter, sponsorships and partnerships curator, chief storyteller, and consumer anthropologist. The goal of these roles is to bridge gaps and better account for the collective customer, workforce, and partner experience.

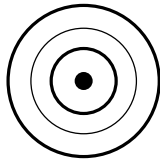
**4. Recognize the trust dividend.** Just as a brand considers with whom it should partner,

talent evaluates for whom they work and how long they stay with a company. Companies are getting smarter at leveraging the troves of workforce data at their disposal to understand the talent experience, but they should also be smart about maintaining transparency with their workforce, what metrics they track, and how they use the findings. Using data responsibly can help improve the overall talent experience while translating into deeper loyalty between the workforce and the organization. Google, Amazon, and Intel, which frequently notch the highest rankings for the best places to work in tech, leverage routine pulsing surveys and use data to improve the overall workforce experience. Communicating in an open, transparent manner, these companies share

what data they collect, what they do with it, and how the data leads to improvements for the workforce.<sup>9</sup>

## Accounting for all humans

As the walls of the organization continue to expand, the need for new roles is increasing. To help ensure and meet the demands of a growing and changing workforce, the marketing function (along with the CMO) can serve as a leader, convener, and facilitator to build a culture and space that supports each individual worker by accounting for their capabilities, experiences, and goals—gaining loyalty in the process.



## CHEAT SHEET

# IMPROVING THE TALENT EXPERIENCE

### FOR THE ENTIRE ORGANIZATION

- ▶ Understand the limitless talent options available to you—giggers, influencers, ambassadors, and full-time people—and build a talent model around your values to account for each person's capabilities, experience, and goals.
- ▶ Look for opportunities to create direct, face-to-face engagement with your people. Relationship building can't be automated or done exclusively through technology—invest time to gain loyalty.

### FOR THE CMO

- ▶ Understand how to engage the talent experience to add more value to the customer experience.
- ▶ Serve as a facilitator to help talent in understanding their connections with customers; help increase understanding of the talent experience across leadership.
- ▶ Ensure that the brand's purpose and values are upheld inside and outside the organization, across all workforce and partner relationships.
- ▶ Champion the perspectives of both customers and the workforce in strategic decision-making.

### FOR OTHERS IN THE C-SUITE

- ▶ **CEO:** Understand that experience is the driver to match brand promise, deliver a personal digital touch, and help the workforce understand how their work transcends the workplace.
- ▶ **CFO:** Pay for talent, explore whether an in-house model vs. a partnership model makes the most sense, optimize financial processes for skills, jobs, and workforce models.
- ▶ **CIO:** Leverage technology and data systems to enable customer and workforce data tracking in order to integrate and create connections between human experiences.
- ▶ **CHRO:** Map current and future skills to understand new talent, skills, and roles.



## Endnotes

1. American Montessori Society, "Why choose Montessori education," accessed September 16, 2019.
2. Art Mazor et al., *Measuring human relationships and experiences*, Deloitte Insights, June 20, 2019.
3. Anne-Marie Law, "People-centricity: Connecting the employee experience to the patient experience," 3BL Media, June 12, 2019.
4. Ibid.
5. Adobe, "Donna Morris, chief human resources officer & executive vice president, employee experience," accessed September 16, 2019.
6. Denise Lee Yohn, "Why every company needs a chief experience officer," *Harvard Business Review*, June 13, 2019.
7. Qualtrics, "Volkswagen Group Australia + Qualtrics," accessed September 16, 2019.
8. Robin Erickson, Denise Moulton, and Bill Cleary, "Are you overlooking your greatest source of talent?" *Deloitte Review* 23, July 30, 2018.
9. SurveyMonkey, "How 3 of the best companies to work for use surveys," accessed September 16, 2019.



# Diffusing agility across the organization

How leading brands are building capabilities to market for moments

DEBATE, ITERATE, PIVOT, agile—once considered buzzwords heard only at the local startup incubator, these concepts are now ubiquitous across global businesses. To create and maintain an edge in today’s complex, demanding marketplace, companies often need adaptive models that can enable them to keep up with the speed of culture, conversation, and digitization. The dynamic social, economic, and cultural environment also necessitates agile decision-making—particularly in marketing, where increasingly discriminating buyers are adopting, consuming, and disposing of brands more frequently and casually.

Many leading brands are separating themselves from the pack by being more purposeful and

hyper-focused than ever on the human experience, necessitating a different way of working for their marketing teams. Other brands should follow suit—moving from reactive to proactive engagement in order to address the wants and whims of customers—or potentially be left out of the race. For this, they should restructure their marketing functions, leverage the power of real-time data accessed through digital platforms, and quickly gain insights to design more personalized, human experiences in an agile manner (see sidebar, “What is agile marketing?” for more).

Agility is both a framework and a mindset. It encourages organizations to embrace immediate and novel ways of thinking while helping them restructure in a way that allows their brand to join

## WHAT IS AGILE MARKETING?

Agility draws on the key principles of “agile”<sup>1</sup> software development. It is a framework that can enable organizations to move closer to customers by helping them embrace adaptive thinking and structure cross-functional teams to increase their speed, quality, flexibility, and effectiveness in reacting to moments in the market. It also can help companies capitalize on emerging technologies such as artificial intelligence (AI) to predict and generate meaningful engagements with customers in nearly real time.

Agility pushes marketing to move beyond mere content creation by offering an organizational model for businesses to quickly design, create, and launch marketing campaigns. An agile model can allow companies to validate hypotheses and pivot based on customer interactions and timely insights. Further, agility facilitates learning and assessing the impact of marketing on connections with customers to capture return on investment.



To create and maintain an edge in today's complex, demanding marketplace, companies often need adaptive models that can enable them to keep up with the speed of culture, conversation, and digitization.

*conversations* and *moments* organically. Here are two examples showcasing how businesses are becoming more agile:

- **TD Bank maximizes operational flexibility:** Realizing the importance of tailoring its services for its customers, TD Bank sought new methods to tap into digital platforms to unlock a deeper understanding of the customer experience. After shifting its marketing investments online, TD Bank needed to leverage customer data more effectively to tailor products and deliver personalized messaging to customers in real time. This required the bank to examine its approach to content generation, while its operational structure required greater flexibility to respond and react to the story the data was telling. To achieve this, TD Bank redesigned its marketing function from a traditional one to one based on “marketing pods”—cross-functional teams capable of rapid prototyping and iteration in producing content.<sup>2</sup>
- **JetBlue improves customer service through Twitter:** Traditionally considered a no-frills, low-cost airline, JetBlue recognized the opportunity to enhance its brand identity through improved customer service. The company decided to leverage Twitter to support its customers as close to real time as possible on their journeys. Under this program, JetBlue encourages customers to tweet their needs and complaints to its account and ensures they receive immediate replies, explaining what is causing flight delays or other problems. In addition, taking cues from the tweets, JetBlue deploys its airport staff to help passengers on the ground. Through these efforts, the airline repositioned itself as a “customer service company that happens to fly planes.”<sup>3</sup> So, what made this possible? JetBlue transformed its customer service operations by removing oversight and hierarchical bottlenecks to empower employees to independently respond to issues as they arise.

TD Bank and JetBlue are just two examples of companies realizing the need for new approaches to better engage with customers. Across the marketing

landscape, our analysis illustrates how many global brands are embedding agile across their organizations in diverse ways. In the **agility** trend, we delve into common organizational approaches that demonstrate agility in action and discuss the transformation that may be required in marketing departments to implement these approaches.

## Agile in action: Two ways to act

Being agile typically requires marketers to shift from conventional approaches of generating marketing content to new, tech-enabled, moment-centric ones. Traditional marketing strategies were built around single campaigns, where static advertisements were developed in stages, turned on, and then turned off when the campaign ended. Brands latching on to agile should recognize the need to adapt both the framework and mindset across the organization. They should also build internal capabilities and cross-functional teams that speed up their reaction time to capitalize on societal moments, while leveraging predictive technologies to gain a share of culture and conversation rather than just a share of voice or brand impression. Our trends research surfaced two specific agile strategies organizations are adopting:

1. **Building the “if/then” campaign.** With agile approaches, marketers create batches of marketing content to be rolled out in a 48- to 72-hour window, if trends or live events chart a specific course in real time. For instance, printing world championship T-shirts of both competitors in a major sporting event. Sports apparel companies and franchises have scaled this “if/then” thinking to the marketing department. As sports seasons and end-of-year tourneys

unfold, marketing teams prepare for possible outcomes by crafting alternate campaigns to prepare for winners in key championship games. This approach requires companies to produce batches of content in advance based on an “if/then” condition and push it out depending on the outcome of the event or trend.

2. **Acting in near real time.** Brands at the forefront of real-time engagement with customers are doing more than simply increasing the speed of their reaction time. They’re fundamentally shifting their culture and organizational structure—including reconfiguring their marketing departments—to support real-time customer engagement.<sup>4</sup> Fernando Machado, global CMO at Burger King, attributes his company’s marketing successes to their “desire to be constantly engaging with our fans and our guests. And we know that we can only accomplish that if we move fast.”<sup>5</sup> Moving fast is essential to Burger King’s “Traffic Jam Whopper” program, which debuted in Mexico City in spring 2019. Utilizing real-time traffic data to determine when roads near a Burger King (BK) are congested, the company pushes prompts to digital billboards and displays banner ads within the Waze traffic app. Drivers can order on the BK app through voice commands to avoid texting while driving. The billboards then display updates when food is en route and orders are delivered directly to cars stuck in traffic via motorcycles using Google Maps. Burger King reported a 44 percent increase in BK app downloads and a 63

**Brands latching on to agile should recognize the need to adapt both the framework and mindset across the organization.**

percent increase in daily delivery orders as a result of this program.<sup>6</sup>

As these examples demonstrate, the accelerating velocity of technology can create opportunities for brands to continuously evolve their messaging and *human experience* based on near real-time customer insights.

## Making agile work: Diffuse it across the organization

To put agile to work, many marketers are diffusing the time-boxed, iterative approach across their organizations in three ways. First, they're recognizing the need to be cross-functional and embracing a newsroom approach—breaking operational barriers and silos by bringing people closer together to produce content in the moment. Second, marketing teams are delivering content in a more agile manner by embracing new ways of working. These include daily standups, scrums, and piloting and testing methods that can enable teams to work in shorter sprints and move away from annual and quarterly content calendars. Finally, new emerging technologies, led by AI and analytics, are supporting organizations in predicting culture and the direction in which the conversation is moving.

The following examples show how some marketing departments are making agile work for their brands and how you can too:

- 1. Adopt newsroom-style operations.** Many companies realize that embodying agile means improving the cross-functionality and proximity of their teams and, often, restructuring of their marketing function to build newsroom-like operations. Take the example of Taco Bell, which instituted a newsroom model to capitalize on the moment after it realized customers were accessing the

brand and were most active on its social media channels between 9 p.m. and 2 a.m. From copywriting and legal to public relations and content designers, Taco Bell brought traditionally siloed groups together, enabling shorter lead times, instantaneous legal approvals, and quicker decision-making. This restructuring helped it gain a share of the conversation with customers in the moment, based on what its sensing and data capabilities were saying.<sup>7</sup>

Bosch, a German engineering and technology company, similarly recognized the value of proximity among teams in an agile approach. It abolished its traditional structural hierarchy and created small, matrixed business teams, all reporting to a management board. Each “purpose team,” as they were called, was built around specific product and design goals.<sup>8</sup> The restructuring required teams to interact more frequently. Daily standups were instituted to

## Many companies realize that embodying agile means improving the cross-functionality and proximity of their teams and, often, restructuring of their marketing function to build newsroom-like operations.

produce content in batches, while the marketing team developed the ability to quickly test and incorporate data to see what was working and what was not.

- 2. Pilot then scale.** Many marketers are piloting agile within a single business unit to test, learn, and iterate how they can make it work for their organizations. For instance, TD Bank in Canada

wanted to embrace agile in its digital marketing function.<sup>9</sup> The marketing team started with an assessment of the company’s digital maturity across business units to understand where they fell on the digital adoption curve, before piloting agile within a single business unit to gain insights on how to diffuse it across the company. Pulling together six cross-functional workers—from content, analytics, strategy, planning, and leadership—the team developed a “north star” to guide its agile approach with the goal of increasing the number of insurance quotes. Utilizing daily standups and a scrum model, the team ran two-week design sprints over three months, documenting experiences to present lessons learned to the business leadership; the aim was to understand the secret sauce for scaling agile across the company. Lowering barriers to entry by deploying agile in one unit enabled TD Bank to create a scaling plan and adopt it over time. Through the agile pilot, the bank cut costs by 30 percent in the first month and campaign turnaround time within digital marketing moved from four-month timeframes to two weeks. TD Bank also learned that demonstrating the ROI to leaders and achieving quick wins would help other units adopt agile as the company scaled the approach.<sup>10</sup>

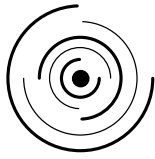
3. **Deploy predictive sensing.** Agile marketing typically requires internal teams to listen to the conversation and produce content in short windows by testing, measuring, and predicting consumers’ purchases, discussions, and reactions. Marketers have predictive technologies and AI tools such as Heat AI<sup>11</sup> to aid them in this “predictive sensing” process. Analytics and AI tools can provide marketers with “social intelligence,” enabling them to

predict and sense where conversations are heading. Content and conversations recycle every six hours on average; thus, speed in sensing is key to staying relevant. These tools also help marketing teams quickly identify whether their content is meeting its desired results in the moment. Conversations can be forecast 72 hours in advance, allowing a brand roughly three days to anticipate, create, and launch content.<sup>12</sup>

For example, in 2018, Facebook and National Geographic teamed up to grow a new community focused on “Women of Impact.” Leveraging sensing technology and AI to crowdsource and predict trending keywords and topics, the team created content using agile and expanded the community to four times its original size in just two weeks.<sup>13</sup> Armed with such insights, flexible teams can abandon an underperforming idea, pivot, and update their creative approach to capitalize on what is being learned. On the back end, insights and patterns in the data also reveal the impact of the investment, offering learnings for the organization on where to go next.

## Accelerating for moments that matter

Marketing leaders and departments can lead the agile charge for the entire organization, and in the process, transform their companies into customer-centric operations. By embracing agile across structures, teams and processes, and mindsets, brands are better suited to act and capitalize on moments to create deeper engagement with customers.



## CHEAT SHEET PUTTING AGILE INTO ACTION

### FOR THE ENTIRE ORGANIZATION

- ▶ Take a newsroom-style approach to data collection that informs your agile campaign.
- ▶ See real-time conversations and events as an opportunity to engage with your customer base around your brand purpose, point of view, and personality.
- ▶ Leverage AI-driven platforms such as Heat AI to drive near real-time customer insights that can inform more tailored, agile content at the speed of culture and conversation.
- ▶ Structure your content workflow so that content stakeholders can review and approve content in tight windows of time.
- ▶ Apply a “theory of constraints” approach to identify where the weakest links in the organization might be as agile is implemented. Find the bottlenecks and map the interdependent activities required to make it successful.

### FOR THE CMO

- ▶ Utilize newfound data and analytics as evidence to show ROI in agile approaches.
- ▶ Collaborate to break down silos by evangelizing for putting the customer at the center of organizational decision-making.
- ▶ Let marketing be the agile champion for the organization. Use an agile approach to build your marketing function, clearly communicate success, and bring team members along by incorporating their feedback throughout the process.

### FOR OTHERS IN THE C-SUITE

- ▶ **CEO:** Empower each function to collaborate and adopt agile processes to know consumers' needs and wants from the outside-in. Help remove organizational icebergs; start small and gain buy-in team by team; consider how roles may need to adapt and change based on what works.
- ▶ **CFO:** Support necessary financial investments in systems and talent to enable agile processes to take hold and evolve.
- ▶ **CIO:** As the owner of data, collaborate closely with the CMO to leverage technology and AI to fuel creative and marketing.
- ▶ **CHRO:** Consider what types of new thinking and mindsets are needed in the workforce to become more agile; invest in reskilling and training.



## Endnotes

1. Deloitte, *Don't fear change, embrace it: Advancing the case for agile methods in systems integration*, April 2010.
2. Mary Morrison, "TD's agile approach to always-on marketing," *CMO Today*, January 27, 2019.
3. Lindsay Kolowich, "Delighting people in 140 characters: An inside look at JetBlue's customer service success," HubSpot, July 28, 2014.
4. Christine Austin, "9 Facebook Live for business examples you've got to see," IMPACT, January 10, 2018.
5. Fernando Machado (global CMO at Burger King), interview with Deloitte at the Cannes Lions Festival of Creativity 2019, June 17–21, 2019.
6. Tony Markovich, "Burger King uses real-time data to deliver Whoppers to drivers in traffic," Autoblog, May 15, 2019.
7. *PR News*, "Case study: Taco Bell's new recipe for social media engagement: Look, listen and whip up some dialogue with fans," September 9, 2013.
8. Phil Wainwright, "How Bosch broke free from silos to reorganize as agile teams," *diginomica*, February 7, 2019.
9. Marketing Agility, "Driving agile adoption up and down the marketing function with Deloitte," podcast, 29:30, November 27, 2018.
10. Ibid.
11. Heat, "Heat AI," video, 1:49, accessed September 17, 2019.
12. Lindsay Rittenhouse, "Deloitte's Heat: A 'wake-up call' for other creative shops?," *Ad Age*, June 11, 2019.
13. Jocelyn Lee, "Using cognitive to inform creative," *CMO Today*, September 10, 2018.

## About the authors

### **Diana O'Brien | [dobrien@deloitte.com](mailto:dobrien@deloitte.com)**

Diana O'Brien is the global chief marketing officer for Deloitte responsible for driving growth across all businesses. In this role, O'Brien connects a network of brand, communications, marketing, and insights organizations. Her responsibility is to champion the voice of the customer, surface deep insights with advanced analytics, increase sales velocity, and gain greater competitive advantage with stronger, differentiated experiences. One of Forbes' World's Most Influential CMOs, O'Brien also leads the C-suite CMO Program at Deloitte and serves as an advisory partner to global life sciences clients. Connect with her on LinkedIn at <https://www.linkedin.com/in/dianaobrien/> and on Twitter @DianaMO'Brien.

### **Andy Main | [amain@deloitte.com](mailto:amain@deloitte.com)**

Andy Main is a principal with Deloitte Consulting LLP, and global head of Deloitte Digital. In this role, he helps clients gain business value by using digital to improve their engagement with customers, employees, partners, communities, and suppliers at every touch point along the journey. Main brings more than 25 years of consulting industry experience, which enables him to bring new ideas to market quickly, and pragmatically apply these ideas to help clients modernize their businesses. Connect with him on LinkedIn at <https://www.linkedin.com/in/andymain/> and on Twitter @scotinco.

### **Suzanne Kounkel | [skounkel@deloitte.com](mailto:skounkel@deloitte.com)**

Suzanne Kounkel is a principal with Deloitte Consulting LLP and the chief marketing officer of Deloitte US, where she leads marketing and sales integration across businesses to create powerful results for clients and drive growth. She also serves as the chief marketing officer for Deloitte Consulting LLP, where her work encompasses the full suite of marketing and communications services to support the US consulting business, including sub-branding and positioning, content marketing, public relations, and internal communications. Connect with her on LinkedIn at <https://www.linkedin.com/in/suzannekounkel> and on Twitter @suzanne\_kounkel.

### **Anthony R. Stephan | [astephan@deloitte.com](mailto:astephan@deloitte.com)**

Anthony R. Stephan is the US head of Deloitte Digital for Deloitte Consulting LLP and the national business unit leader for the Customer & Marketing business. He is passionate about the human experience as the foundation of how businesses create value and stronger connections with people, markets, and ultimately earnings. Prior to leading the Deloitte Digital business, Stephan served as the national leader for the Technology Strategy and Transformation business. For more than 25 years, he has guided businesses on the verge of transformation, leaning in with aspirations to inspire change while driving balanced growth through strategic initiatives. Connect with him on LinkedIn at <https://www.linkedin.com/in/anthonyrstephan/> and on Twitter @anthonyrstephan.

## Acknowledgments

This report would not be possible without the subject matter expertise that results from working alongside executives on the front lines to understand the impact of these trends in the marketplace and how to embrace them to drive growth for organizations.

Thank you to the following contributors:

### OUR GLOBAL LEADERS CONTRIBUTING ACROSS THE ENTIRE 2020 GLOBAL MARKETING TRENDS REPORT

- **David Redhill**, Partner, Deloitte Consulting Global CMO, Australia
- **Mike Brinker**, Principal, Global Deloitte Digital Leader, US
- **Will Grobel**, Director, Customer & Marketing, UK
- **Andrew Jolly**, Partner, Digital Mix Lead, UK
- **Peter Sedivy**, Partner, APAC Deloitte Digital Lead, US
- **David Phillips**, Partner, Brand, Creative & Media, Australia
- **Pascual Hua**, Partner, Deloitte Digital, China
- **Ryo Kanayama**, Director, Chief Brand & Corporate Affairs Officer, Japan
- **Desiree Phakathi**, Senior Manager, Marketing, South Africa
- **Tharien Padayachee**, Manager, Marketing & Communications, South Africa
- **Livia Zufferli**, Income & Associate Partner, Customer & Marketing, Canada
- **Pablo Selvino**, Partner, Consulting Director, LATCO
- **Heloisa Montes**, Partner, Digital Customer & Marketing Transformation leader, Brazil
- **Renato Souza**, Director, Communication & Brand, Brazil
- **Victor Press**, Partner, Acne, Northwest Europe
- **Jennifer Veenstra**, Managing Director, CMO Program leader, US

### THE EDITORIAL TEAM FROM THE CENTER FOR INTEGRATED RESEARCH

- **Tim Murphy**, Senior Manager, US
- **Josh Schoop**, PhD, Manager, US

### THE GLOBAL MARKETING TRENDS TEAM

- **Anna Syrakis**, Manager, Global Marketing Trends Program Manager, US
- **Julie Murphy**, Manager, Marketing Manager, US
- **Marion Cannon**, Lead, Content & Insights, US
- **Natalie Melamed**, Senior Manager, Content & Insights, US

## Purpose is everything

- **Jennifer Barron**, Principal, Brand & Growth Strategy, US
- **Torsten Gross**, Managing Director, Customer & Applied Design, US
- **Richard Prévost**, Senior Manager, Branding, Marketing & Advertising Lead, South Africa
- **David Olsson**, Partner, Acne, Sweden
- **Ori Mace**, Senior Manager, Acne, Sweden
- **Andy Sandoz**, Partner, Chief Creative Officer, Deloitte Digital, UK
- **Mark Hutcheon**, Director, Risk Advisory, UK

## Paying down experience debt

- **Amelia Dunlop**, Principal, Customer Strategy & Applied Design Leader, US
- **Ashley Reichheld**, Principal, Customer & Marketing Automotive, Transportation, Hospitality & Services sector leader, US
- **Stacy Kemp**, Principal, Customer & Marketing Strategy, US
- **Maggie Gross**, Senior Manager, Heat, US
- **Megan Fath**, Senior Manager, Customer & Applied Design, US
- **Emma Gu**, Manager, Customer & Applied Design, China
- **Thomas Kant**, Manager, Deloitte Neuroscience Institute, Germany
- **Olivier Binse**, Partner, Head of Digital Advisory, Deloitte Digital, UK
- **Deborah Womack**, Director, Customer & Marketing, UK
- **Susie Nursaw**, Director, Deloitte Digital Insights, UK
- **Peta Williams**, Senior Manager, Deloitte Digital Marketing & Insights, UK

## Fusion is the new business blend

- **Paul Magill**, Managing Director, Customer & Marketing, US
- **Larry Keeley**, Managing Director, President, Dublin, US
- **Mike Barrett**, Principal, President, Heat, US
- **Will Grobel**, Director, Customer & Marketing, UK
- **Tom Day**, Director, Market Gravity, UK
- **Alex Curry**, Partner, Monitor Deloitte, UK
- **Dan Adams**, Partner, MarTech & Insight leader, UK

## Are you a trust buster or builder?

- **Jeff Weirens**, Principal, Global Business Leader of Financial Advisory, US
- **Jeff Simpson**, Principal, Customer & Marketing, US
- **David Cutbill**, Principal, Marketing and Advertising Risk Services Leader, US

- **Cameron Brown**, Director, Head of Privacy, UK
- **Will Grobel**, Director, Customer & Marketing, UK
- **Peta Williams**, Senior Manager, Deloitte Digital Marketing & Insights, UK
- **Wendy Stonefield**, Director, Customer & Marketing, UK
- **Nick Purdon**, Director, Customer & Marketing, UK

### The amplification of consumer participation

- **Jennifer Lacks Kaplan**, Principal, Customer & Marketing, US
- **Melissa Schwarz**, Senior Manager, Deloitte Pixel leader, US
- **Balaji Bondili**, Senior Manager, Hybrid Solutions & Incubation, US
- **Grace Ling**, Partner, Consulting, China
- **Emma Gu**, Manager, Customer & Applied Design, China
- **Andy Sandoz**, Partner, Chief Creative Officer, Deloitte Digital, UK
- **Matt Guest**, Partner, Deloitte Digital, UK
- **Monica Hu**, Manager, Deloitte Digital, UK
- **Alex Curry**, Partner, Monitor Deloitte, UK

### Valuing your most important asset—talent

- **Jannine Zucker**, Principal, Human Capital, US
- **Ashley Reichheld**, Principal, Customer & Marketing Automotive, Transportation, Hospitality & Services sector leader, US
- **Hilary Horn**, Managing Director, Human Capital, US
- **Yohan Gaumont**, Equity Partner, Digital Customer leader, Canada
- **Will Grobel**, Director, Customer & Marketing, UK
- **Gillian Simpson**, Director, Customer & Marketing, UK
- **Rupert Darbyshire**, Director, Human Capital, UK

### Diffusing agility across the organization

- **Mike Barrett**, Principal, President, Heat, US
- **Jocelyn Lee**, Senior Manager, Head of AI, Heat/Deloitte Digital, US
- **Alan Schulman**, Managing Director, Chief Creative Officer, Deloitte Digital, US
- **Ed Grieg**, Senior Manager, Chief Disruptor, Deloitte Digital, UK
- **Martin Willets**, Partner, Customer & Marketing, UK
- **Yohan Gaumont**, Equity Partner, Digital Customer leader, Canada
- **Verusha Maharaj**, Senior Manager, Monitor Deloitte, South Africa

Special thanks to the CMO Program team and the leaders of Customer & Marketing and Deloitte Digital for their insight and support through this journey.

## Contact us

*Our insights can help you take advantage of change. If you're looking for fresh ideas to address your challenges, we should talk.*

**Diana O'Brien**

Global chief marketing officer | Principal | Deloitte Consulting LLP  
[dobrien@deloitte.com](mailto:dobrien@deloitte.com)

**Andy Main**

Global head of Deloitte Digital | Principal | Deloitte Consulting LLP  
[amain@deloitte.com](mailto:amain@deloitte.com)

**Suzanne Kounkel**

US chief marketing officer | Principal | Deloitte Consulting LLP  
[skounkel@deloitte.com](mailto:skounkel@deloitte.com)

**Anthony R. Stephen**

US head of Deloitte Digital | Principal | Deloitte Consulting LLP  
[astephan@deloitte.com](mailto:astephan@deloitte.com)



# Deloitte.

## Insights

Sign up for Deloitte Insights updates at [www.deloitte.com/insights](http://www.deloitte.com/insights).



Follow @DeloitteInsight

### **Deloitte Insights contributors**

**Editorial:** Prakriti Singhanian, Nairita Gangopadhyay, Anya George Tharakan, Rupesh Bhat, and Preetha Devan

**Creative:** Anoop K R and Sonya Vasilieff

**Promotion:** Alexandra Kawecki

**Cover and chapter artwork:** David Vogin

### **About Deloitte Insights**

Deloitte Insights publishes original articles, reports and periodicals that provide insights for businesses, the public sector and NGOs. Our goal is to draw upon research and experience from throughout our professional services organization, and that of coauthors in academia and business, to advance the conversation on a broad spectrum of topics of interest to executives and government leaders.

Deloitte Insights is an imprint of Deloitte Development LLC.

### **About this publication**

This publication contains general information only, and none of Deloitte Touche Tohmatsu Limited, its member firms, or its and their affiliates are, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your finances or your business. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

None of Deloitte Touche Tohmatsu Limited, its member firms, or its and their respective affiliates shall be responsible for any loss whatsoever sustained by any person who relies on this publication.

### **About Deloitte**

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see [www.deloitte.com/about](http://www.deloitte.com/about) to learn more about our global network of member firms.