



The most global and comprehensive marketing program ever initiated

Content Roadmap Work Session

May 29th 2013



Objectives



1. Start M2020 communication planning and partnerships
2. Program/Research Update
3. Key Milestones & Upcoming M2020 Events
4. Communication Channels & M2020 Content Review
5. Agree Next Steps



RESEARCH UPDATE

Executive Summary

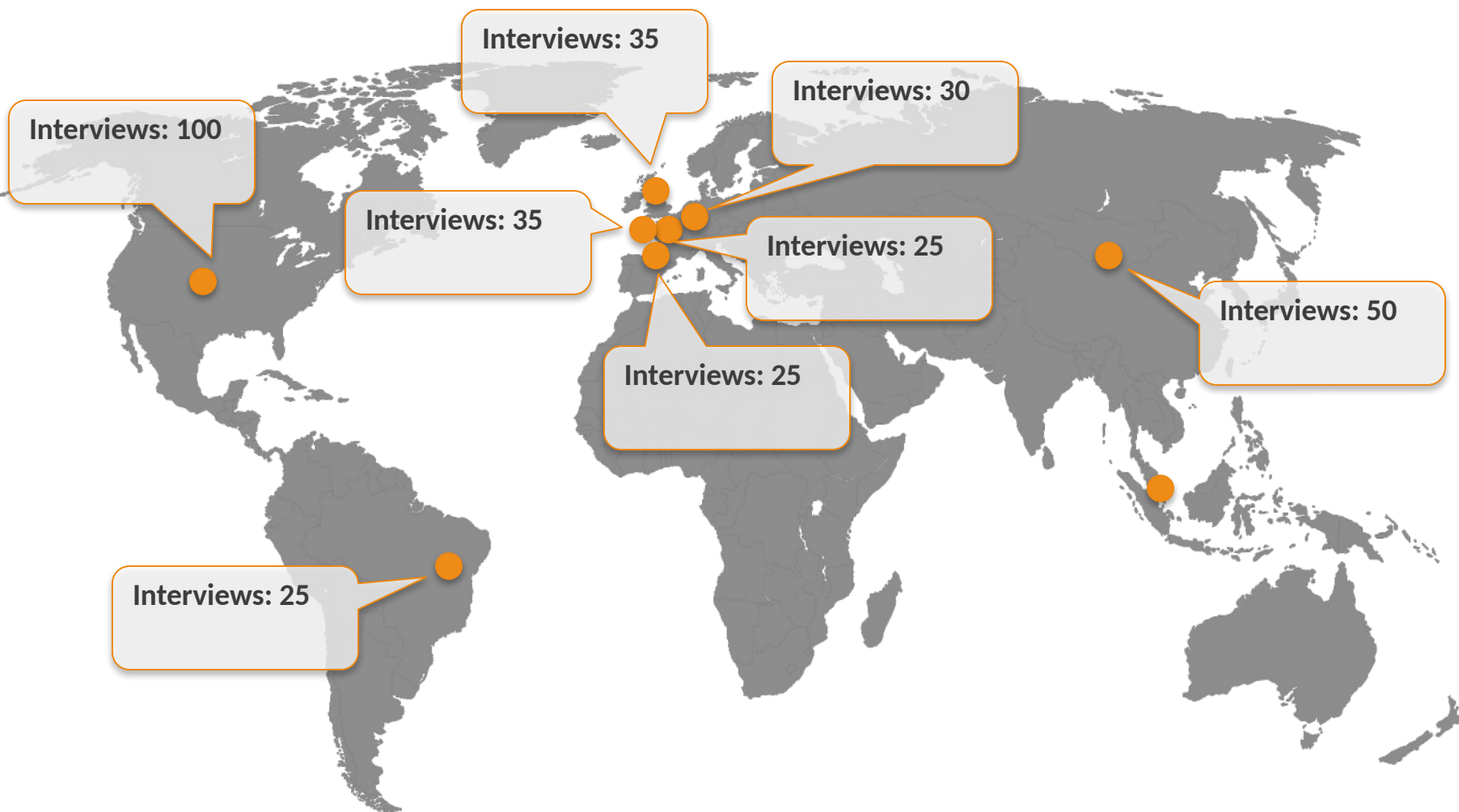


The largest and most comprehensive global marketing program ever conducted

- A total of 350 interviews will have been conducted by the end of June; in the US alone we now have over 100 contributing CMOs, CMO peers, and industry opinion leaders
- The quant survey was launched last week in the US; other markets soon to follow in May
- Some big markets (Germany/France/China) moving much slower than planned
- We expect the survey will be sent to ~200- 300K respondents globally
- EB research team will synthesize insights from Mid-May – Mid Aug



Approx. 350 CMOs, CEOs and KOF Contributing in Vision Interviews Expected



US CMO Participants



EffectiveBrands®

ANA

The Voice of British Advertisers
ISBA

WFA WORLD FEDERATION OF ADVERTISERS

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advertising
advertising

CANA 中国广告主协会
China Association of National Advertisers

Adobe

Global CEOs & Marketing Key Opinion Leaders

groupm *Leo Burnett* **nielsen**

BBDO **WPP**  **Wharton** **OmnicomGroup**
UNIVERSITY of PENNSYLVANIA

HERSHEY'S  **HAVAS** 
The Hershey Company WORLDWIDE Nutrition



Ogilvy & Mather



iab.

 **Miami Dade**
College


Allstate
You're in good hands.

WHOLE
FOODS
MARKET

4's

 **R/GA**



BBH

Ad
Council

IPG



H&R BLOCK®

TUCK

MEDIALINK

THE
HAYZLETT
GROUP

 **Kellogg**
School of Management

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China Association of National Advertisers


Adobe

US Quantitative Survey

Last week, This week and Next Week



I am excited to tell you about the **Marketing2020** study, by far the most comprehensive global marketing leadership initiative ever conducted. The cross-industry study, launched earlier this year, is designed to identify how marketing can best focus *strategy, structure, and capability* to support business growth. More than 250 CMOs worldwide have already contributed to this initiative through vision interviews.



We are now moving on to the quantitative portion of this study, which targets the entire marketing ecosystem. **You have been selected to contribute your opinions through an online survey.** Your answers will be kept in the strictest confidence and used in aggregate.

Please [click here](#) to take the survey.

Every respondent will have the chance to win one of the following prizes:



The M2020 Quant Survey



We currently have 2498 starters and 736 completes (30% completion rate)



What industry are you in?

- ☐ Media/Communications
- ☐ Real Estate
- ☐ Fast Moving Consumer Goods (FMCG)
- ☐ Energy/Utilities
- ☐ Telecom/TV/Internet
- ☐ Manufacturing
- ☐ Transportation/Logistics
- ☐ Retail
- ☐ Sports
- ☐ Healthcare
- ☐ Nonprofit/Association
- ☐ Business and financial services
- ☐ Computers/Software
- ☐ Consulting
- ☐ Education



Below you see the KPIs you selected in addition to revenue growth, and now please score your own organization's current performance versus

You can simply do that by moving the slider to the left or to the right (far left="much worse", far right="much better" than your direct peers/competitors)

Price premium versus competition



Revenue growth



Data and Analytics

Now, we want to show you a few statements about data and analytics.

With data and analytics we mean all kinds of data, analytics and consumer insights such as from internal databases, external data sources and insights resulting from market research, desk research or trend studies.

To what extent do you agree or disagree with the statements below?

Strongly disagree	Disagree	Neither agree, nor disagree	Agree	Strongly agree
In my organization, we have a structural approach in place to test new innovations as they progress through the funnel	The results of our Brand equity tracking are actionable	In my organization, we have a structural approach in place to track brand equity	We have right data and analytics available to measure marketing effectiveness	The results of our Innovation research are actionable



For the analyses we will follow a path based upon complexity of the analyses

Frequency Tables

May - June

- For all questions we will create frequency tables
- Objective is to show stats for all relevant topics in the questionnaire
- Release of this data will be in blocks of the questionnaire

Crossings

May-June-July

- In order to see differences we will do cross tabulations for all variables in the profiling section.
- Objective is to show differences between markets, industries, companies

Statistical Analyses

June - August

- Objective is to understand relations between blocks.
- Big question to answer is how marketing should organize itself for growth

KEY MILESTONES & UPCOMING M2020 EVENTS

Key Milestones

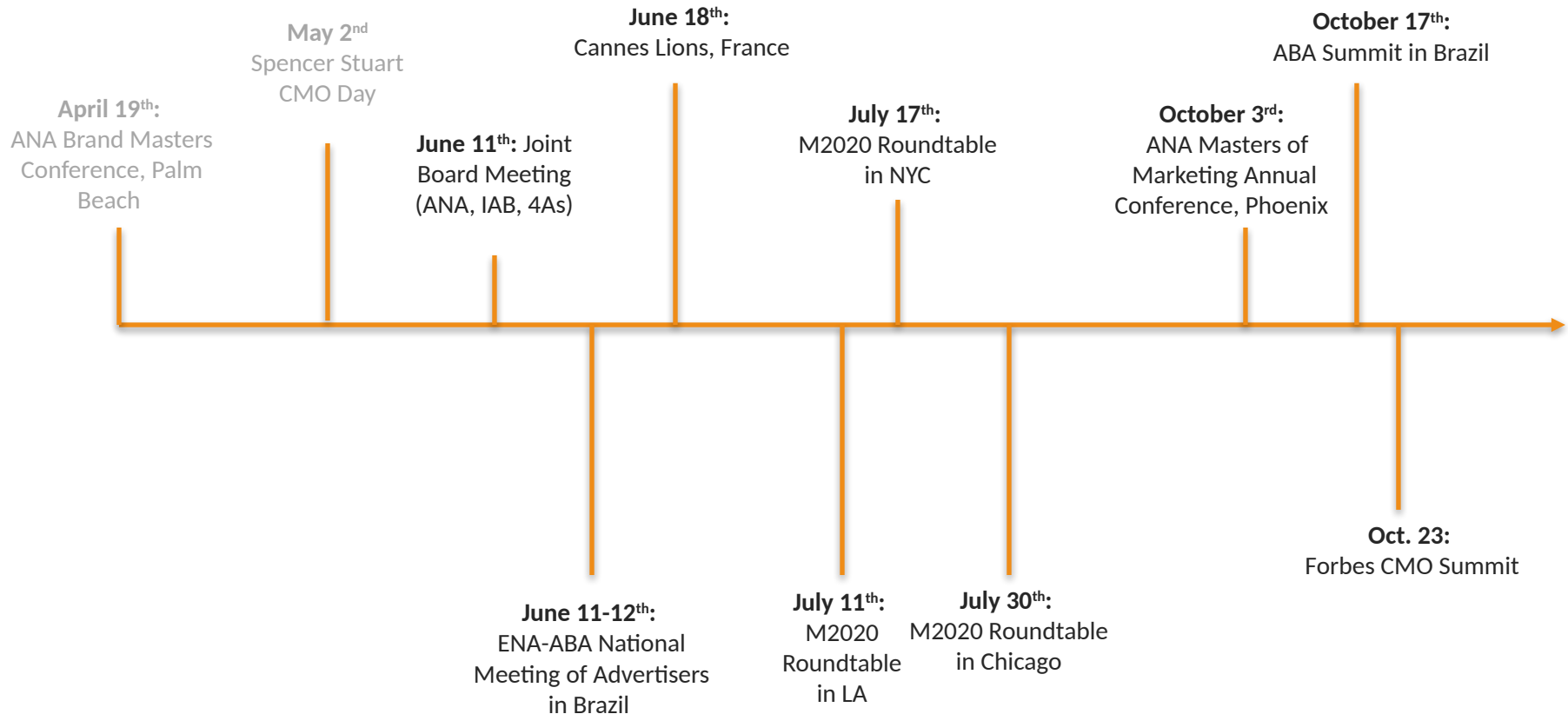


What will happen when in the US?

- May : Quantitative ANA member online survey
- June : First Top Level Findings - Hypothesis
- June : CMO Round Tables: *Implications of top level results*
- June : Joint ANA IAB AAAA Board Meetings – Top level findings review
- June : First Cannes Lions Marketing2020 CMO Summit
- July/Aug : Global Analysis - Report & Tool Development
- Sept : Publication & Presentation Production
- Oct : ANA Masters of Marketing full study conference debrief
- Nov : M2020 2014 detailed planning finalization



Key Upcoming M2020 Events



Note: Overview Not Exhaustive



Cannes Schedule

1. June 18 - 13.00 - Main Stage Presentation
2. June 18 - 15.30 - M2020 CMO round table
3. June 21 - 13.00 - Stengel CMO Training
4. All Week - Dedicated Company M2020 debriefs

M2020 Cannes Lions Seminar



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13:00 - 13:45 - TUESDAY 18 JUNE 2013

EffectiveBrands* EffectiveBrands is proud to present the Marketing2020 seminar about the future of brands, the marketing organisation, and how to evolve client agency collaboration to get the greatest creativity.

Marketing2020 is by far the most comprehensive marketing strategy, structure, and capability programme ever conducted with over 250 CMOs and marketing thought leaders contributing globally and over 300,000 marketers receiving invitations to participate in the online survey.

The Marketing2020 seminar highlights key findings of the Marketing2020 study and discusses the practical implications for marketing leaders and their agency partners. Who does what in the new order and how to tap into the latest and greatest creativity and still ensure consistency over time? How will the current model evolve to recognise new opportunities and requirements?

Marketing2020 is a unique partnership between EffectiveBrands, the WFA, Spencer Stuart, Forbes, MetrixLab, Adobe, the ANA, and seven other national advertising associations.

SPEAKERS

Speaker
Marc de Swaan Arons
 Co-founder
 EffectiveBrands

Speaker
Antonio Lucio
 Global Chief Brand Officer
 Visa

Speaker
Sucheta Govil
 Global Head of Marketing, Decorative
 Paints Business
 Akzo Nobel

EffectiveBrands*



The Voice
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SpencerStuart



Forbes*





Marketing2020 CMO Round Table

You are personally invited to join the CMOs of Unilever, IBM, VISA and Adobe for a discussion about the Marketing2020 study findings and the implications on the role of the CMO

Cannes JW Marriott, Tuesday June 18th 2013 - From 3.30 to 5 PM

Non-transferable invitation, limited capacity, please RSVP: lynn.baruh@marketing2020.org

Marketing2020: Aligning Marketing Strategy, Structure and Capability - www.marketing2020.org

COMMUNICATION CHANNELS & M2020 OUTPUT

Channel Types

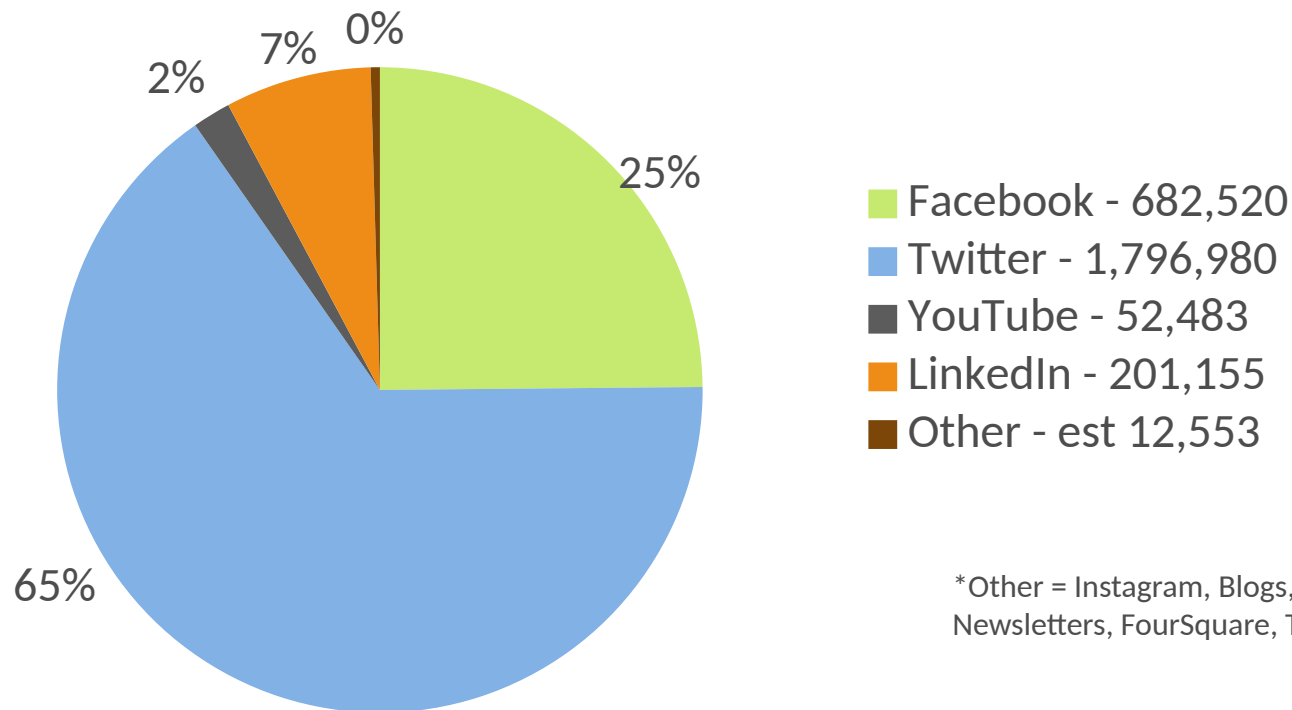


1. Personal Outreach (Email & Meetings)
2. CMO Round Tables
3. Conferences
4. Committee Meetings
5. Magazines
6. Press Releases
7. Websites, Blogs, Podcasts, Newsletters
8. Social Media
9. ...



Social Media Channels

Users



* Includes EffectiveBrands, WFA, SpencerStuart, Forbes, MetrixLAB, Adobe, ANA, ISBA, Union Des Annonceurs, Markenverband, UBA, BVA, ABA

Raw Materials



Expected #s

1. CMO Vision Interviews (200)
2. CEO and CMO Peer interviews (25)
3. Agency and Partner Leader interviews (50)
4. Completed Online Survey (2,500)
5. Organization Development Report reviews
6. CMO Reports reviews



Output Formats/Angles



1. Marketing2020 CMO profiles and Interviews
2. Statistics per question
3. Stats on the evolved role/influence of Marketing vs. 2006
4. Cross industry and cross geography benchmarking
5. Contrasting views of CMOs vs. their own teams, their Board peers and their agency partners
6. Characteristics of the Winning Marketing2020
 - Brand
 - Marketing Organization
 - Marketer
 - Marketing Leader (CMO)
7. White paper and bulletin per topic
8. Best Practice Case studies
9. Provoking Quotes
10. Marketing2020 Book



Output Formats



1. Daily M2020 and EB Twitter posts
2. Partner blogs and twitter feeds
3. Daily Provoking Quote
4. Weekly featured interview
5. Press releases
6. www.marketing2020.org
7. Forbes CMO Site
8. CMO Round Tables, Summits, Conference Presentations. In-company work sessions
9. Monthly White paper and 30 minute presentation deck per Key Topic
10. Monthly case study
11. Quarterly 15, 30 and 45 minute overall M2020 results decks
12. In Depth Academic (HBR?) Article
13. M2020 Book



June



CMO Round Table Inputs

Daily Quotes

Marketing2020 participants CMO and brand profiles

Key Marketing2020 CMO challenges

The increased influence of the CMO (vs. 2006)

Top Line Insights per topic

Leading CMO Interview – Unilever’s Keith Weed



July



CMO Round Table Inputs

Daily Quotes

How the M2020 CMO should lead – an agency perspective

Leading CMO Interview – Adobe's Anne Lewes

Case Study 1: Purposeful Positioning



August



First in-depth Views

Daily Quotes

CMO Partner Interview: Facebook's David Fischer



September



Creating Buzz

Daily Quotes

CMO Partner Interview: Bob Greenberg RG/A

Case Study: Nike Fuelband

Marketing2020 CMO Interview: Mark Pritchard



October



Full Blown Launch

1. Ready for full transparency
2. What 'new' roles to bring into the marketing teams
3. How do I motivate and integrate my Millennials
4. How do we better partner – internally and externally
5. Getting global right



November



Diving Deep – Month 1

Corporate Authenticity

Brand Societal Purpose

Brand Engagement

Big Data - One to One marketing - back with a vengeance



December



Diving Deep – Month 2

TBD



NEXT STEPS

Next Steps



- EB to create updated content overview and share with team
- Continue syntheses of preliminary insights
- Prepare Cannes & US based M2020 roundtables
- Launch quant study in other markets
- Prepare initial output (quotes, top line insights etc.)

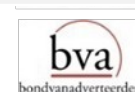


APPENDIX

M2020 Interviewees (CMOs, CMO Peers & KOLs)



#	Name	Company
1	360i	Bryan Wiener
2	AAAA	Nancy Hill
3	AB InBev / NYU	Chris Burggraeve
4	AdCouncil	Peggy Conlon
5	Adobe Systems	Ann Lewnes
6	AkzoNobel	Sucheta Govil
7	AllState	Lisa Cochrane
8	AllState	Sanjay Gupta
9	AmericanExpress	John Hayes
10	Bacardi	Andy Gibson
11	Bartle Bogle Hearty	Nick Kendall
12	BIC USA Inc.	Traci Gentry
13	Campbell Soup Company	Michael Senackerib
14	Capital One Financial	Peter Horst
15	Cargill Inc.	Paul Hillen
16	Charles Schwab	Jonathan Craig
17	Citibank	Elyssa Grey
18	Coca-Cola Company	Joe Tripodi
19	ConAgra Foods Inc.	Joan Chow
20	Deere & Company	Frances Emerson



M2020 Interviewees (CMOs, CMO Peers & KOLs)



#	Name	Company
21	Dell Inc.	Karen H. Quintos
22	Denny's	Frances Allen
23	Diageo / University of Texas	Robert Malcolm
24	Diageo NA	Peter McDonough
25	Dunkin Brands, Inc.	John Costello
26	Evol8tion, LLC	Joseph Jaffe
27	Facebook	David Fischer
28	Fidelity Investments	Jim Speros
29	Ford	Jim Farley
30	Fortune	Adam Lashinsky
31	General Electric	Beth Comstock
32	Georgia Pacific Consumer Business	Douwe Bergsma
33	Hallmark Cards Inc.	Lisa Macpherson
34	Harley-Davidson Inc.	Mark-Hans Richer
35	Havas Wolrdwide	David Jones
36	Hershey	Mike Wege
37	Home Depot, Inc.	Trish Mueller
38	IAB	Randall Rothenberg
39	IBM Corporation	Jon Iwata
40	IHG	Larry Light



M2020 Interviewees (CMOs, CMO Peers & KOLs)



#	Name	Company
41	Interbrand	Jez Frampton
42	ISI Group	Robert Ottenstein
43	Jamba Juice	Julie Washington
44	Jenn-Air	Brian Maynard
45	Johnson & Johnson	Kim Kadlec
46	JP Morgan Chase	Robert Tas
47	Kimberly-Clark Corporation	Clive Sirkin
48	Knouse Foods	Bob Fisher
49	Kraft Foods	Debra Berman
50	Liberty Mutual Group	Paul Alexander
51	Logitech	Ehtisham Rabbani
52	Marriott International, Inc.	Susan Thronson
53	MasterCard Worldwide	Michael Donnelly
54	McDonald's USA	Neil B. Golden
55	McKinsey	David Edelman
56	MDC Partner	Miles Nadal
57	Merck	Charlotte O. McKines
58	Microsoft	Allison Watson
59	MillerCoors LLC	Andrew J. England
60	Morgan Stanley	Michael Gallary



M2020 Interviewees (CMOs, CMO Peers & KOLs)



#	Name	Company
61	Motorola	Eduardo Conrado
62	Nestlé USA	Scott Remy
63	Nickelodeon	Pam Kaufman
64	Nintendo of America	Scott Moffitt
65	Novartis	Ernesto Levy
66	Obama for America	Teddy Goff
67	Pepsico	Simon Lowden
68	Pepsico China	Richard Lee
69	Pernod-Ricard	Martin Riley
70	Petco	Elisabeth Charles
71	Philadelphia Museum of Art	Jennifer Faure Francis
72	Pop Sugar	Jodi Lipe
73	Procter&Gamble	Marc Pritchard
74	Quaker	Gannon Jones
75	R/GA	Bob Greenberg
76	SAP	Jonathan D. Becher
77	SEI	Mark H. Samuels
78	Seventh Generation	John Replogle
79	Seventh Generation	Joey Bergstein
80	Siemens Corporation	Bill Stabile



M2020 Interviewees (CMOs, CMO Peers & KOLs)



#	Name	Company
81	Sony Mobile Communications	Steve Walker
82	Stroz Friedberg	Emma van Rooyen
83	Sun Products Corp.	Ed Vlacich
84	Target Corporation	Jeff Jones
85	The Hayzlett Group	Jeffrey Hayzlett
86	The Jim Stengel Company	Jim Stengel
87	The Scotts Company	Patti Ziegler
88	The Tuck School of Business	Kevin Lane Keller
89	The Wharton School of Business	Jerry (Yoram) Wind
90	Twitter	Adam Bain
91	UCLA	Sanjay Sood
92	Unilever	Keith Weed
93	Unilever	Simon Clift
94	United States Postal Service	Nagisa Manabe
95	Visa Inc.	Antonio Lucio
96	Walmart Stores, Inc.	Stephen F. Quinn
97	WPP	Martin Sorrell
98	Wrigley	Martin Schlatter
99	Xerox	Christa Carone



WFA Channels

- ❑ LinkedIn Followers – 208
- ❑ YouTube Subscribers – 43
- ❑ SlideShare Followers – 79



Effective Brands Channels

- ❑ Facebook Community – 66
- ❑ Twitter Followers – 619
- ❑ YouTube Subscribers – 9
- ❑ LinkedIn Contacts – 500+



ISBA Channels

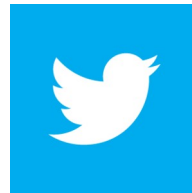


- ❑ Twitter Followers – 1,726
- ❑ LinkedIn Followers – 237
- ❑ Blog



UBA Channels

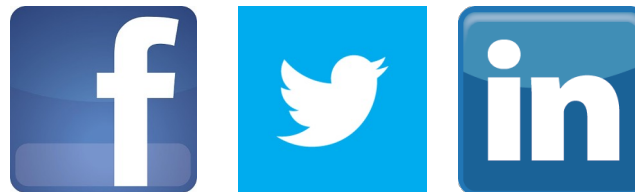
- ❑ Twitter Followers – 1,076
- ❑ LinkedIn Followers – 374
- ❑ YouTube Subscribers – 3



aba Channels



- ❑ Facebook Community – 1
- ❑ Twitter Followers – 530
- ❑ LinkedIn Followers – 142



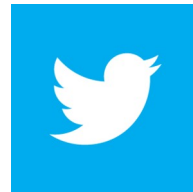
Markenverband



- ☐ Facebook – ?
- ☐ Twitter Followers – 25
- ☐ LinkedIn Followers – ?
- ☐ YouTube Subscribers – ?



MARKENVERBAND



Union des Annonceurs Channels

- ☐ Facebook Community – ?
- ☐ Twitter Followers – ?
- ☐ YouTube Subscribers – ?
- ☐ LinkedIn Followers – 229



MetrixLAB channels



- ❑ Facebook Community – 21
- ❑ Twitter Followers – 376
- ❑ YouTube Subscribers – 1
- ❑ LinkedIn Followers – 1,281



Online Consumer Research
Rotterdam London Hamburg Paris Madrid



Spencer Stuart Channels



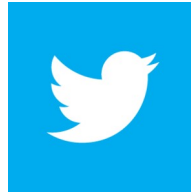
- ❑ Facebook Community – 657
- ❑ Twitter Followers – 2,571
- ❑ YouTube Subscribers – 0
- ❑ LinkedIn Followers – 18,685

SpencerStuart



Bva Channels

- ❑ Facebook Community – 0
- ❑ Twitter Followers –1,011
- ❑ YouTube Subscribers –0
- ❑ LinkedIn Members – 83



ANA Channels

- ❑ Facebook Community– 3,838
- ❑ Twitter Followers – 5,711
- ❑ YouTube Subscribers – 102
- ❑ LinkedIn Followers – 418
- ❑ Community Outreach
- ❑ Members



ADOBE Channels

- ❑ Facebook Community – 120, 000
- ❑ Twitter Followers – 174, 450
- ❑ YouTube Subscribers – 5,536
- ❑ LinkedIn Followers – 166, 488
- ❑ Digital Marketing Blog
- ❑ Instagram – 8,474



Forbes Channels



- ❑ Facebook Community – 556,000
- ❑ Twitter Followers – 1,610,878
- ❑ LinkedIn Followers – 13,077
- ❑ YouTube Subscribers – 46, 789
- ❑ Blogger
- ❑ FourSquare

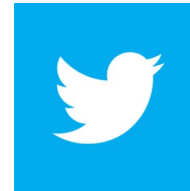
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Marketing2020 channels

❑ Facebook Community – 4

❑ Twitter Followers – 49



Thank you

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