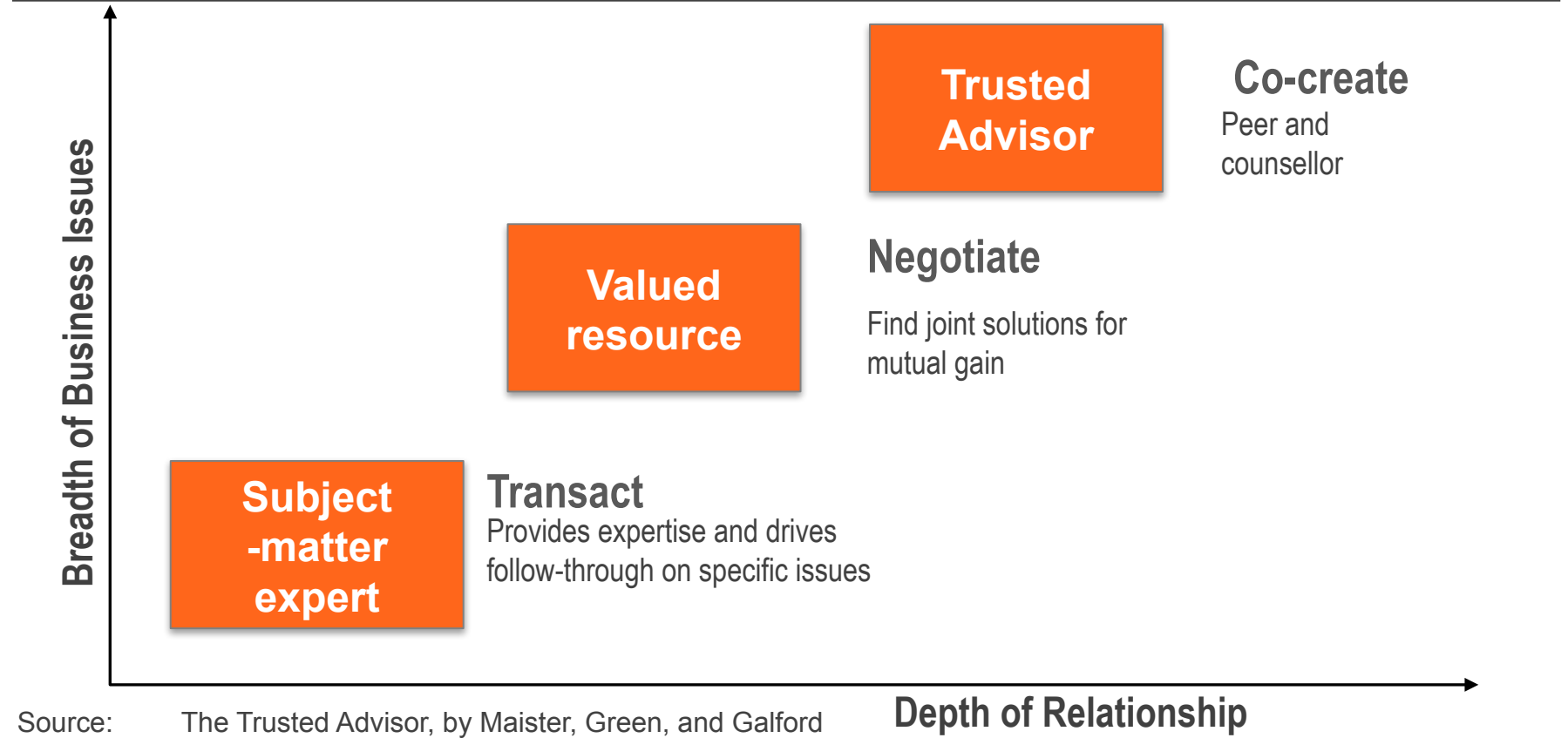


-
-
- *Beyond trusted advisor*

- *Vermeer All Partner meeting Feb 2-4 2016*
-
-
-
-
-
-
-

KANTAR Vermeer
-
-
-
-

Trusted Advisor



Framework for Building Trust

$$\text{Trust} = \frac{\text{Credibility} + \text{Reliability} + \text{Intimacy}}{\text{Self-orientation}}$$

Credibility (Words) = Content expertise plus presence

Reliability (Actions) = Consistent and dependable behavior

Intimacy (Emotions) = Willingness to show empathy and talk about difficult topics

Self-Orientation (Motives) = Degree of focus on one self and one's own agenda

Source: *The Trusted Advisor*, by Maister, Green, and Galford

Examples of Self-Oriented Behaviors

- A tendency to:
 - Relate the other person's stories to ourselves
 - Give answers too quickly
 - Finish sentences
 - Fill empty spaces in conversations
 - Appear clever, smart, knowledgeable
 - Recite qualifications
 - Use close-ended questions early in conversation
- An inability to provide a direct answer to a direct question
- An unwillingness to say "I don't know"
- Putting forth hypotheses or problem statements before fully hearing the client's hypotheses or problem statements
- Passive listening; a lack of visual and verbal cues that indicate the client is being heard

Source: *The Trusted Advisor*, by Maister, Green, and Galford

Excercise

How can you personally increase TRUST?

Share and discuss with your table

Share with the group

Framework for Creating Impact

$$\text{Impact} = \frac{\text{Insight} + \text{Resourcefulness} + \text{Accountability}}{\text{Fear}}$$

- **Insight** = Demonstration of novel thinking
- **Resourcefulness** = Ability to know what is needed and how to find it, in a constrained world
- **Accountability** = Acting “as if” the client’s situation was your own
- **Fear** = The degree to which one is immobilized to act when one knows one should

Examples of Fear-Driven Behaviors

- Failing to be clear and concise
- Avoiding of potential conflict
- Not asking questions to which you do not know the answer
- Using only your domain of expertise to view the client's situation
- Holding back from disclosing personal feelings, intuitions, and perspectives
- Projecting on to others uncertainties you have in yourself, resulting in arrogance and unsubstantiated judgment
- Competing with clients
- Shutting down, withdrawing
- Satisficing, doing the minimum needed to survive
- Reluctance to say / do something that will result in more work

Excercise

How can you personally increase IMPACT?

Share and discuss with your table

Share with the group

Listening exercise

Exercise 1:

Team up in pairs

A: You will talk about something you are passionate about for 90 seconds

B: You will look at the person but give NO response (no talking, no nodding, nothing)

Feedback from group

Exercise 2:

Team up in the same pairs

B: You will talk about something you are passionate about for 2 minutes

A: You will look at the person but give NO response (no talking, no nodding, nothing). After 60 seconds, I will raise my hand (facilitator) and for the last 60 seconds you will be very disengaged: distracted by your phone, scratching your head, looking out the window etc.

Feedback from the group

Listening

- Suspend your agenda
- Be fully present
- Discover
- Verify



- Ask open questions;
why what who when where how

Role play - listening

Brief:

- Define which specific listening skill you want to practice
- Client to explain who he is playing (e.g. CMO Verizon)
- You work with the team but this is the first time you (finally) get to meet the CMO

After 2-3 minutes the facilitator will pause

- 🗉 Ask the person, “how is it going?”
- 🗉 Ask the client, how are you feeling?
- 🗉 Observers: any feedback for the person?

Feedback structure: Observation, Impact, Pauze, suggestion

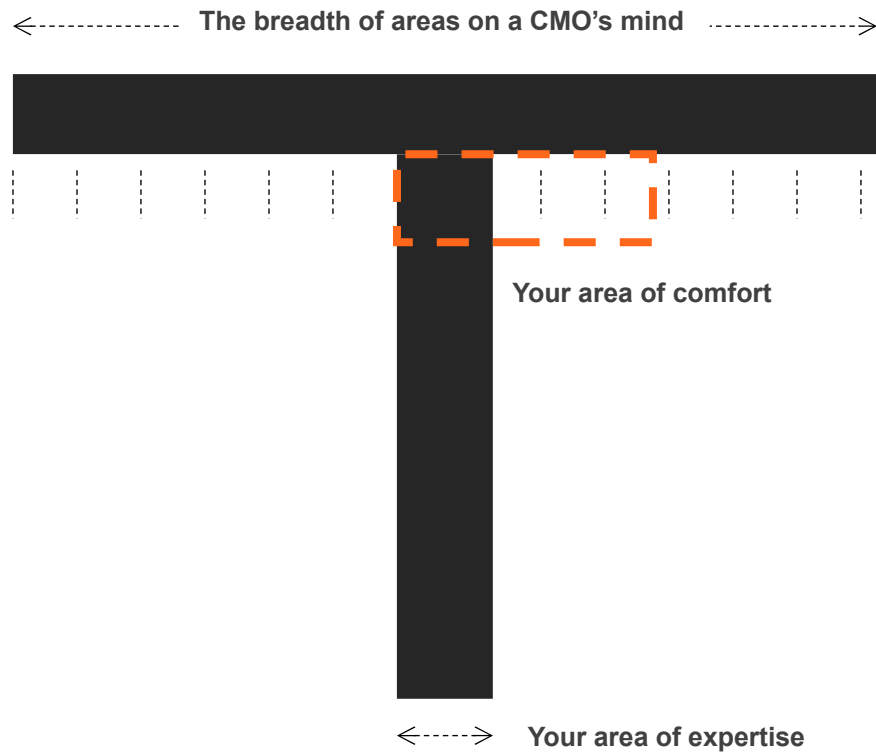
Continue or start from the beginning

- 🗉 This time the facilitator and observers might interrupt to give feedback

Discovery

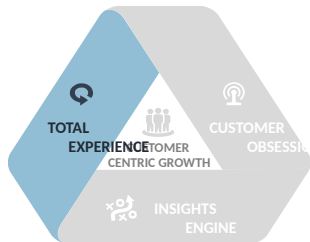
Intro to Marketing2020 & Insights2020

T-shape

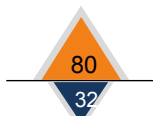


Insights 2020: Driving growth through customer-centricity

1. Purpose-led
2. Data driven customization
3. Touch point consistency



Link everything to a clear brand purpose



Creating experiences based on data driven insights



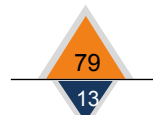
I&A to drive consistency across all touch points



4. Embraced by all
4. Leadership priority
4. Collaboration
4. Experimentation



Customer centricity is fully embraced by all functions



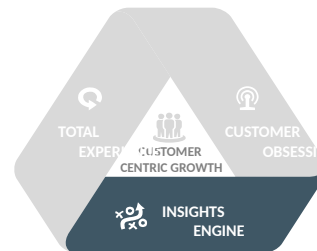
Customer centricity is a top priority for leaders



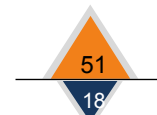
Embracing risk and experimentation



8. Leading role of I&A
8. Unlocking the power of data
8. Critical capabilities



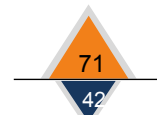
I&A leading the business



Linking data sources to distil insights



Hiring “wholebrain” people



PulseCheck2020™ Focus Areas



1

Big Insights

- Customer-centricity, Role and mindset of Insights and analytics , Customer journey, Segmentation

2

Purposeful Positioning

- Clarity of positioning, Societally-purposeful, Consistency of positioning

3

Total Experience

- Experience beyond functional benefits, Consistency across touchpoints and digital,

4

Connect

- Collaboration across functions and geographies,, Interdependence and trust , Understanding of local market reality , Influence of marketing on the business

5

Inspire

- Brand pride, Employee engagement around purpose

6

Focus

- Clarity and alignment around growth strategy, Understanding of marketing ROI, Alignment of KPIs and incentives with performance and customer satisfaction

7

Organize

- Talent to win, Organizational agility, Clarity on roles and responsibilities, Risk and experimentation mindset

8

Build

- Capabilities, tools and training for success, Senior management understanding of digital

Top 10 Killer Questions

10 Killer Questions about Marketing and Insight Strategy, Structure and Capability

1. Is the consumer/customer taken into account in all key business decisions?
2. How do you identify growth opportunities? Is your segmentation and portfolio strategy actionable?
3. Do you engage all your employees around the brand purpose?
4. Do you deliver a total experience true to the brand purpose?
5. Are you able to maintain brand consistency as you go digital?
6. Do your geographical and functional teams collaborate effectively?
7. Is there sufficient understanding of the value (ROI) that marketing programs bring the business?
8. Is your organization agile enough to respond to market changes?
9. To what extent does your organization embrace risk and experimentation?
10. Do your people have the right tools & capabilities to do their job well?

PulseCheck2020 Questions

INSIGHTS

1. **Is the voice of the customer taken into account in all key business decisions?**
2. Is customer centricity fully embraced by all functions and leaders across the organization?
3. Do you have the correct data and analytics?
4. Do you fully understand the customer journey from start to finish?
5. **Is your segmentation actionable? Does it identify growth opportunities?**
6. Do you feel your organization fully utilize the potential of Insights & Analytics?
7. Do the Insights & Analytics teams take a sufficient business-mindset when making recommendations?
8. Can the Insights & Analytics teams come with whole-brain, creative solutions and tell inspiring stories?

PURPOSE

9. Does your brand have a clear positioning?
9. Is your brand positioning societally purposeful?
9. What inspires *you* personally about your brand purpose?
9. **Do you engage all your employees around the brand purpose?**
9. Is the brand positioning consistent globally?

TOTAL EXPERIENCE

14. Is your organization focused on all the interactions customers have with your brand?
14. **Do you deliver a total experience true to the brand purpose?**
14. Is the brand experience consistent across all touch points?
14. **Are you able to maintain brand consistency as you go digital?**
14. Do you create your customer experiences based on data-driven insights?

CONNECT

19. Do all markets & functions understand the brand strategy?
19. **Do your geographical and functional teams collaborate effectively?**
19. Do global teams sufficiently understand the local market reality?

INSPIRE

22. Are your people proud of the brand purpose?

FOCUS

23. Do you have a winning growth strategy and is it well understood?
23. Are all key stakeholders aligned and supportive of the growth strategy?
23. **Is there sufficient understanding of the value (ROI) that marketing programs bring the business?**

ORGANIZE

26. Are individual KPI's linked to the overall business performance?
26. Are your incentives based on specific customer related KPI's (e.g. NPS)?
26. **Is your organization agile enough to respond to market changes?**

BUILD

29. Do you have the right people to win?
29. **To what extent does your organization embrace risk and experimentation?**
29. Is it clear where organizational responsibilities start and end?
29. Where, and at what level, does Insights & Analytics report into within your organization?
29. **Do your people have the right tools & capabilities to do their job well?**
29. Does your senior leadership sufficiently understand digital, mobile and social?

Role play - discovery

Brief:

- Define what top of the T-shape area are you are least comfortable with and you want to practice
- Client to explain who he is playing (e.g. CMO Verizon)
- You work with the team but this is the first time you (finally) get to meet the CMO

After 2-3 minutes the facilitator will pause

- 🗉 Ask the person, “how is it going?”
- 🗉 Ask the client, how are you feeling?
- 🗉 Observers: any feedback for the person?

Feedback structure: Observation, Impact, Pauze, suggestion

Continue or start from the beginning

- 🗉 This time the facilitator and observers might interrupt to give feedback

Next steps

Driving Vermeer Reputation and Business Growth (3 months to 3 years)

M2020 and I2020 Awareness & Understanding

Articles & Interviews & Videos & Downloads

(Partner) Conferences Round Tables Events & Brochures

WPP/Kantar/MB/TNS/FC Intros

CMO/CMI client & prospect *elevated conversations*

PulseCheck2020

Brochure & Intro Deck

PulseCheck Project

- Quant (20) & Quant (200-1500)
- Expert Review & Benchmarking
- Best in Class Inspiration
- Alignment on Insights & Marketing Agenda



Programs of Work

PulseCheck2020

Do you feel that any important Marketing & Insights areas are missing in the full P2020 Questions list?

In what areas do you feel that we should offer PulseCheck2020 'Deep Dives' ?

What do you personally need to be *equiped for success* in engaging with clients around PulseCheck2020?

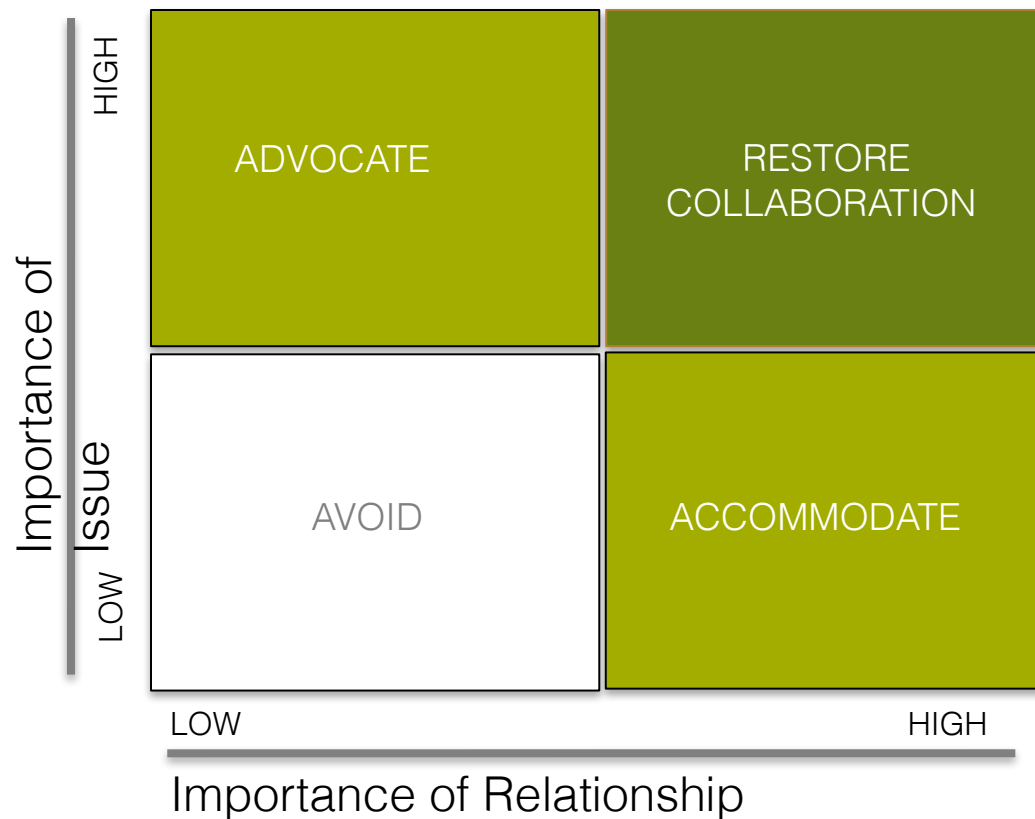
How many PulseChecks2020 should we close in the first half of 2016?

Please take the PulseCheck 2020 Mobile Survey by EOD Monday (10 min) and give any feedback to Tom Wilms

-
-
- *Appendix*
-
-
-
-
-
-

KANTAR Vermeer

Responses to Conflict



IMPACT Check-List

This check-list can be used to develop an impact plan for projects/programs

What kind of impact will this project have?	How should impact be assessed?	When should impact be measured? Do we need any baseline data?	To whom should impact be communicated?
			
☐ Save costs / create efficiencies 	☐ Client feedback 	☐ Proposal / pre-project (Create a baseline) 	☐ Project team (ZS) 
☐ Drive revenue / increase effectiveness 	☐ Qualitative ☐ Quantitative	☐ Mid-point, post-workshop or at "go live" of implementation 	☐ Client team 
☐ Influence Strategy 	☐ Quality of implementation 	☐ Project close 	☐ Senior management 
☐ Build a capability 	☐ Client adoption of recommendation 	☐ Post project assessment (e.g., 6 months post project) 	☐ Procurement 
☐ Help a person / team 	☐ Cost savings 		☐ Other client divisions / teams as a case study 
☐ Change how our clients customers act/feel 	☐ Revenue increase 		☐ Customer's customers (e.g., Patient groups etc.) 
☐ Feedback / tracking from client's customers 			