

## Market Leadership From CX to EX and back again

### Survival in the New Normal



# 4 minutes to dial this number

### The Clash

Harl





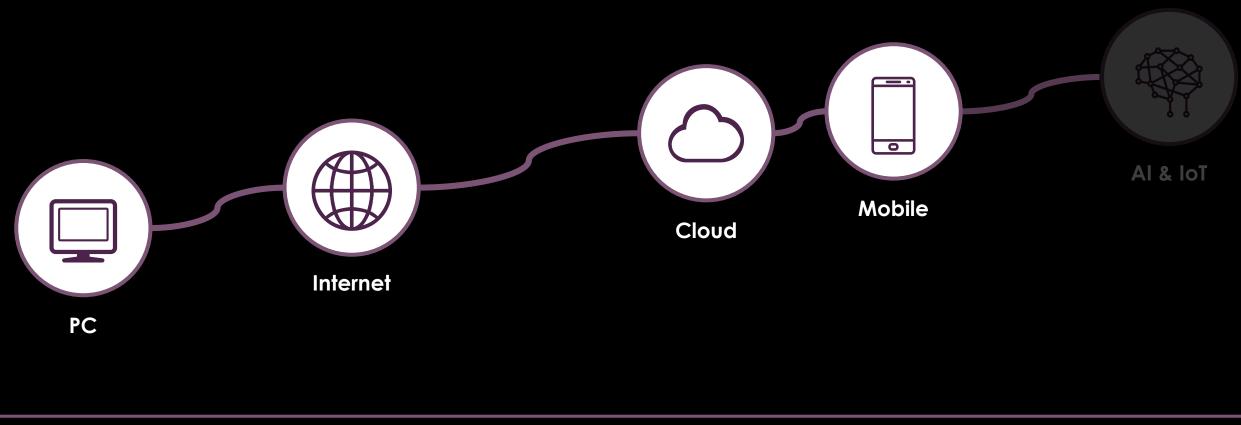


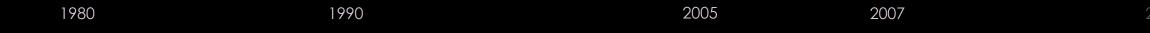




Software is eating the world.

















# 2018 26% of executives predict significant industry disruption in the next 3 years



# 2019 73% of executives predict significant industry disruption in the next 3 years



# SIGNIFICANT INDUSTRY DISRUPTION

### **NEW** TECHNOLOGIES

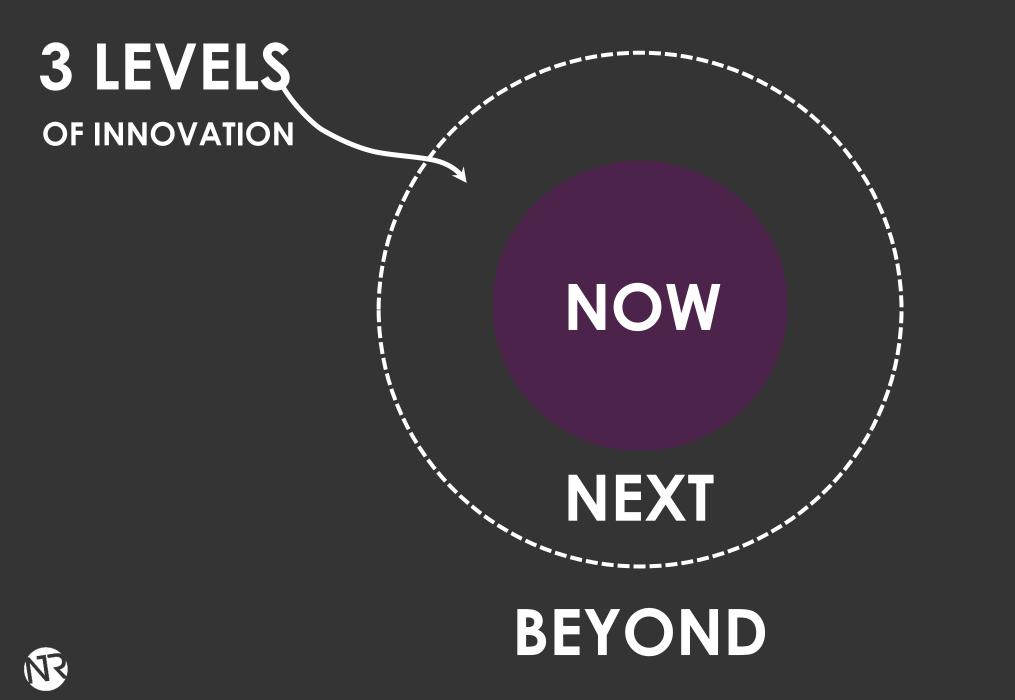
# COMPETITION

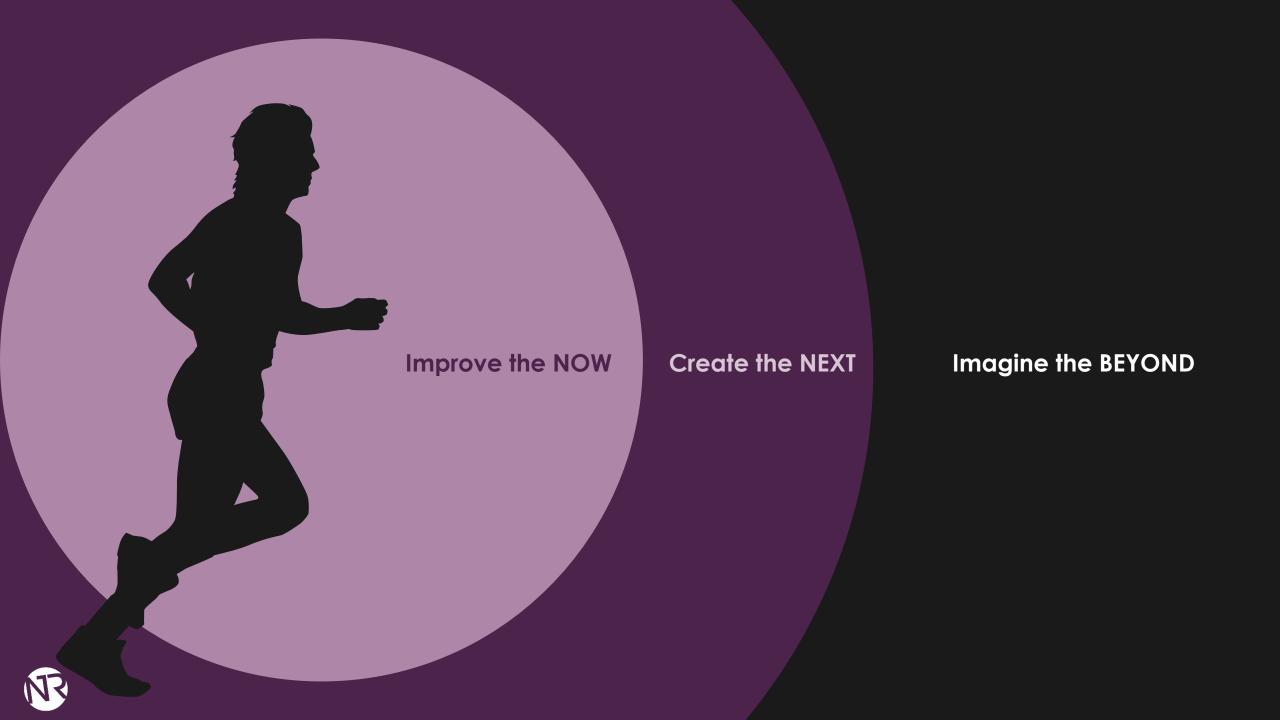
### HIGHER EXPECTATIONS











overcome the resistance to change

# formula of change



Vision of a positive future state



X

Resistance to change



Technology has changed companies



## Technology has changed humans





(1x)

×

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nformed Individualistic mpatient Influenced Intuitive



#### DIGITAL AROUND THE WORLD IN 2019

JAN 2019

THE ESSENTIAL HEADLINE DATA YOU NEED TO UNDERSTAND GLOBAL MOBILE, INTERNET, AND SOCIAL MEDIA USE





# Connectivity to the next billion users

Dear Santain HOW are you? I'm good. Here is what I want for Christmas. ANTTP://www.amazon.com 9P/product/BOO32HF60 Mrek=59\_hps\_bwl\_g2 iro3?pF\_rd\_mAT DKIKXODER Sepf.rd S=conter-38 of dr= 1XW4 421 H1K03Y 78MWQ & pErd 1= 1012 pf\_rd == 132.80 0154289512-1-16539

#### DIGITAL AROUND THE WORLD IN 2019

JAN 2019

THE ESSENTIAL HEADLINE DATA YOU NEED TO UNDERSTAND GLOBAL MOBILE, INTERNET, AND SOCIAL MEDIA USE





## Changing times

THEN



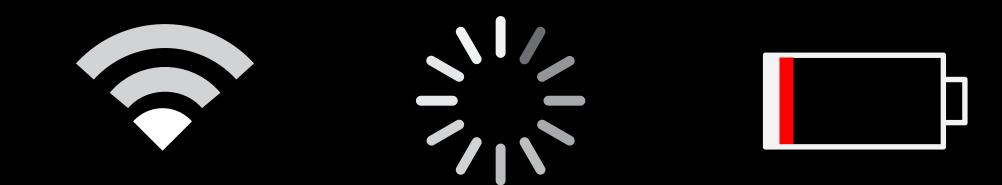






## Changing times

# 3 biggest fears of our generaion





# ACHTUNG ! SMOMBIE !

1) J







### A single room with a single book







## Customers are the center of their very own universe



# We put ourselves in the center of the picture







#### Multiple ME's

8













## amazongo

Welcome to Amazon Go and the world's most advanced shopping technology. No lines, no checkout just grab and go!



#### Do not steal time

-9

З





#### MOBILE SOCIAL MEDIA USERS OVER TIME

NUMBER OF MOBILE SOCIAL MEDIA USERS (IN MILLIONS), WITH YEAR-ON-YEAR CHANGE

JAN 2019



NR



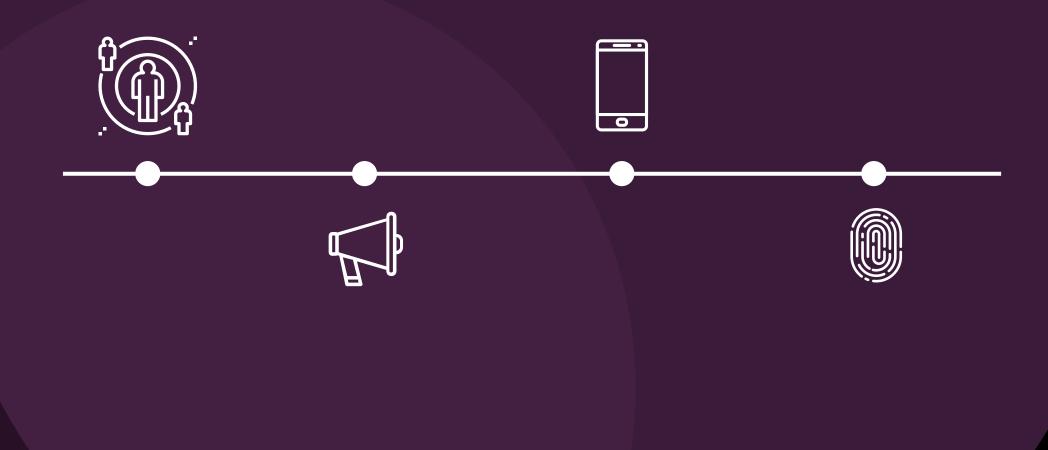
DO NOT BELIEVE COMPANIES TELL THE TRUTH IN ADS



## 78%

Trust peer recommendations

#### PERPETUAL CHANGE OF INFLUENCE

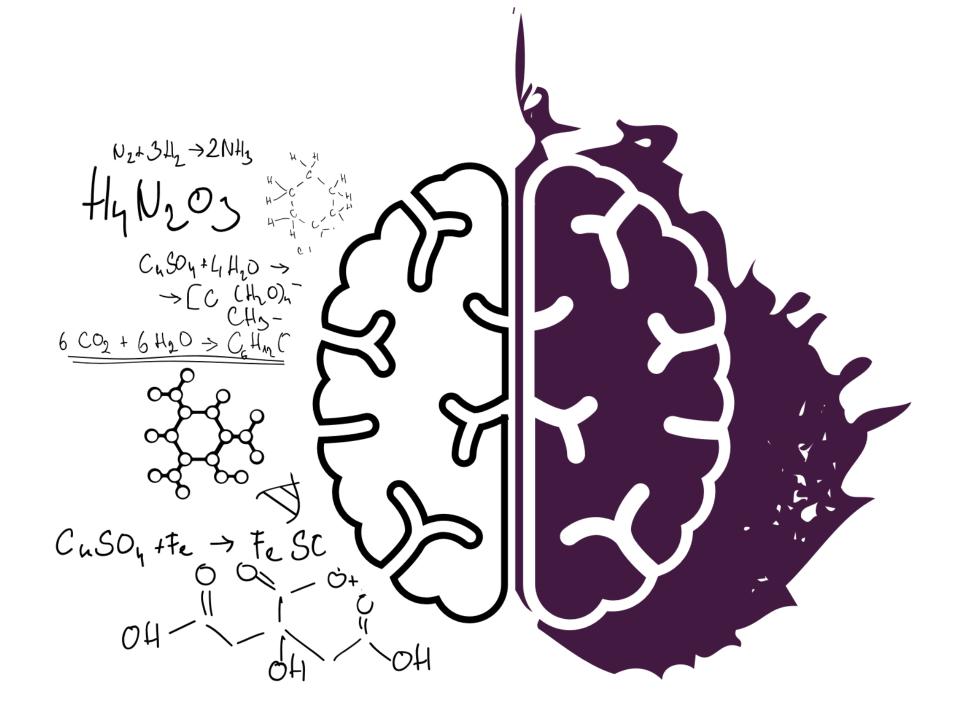


Traditional mass media campaigns are losing impact









NR





## FASTANDSLOW DANIEL

THE NEW YORK TIMES BESTSELLER

#### KAHNEMAN

WINNER OF THE NOBEL PRIZE IN ECONOMICS

"[A] masterpiece . . . This is one of the greatest and most engaging collections of 

R

## WE CAN **MAKE** OR BREAK A BRAND



#### DONT'T EXPECT LUGGAGE TO ARRIVE





We have a salad bar for some reason

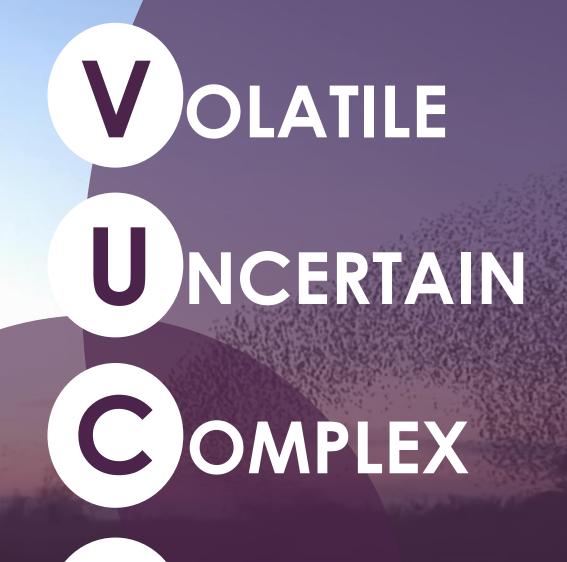
\$2000 facebook machines





nformed **Individualistic** mpatient Influenced Intuitive

We are the "MURMURATION"



AMBIGUOUS



NR

"The **rate of change** is not going to slow down anytime soon"



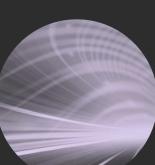
"We live in an age where the rate of change is colossal"





Peter Diamandis





# In the new normal Aquity is CRUCIAL



## Strategy becomes





#### WHAT CAN WE LEARN FROM DISRUPTORS?



### Uber Spotify Coursera



#### DON'T START WITH THE **PRODUCT.**

#### START WITH THE





We're not competitor obsessed, **we're customer obsessed**. We start with the customer and we work backwards.

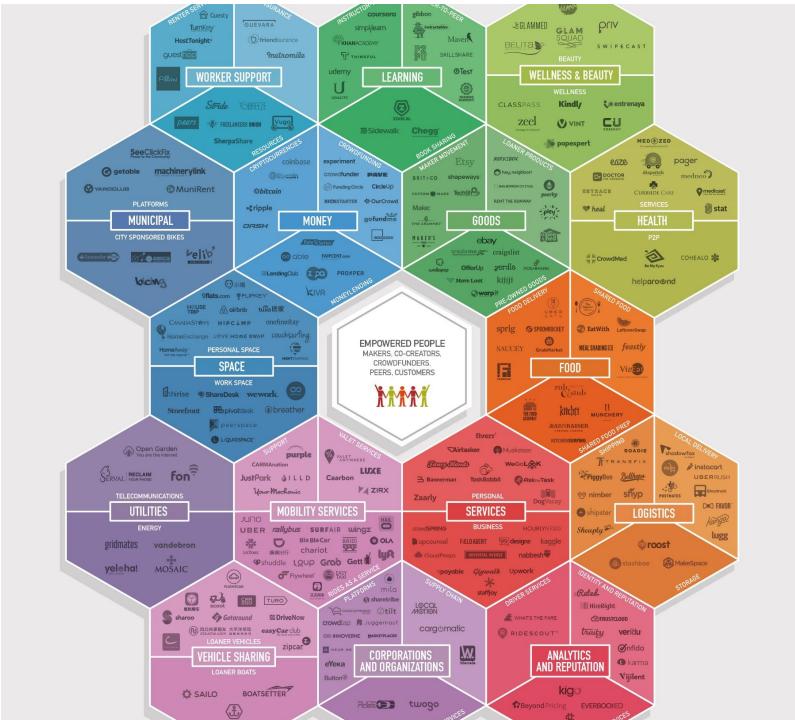
Jeff Bezos, CEO Amazon



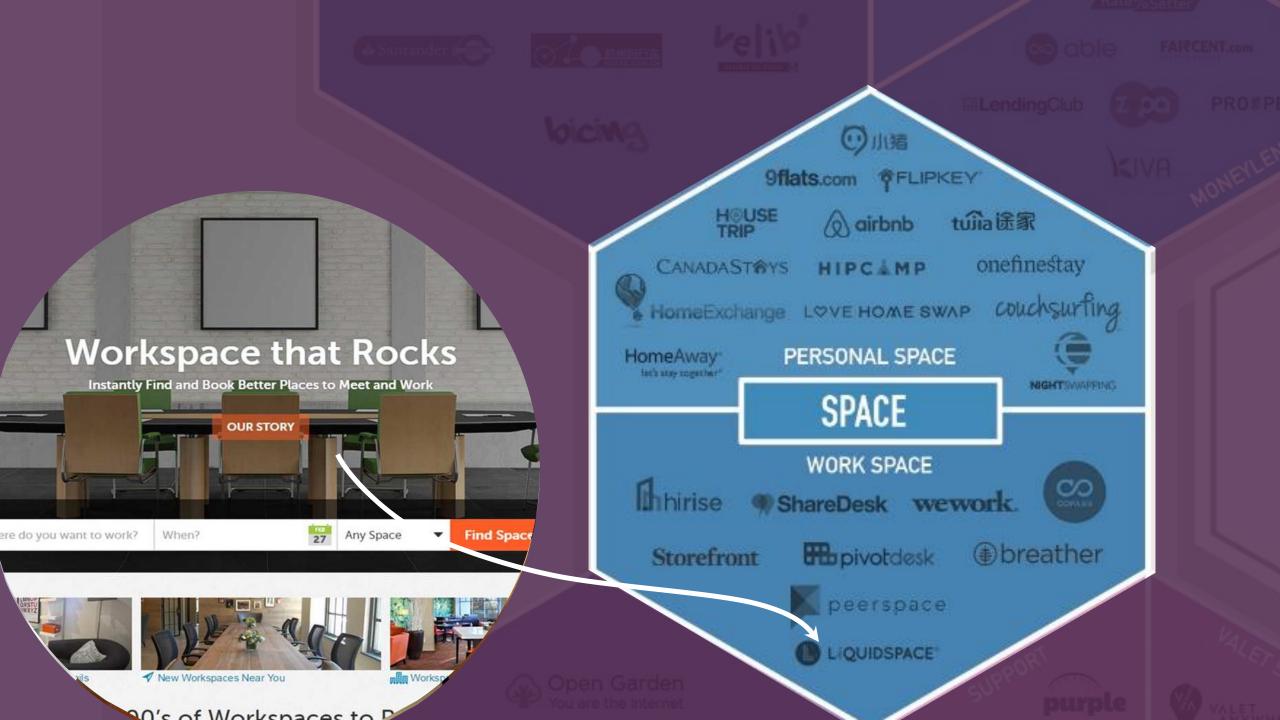
### From Products to

# Platforms









wyang ICompanies.com h 2016

# Learn on your schedule

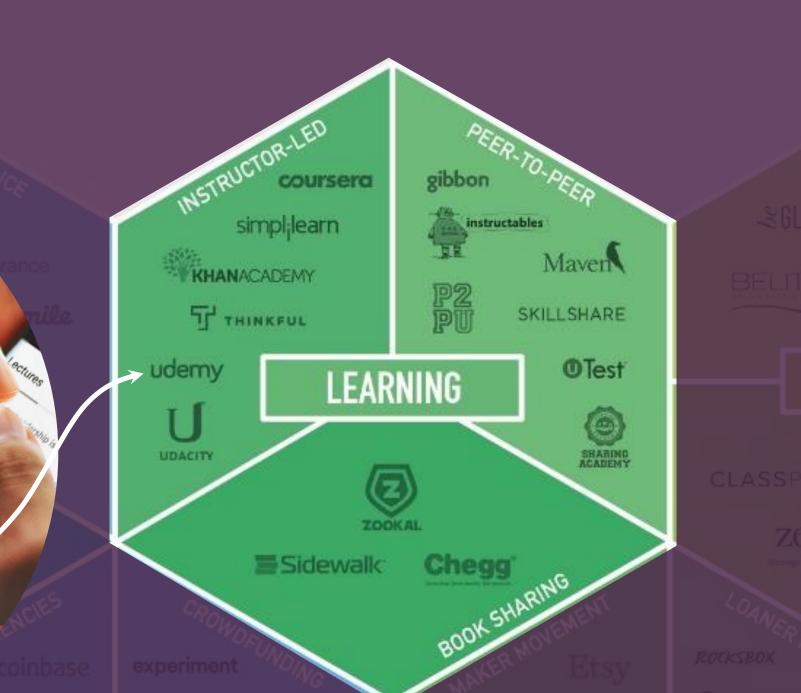
Study any topic, anytime. Explore thousands of courses starting at €10.99 each

What do you want to learn?

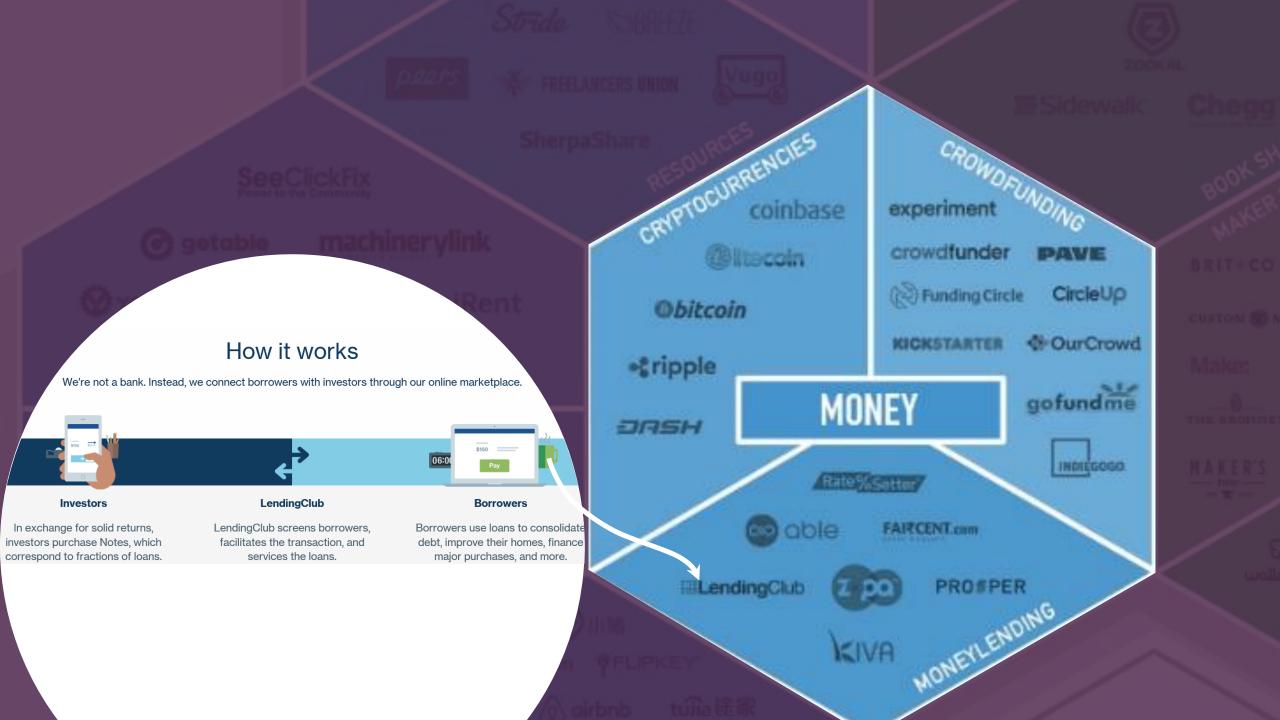
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**100,000 online courses** plore a variety of fresh **Expert instructio** Find the right instr

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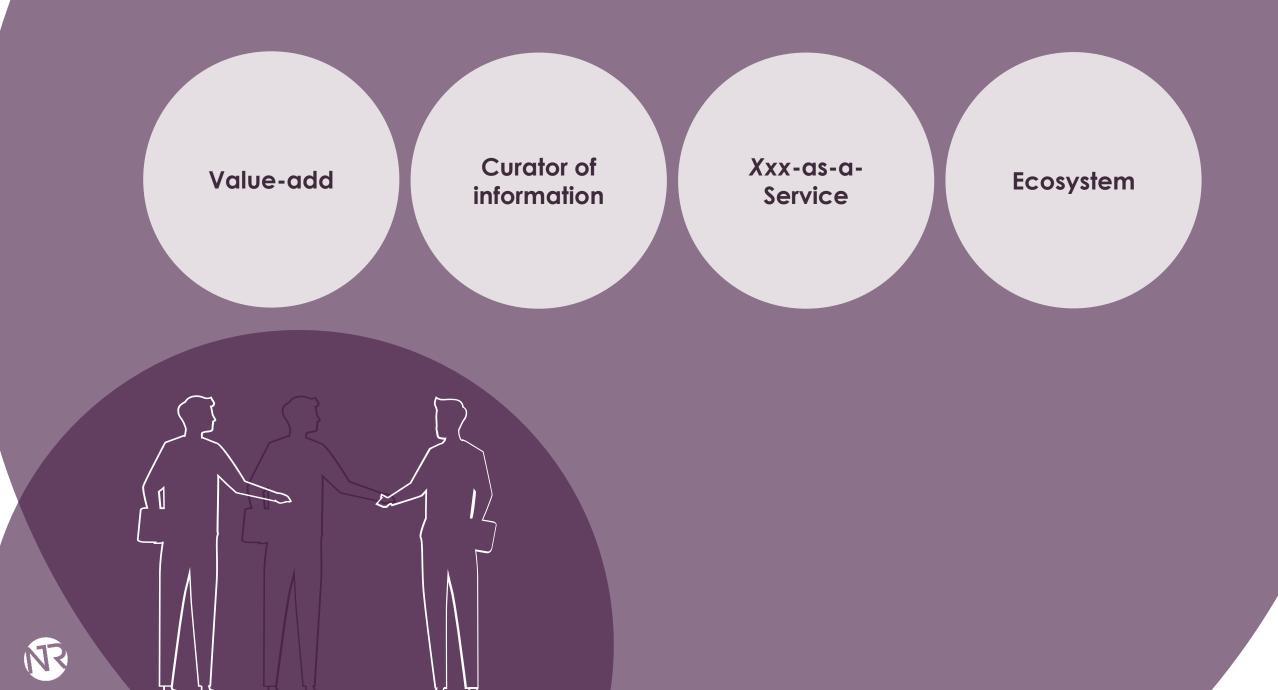


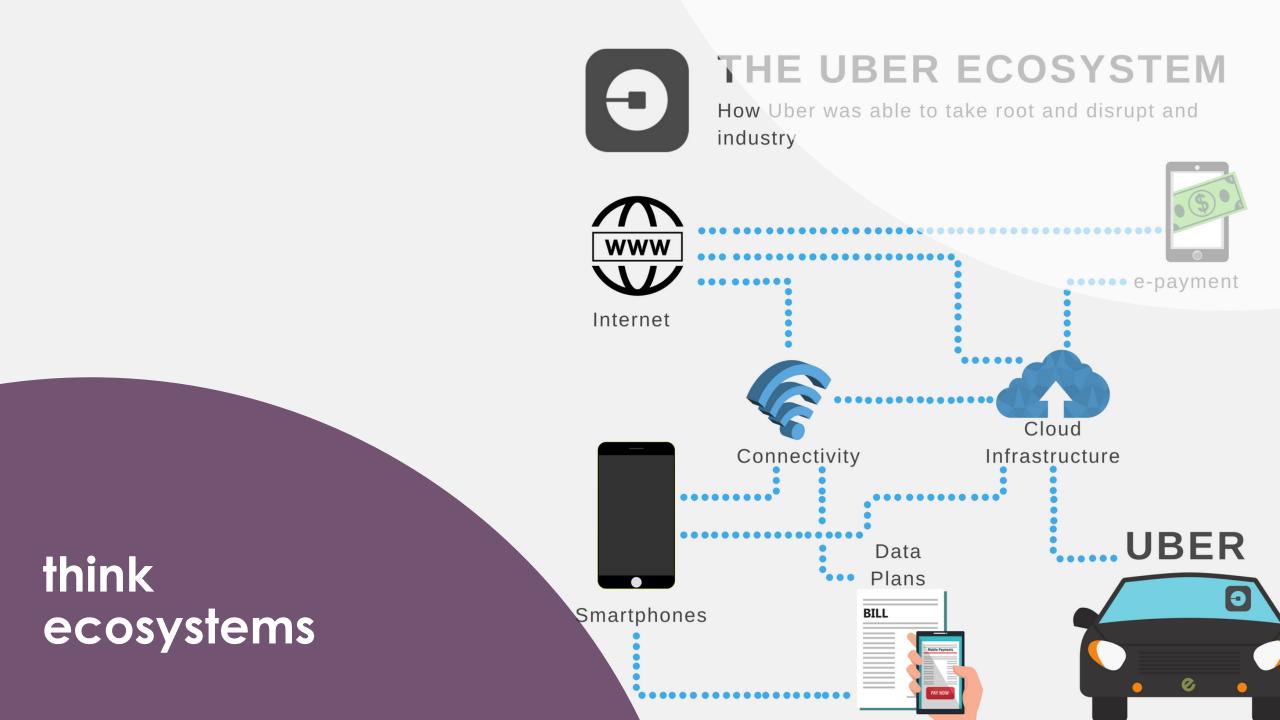


# Cut out the middle man









### Platform vs Ecosystem



"I sell books"



"I sell whatever I want"



Enabling retailers to create a personalized experience for each individual consumer across the globe



Global wholesale buyers

help

others

grow

44

If you want 10,000 new customers, you have to build a new warehouse, hire people... for me? 2 servers

#### DIDI becoming a fintech giant

◎ 滴滴共享汽车

00-

ecosystem

customer needs

red ocean

scale

action & implementation

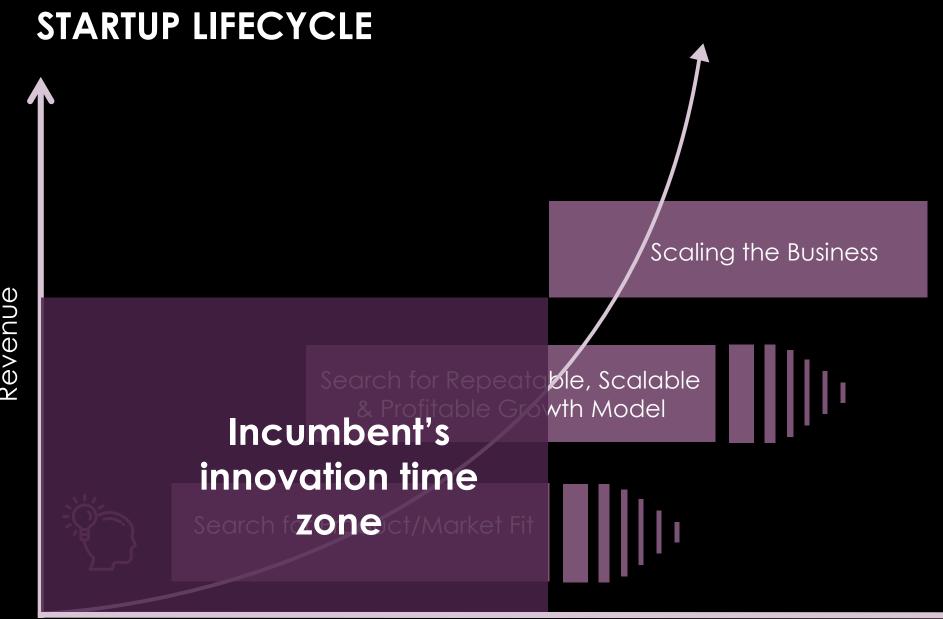
 $\leftrightarrow \text{ blue ocean}$  $\leftrightarrow \text{ branding}$ 

 $\leftrightarrow$  company needs

 $\leftrightarrow$  industries

↔ talk of focus & strategy

THINK LESS DO MORE ↔ THINK MORE DO LESS



Revenue



# THE BATTLE FOR THE CUSTOMER



### COMES FIRST.

# Customer Experience

hunkemöller

a customer's **PERCEPTION** of his interaction with **any part** of an organization

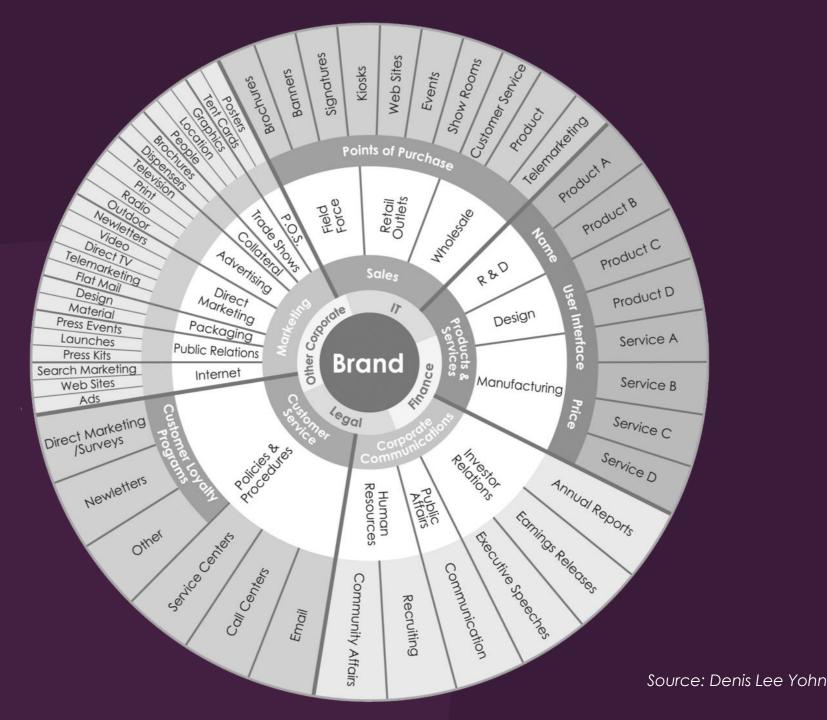
Influences **BEHAVIOUR** Builds **MEMORIES** 

### Interactions = Touchpoints



### **Perception = Reality**









# Customer

## in mind



# HUGE shock



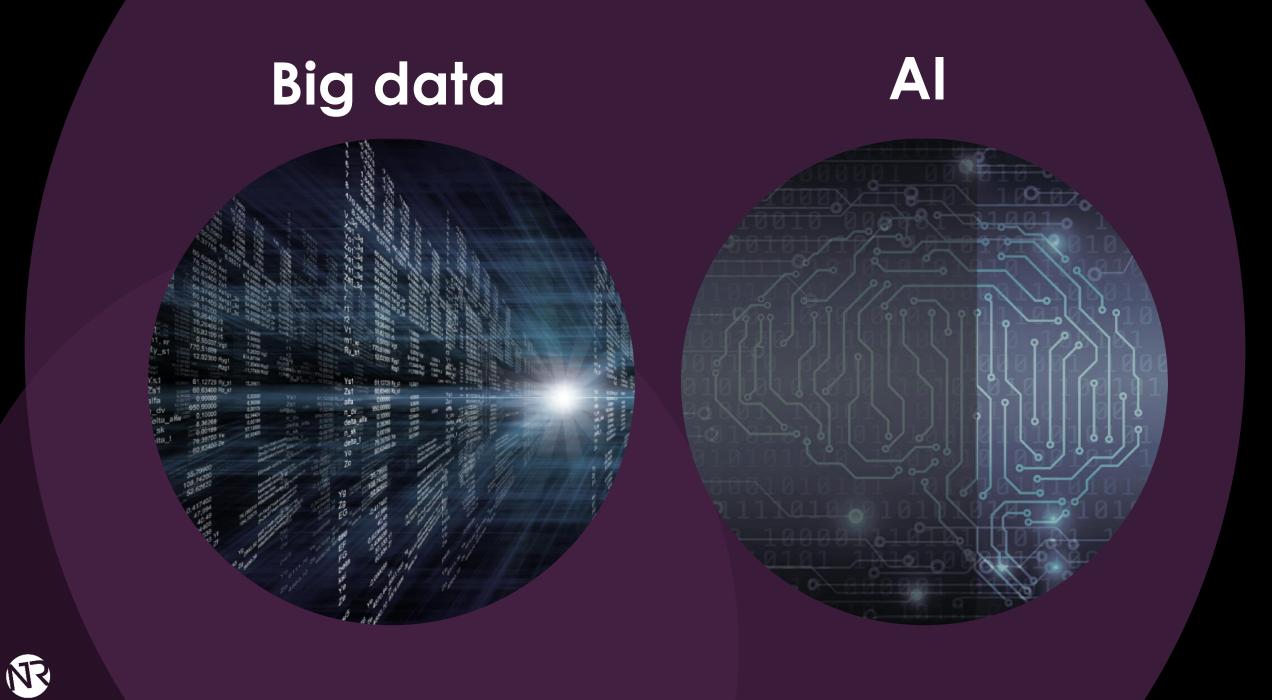
# 50% of the CX involves EMOTIONS

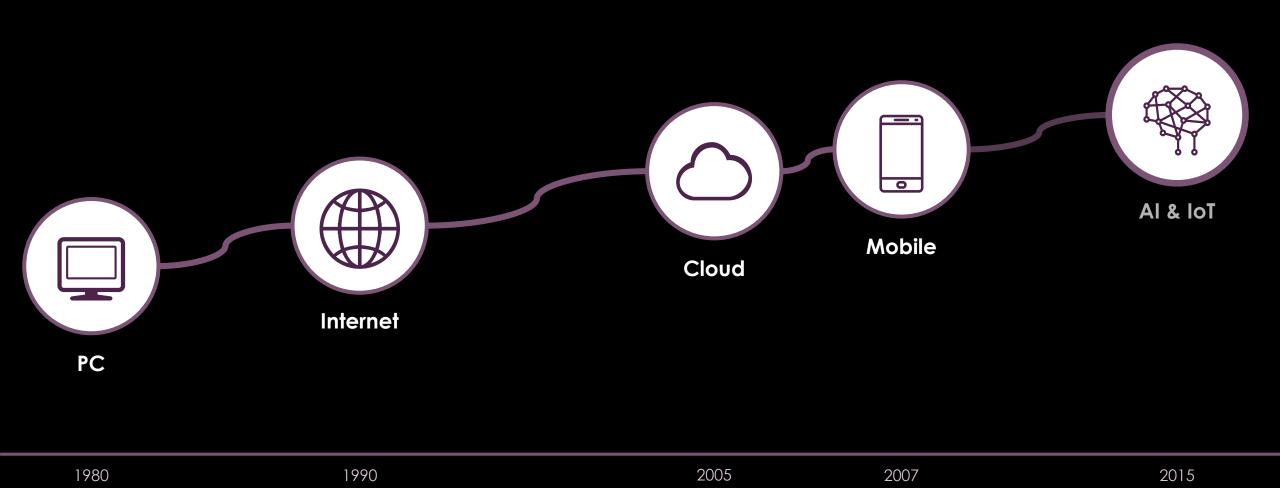


Take a look at **ALL** of the customer behaviour











If you don't have an AI strategy, you are going to die in the world that's coming.

- Devin Wenig, CEO eBay



## "Data is cheap but it's dumb."

-Peter Sondergaard SVP, Research, Gartner



"Companies will be valued not just on their big data, but on the **algorithms** that **turn that data into actions** and impact customers."

- The Arrival of Algorithmic Business, 2015

### Algorithms already influence



### Algorithms already influence





#### Analytics vs. Algorithms

-as 3 3 Fune 1

attributes

Langen

Contes a G F

HIGHLAN 66666

ler



### Analytics vs. Algorithms

Level of Intelligence



# Algorithms bring **PREDICTIONS**

ind.getAttribute("className"))
ind.fp.d.fitter.lD=function(a)(var b=a.replace(ba.a.getAttribute)
ind.fp.d.fitter.lD=function(a)(var b=a.replace(ba.a.getSelectorAll
ind.fp.d.fitter.lD=function(a)(var b=a.replace(ba.a.getSelectorAll)
ind.fp.d.fitter.lD=function(a)(ifter.lD=fp.d)(ifte

NR

Present



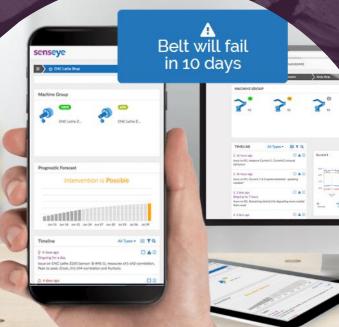


Diagnostics

NR

Sales

# Machines don't have to break.











#### More data

#### Even more Sales

#### Happier Customers

#### Smarter Algorithms

#### Smarter Products & Services



#### More data

#### Even more Sales

#### Happier Customers

#### Smarter Algorithms

#### Smarter Products & Services







#### "Al's Virtuous Cycle"

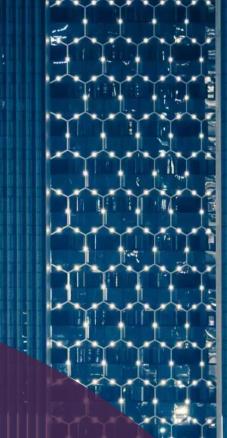




#### Monetize the data







# As little as 1% of industrial data is being used today



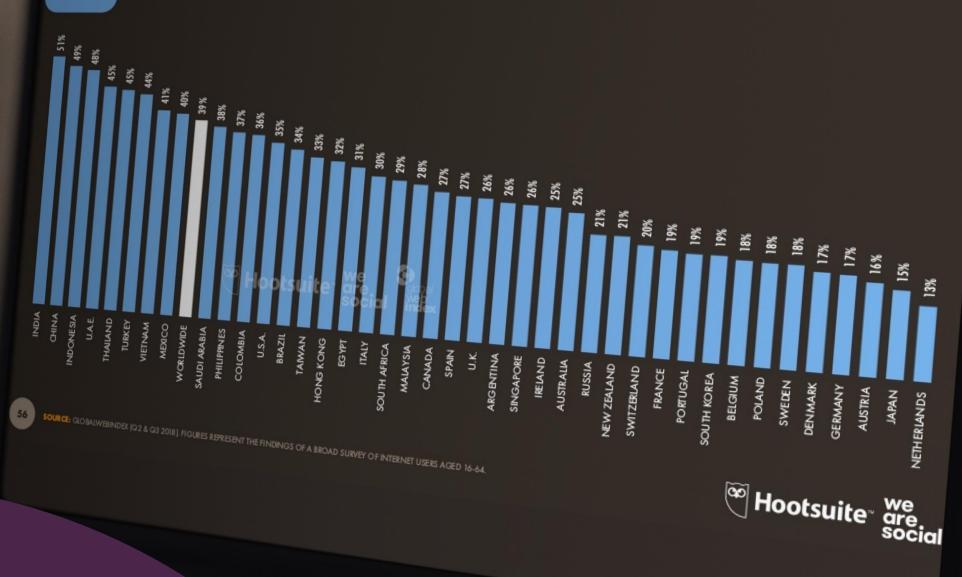
Source: mckinsey & company

# What sha Future?



#### USE OF VOICE SEARCH & VOICE COMMANDS

PERCENTAGE OF INTERNET USERS IN TOP ECONOMIES WHO REPORT USING VOICE-CONTROLLED FUNCTIONALITY (ANY DEVICE)



JAN 2019





# Web10Mobile3Voice1

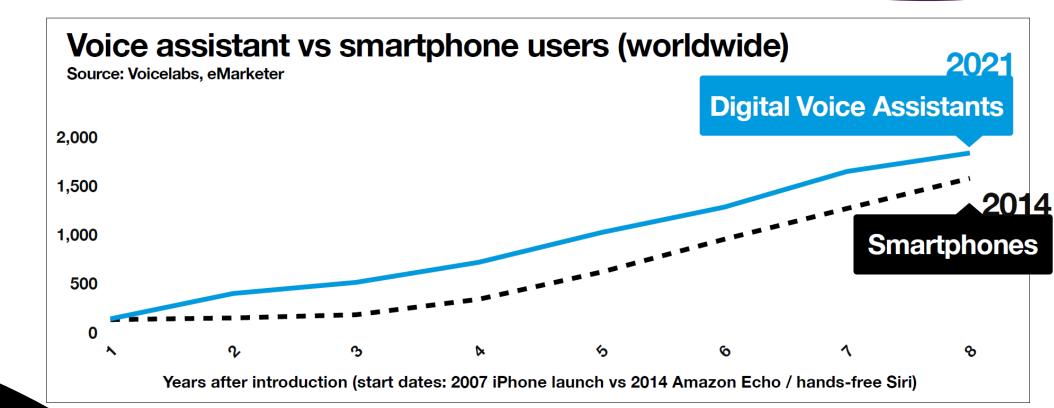
50% **VOICE** by 2020



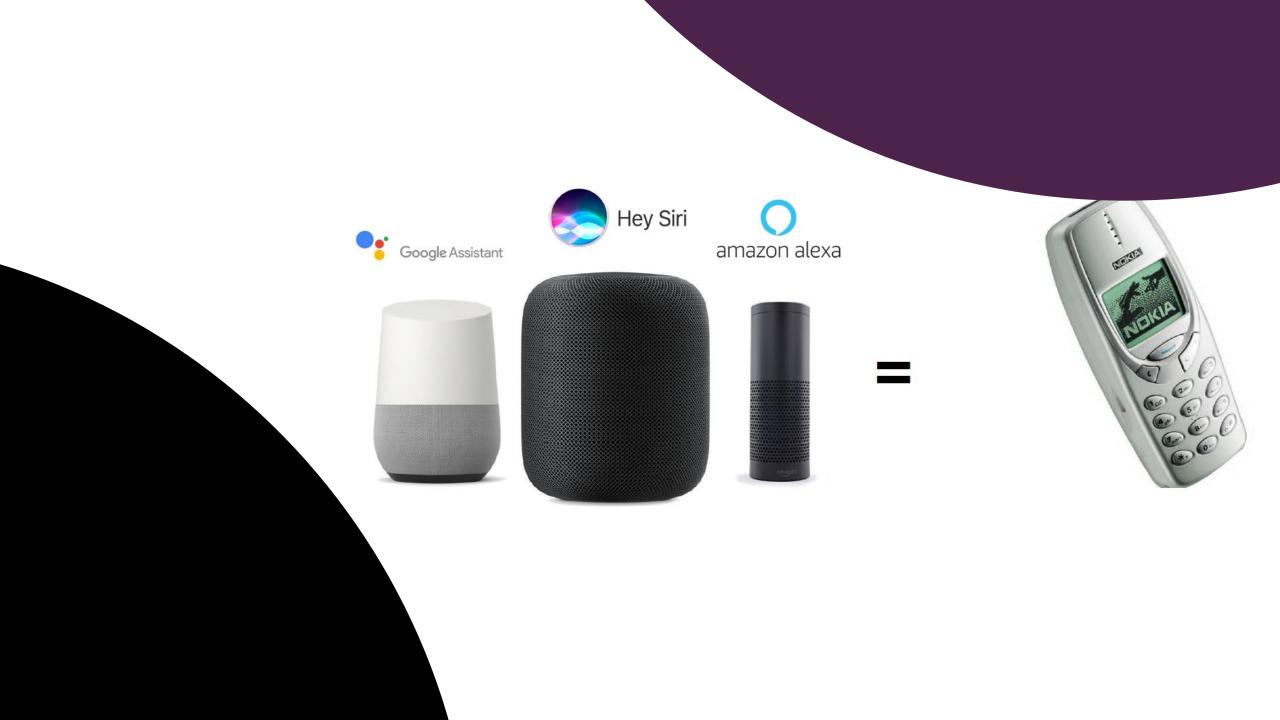
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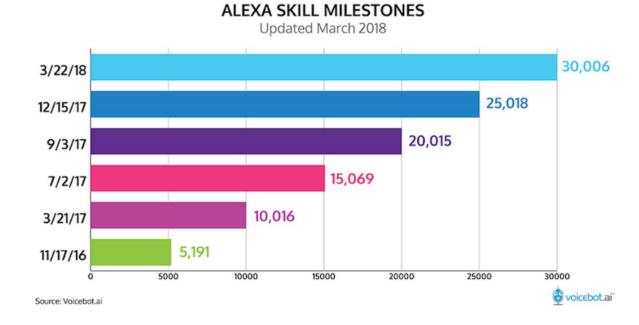






Outpacing smartphones





# Opportunity knocks!



amazon



NR

# BCI









If you think "going forward" it will move forward. If you want it to move to the right or to the left, it will move from the left or right.

# virtual reality

# augmented reality

7m

12m

\$5

16m

5

16m

37m

3m

10m

24m







# huge opportunities



nformed **Ondividualistic** () mpatient Influenced Intuitive

# The Customer

# expects extreme





#### Security





#### Security **Privacy**





## Blockchain

#### Blockchain



## Blockchain will establish TRUST

#### Blockchain's current state

# AIRBNB FACEBOOK NETSCAPE TCP/IP, HTTP, FTP INTERNET

# WE ARE HERE

BLOCKCHAIN

Security Privacy **Pricing** 









in business in sales in health in hospitality in manufacturing in education...

#### Personalized Shoes



#### Personalized Food



#### **Precision Medicine**



Precision Marketing 寺晖

**青**晖

青晖

THE VALUE OF PERSONALIZATION

#### Relevance x Timeliness x Integrity Personal Information x Effort



## CONVENIENCE IS THE NEW Loyaty



Frictionless
Cessible
Ubscription
echnology

oculus

#### Convenience augmented



**Prictionless** 

Alipay.com



• Europa League Live Scores • Liga NOS Live Scores • Products • metadate • set sending • braapOB • Inventory and eCommerce hosted and self-hosted solution • Parsed Json MHOIS • football live score • Open Broadcasting • Eredivisie Live Scores • Elevation • youtubeTOmp3 • Email Verifier App - Email Verif

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Email

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rictionless

Find and Connect to the World's Top APIs. See How

 ${f Q}$  ) Search for the API you need

For Developers For API Providers

Most Us	ed APIs	All Time   Today
Ģ	Pinterest         Add pins, follow and display options to your app         ● Healthy	3M 🔺
yelp	YelpAPI Access local businesses data from the Yelp database. ● Healthy ♠ serg.osipchuk ☆ 5	1M 🔺
andru	<ul> <li>Random Famous Quotes</li> <li>Get a random quote in JSON format. Current categories are: - famous</li> <li></li> <li>Healthy Andruxnet 24</li> </ul>	411K 🔺

Free Natural Language Pro... 100% free service including sentiment analysis, content extraction, an... ● Healthy ● loudelement ☆ 3

Add your API

#### Featured API

Add your API

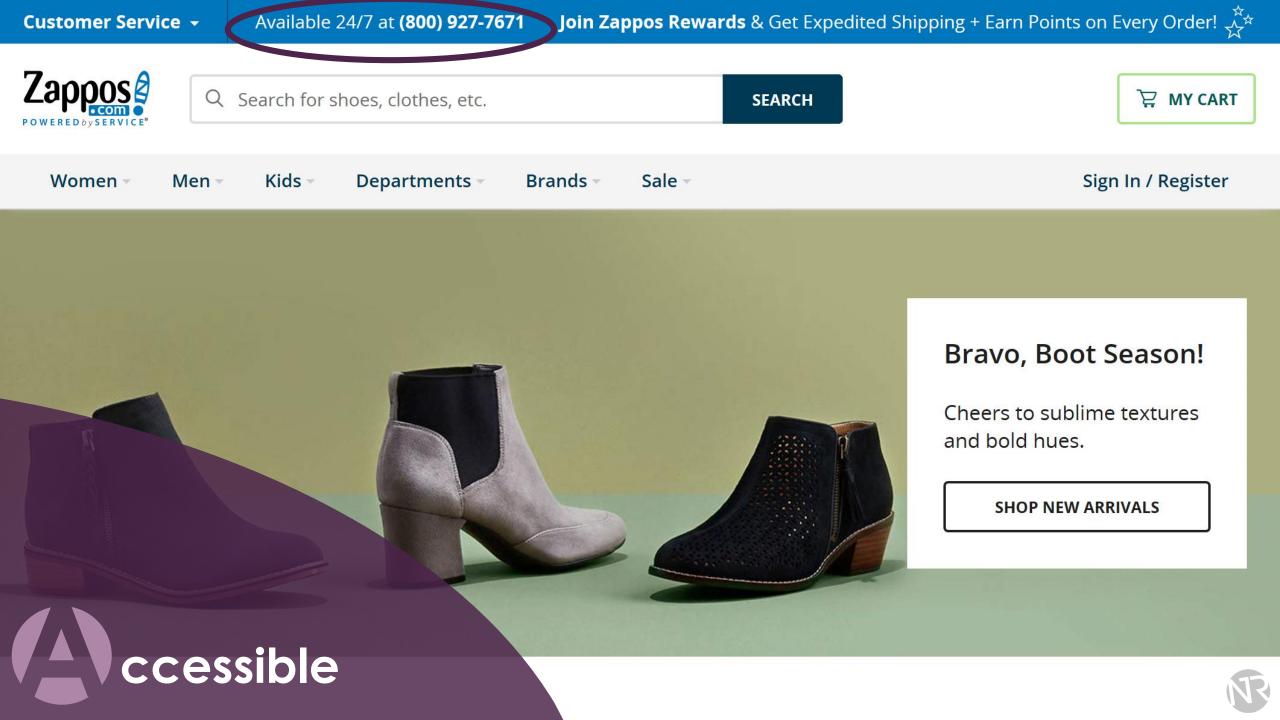




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NR



#### Prime Members Save 20% on Diapers Subscriptions

on Diapers Subscriptions

### ubscription

#### The subscription for highquality home appliances

Save your clothes and the world with Miele washing machines, tumble dryers and dishwashers

#### **The Bundles subscriptions**



Coffee	

View offer

02.04.19

#### Would you rent Ikea furniture? Subscription plans are coming

Ikea is testing a new model in Switzerland: Renting out furniture rather than just selling it. Think of it as Netflix for chairs.















Frictionless
Cessible
Ubscription
echnology

oculus

#### Convenience augmented

NR

#### Speed of delivery

icitional0

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#### LIKELY TO CONTINUE BEING A CUSTOMER

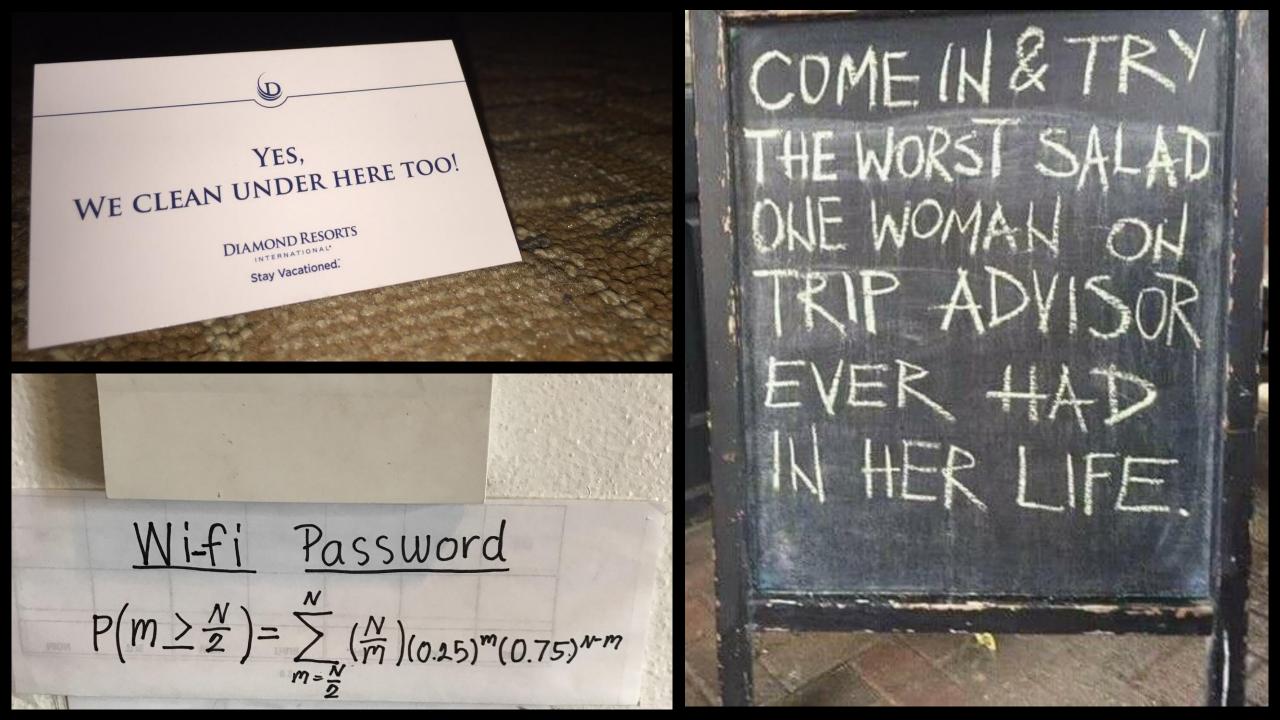
**LOW EFFORT** 

91%

4%

**HIGH EFFORT** 





#### Value







Time

#### Money

#### Emotion



make people want things

make things people want



## The Customer

#### expects extreme

The most Trustworthy Relationship

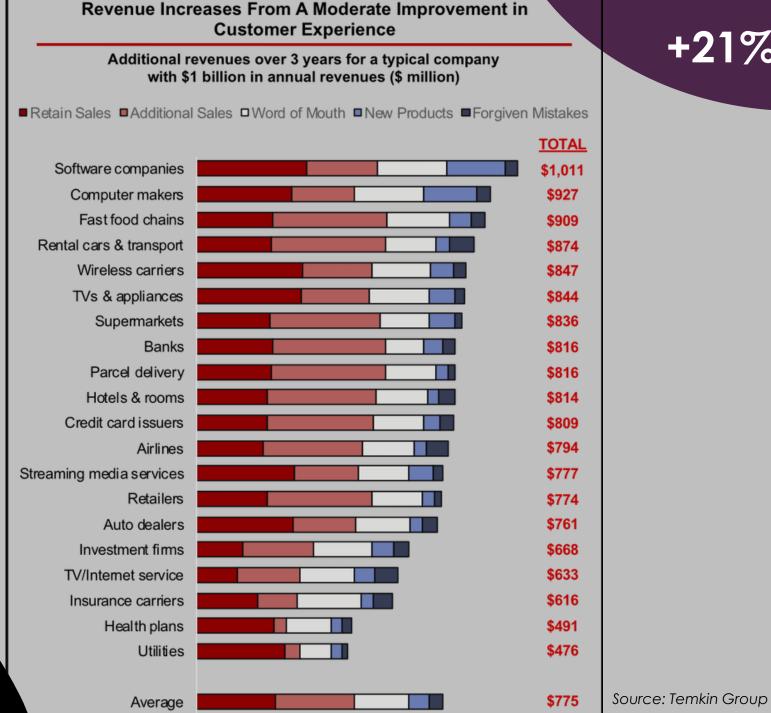
The most Personal Experiences The most Ultimate Simplicity On-demand Services and Products

Transparency

Personalization

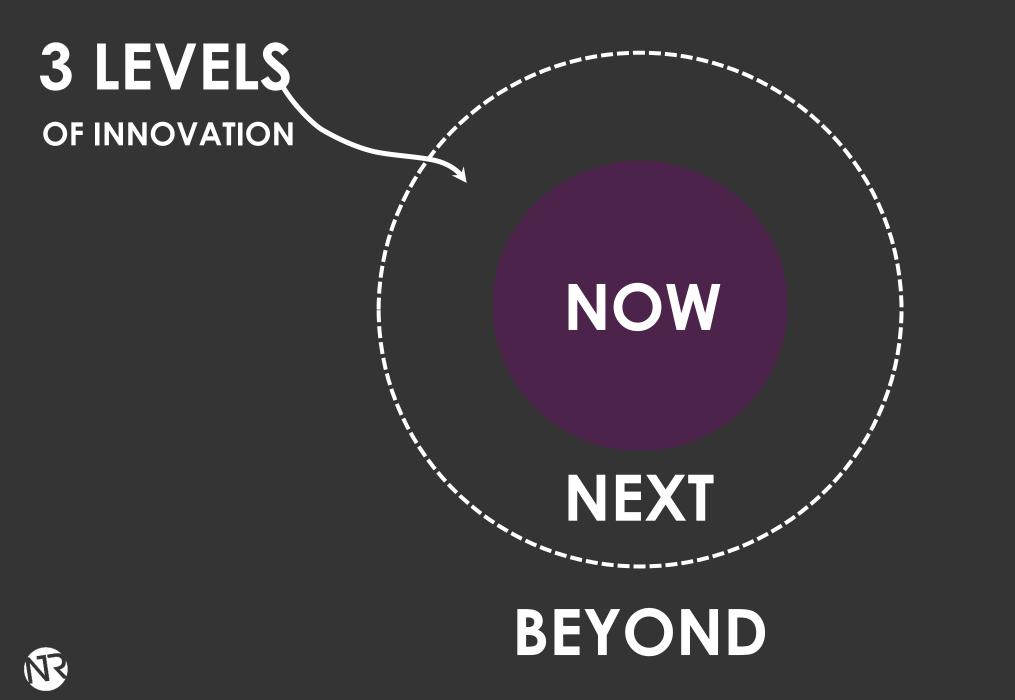
Convenience

Speed



PAY

#### +21% YoY



#### THE CUSTOMER Should be in All







There is only one boss. The customer. And he can fire everybody in the company from the chairman on down, simply by spending his money somewhere else!

Sam Walton, Founder WALMART

is everything going to digitize?

## 

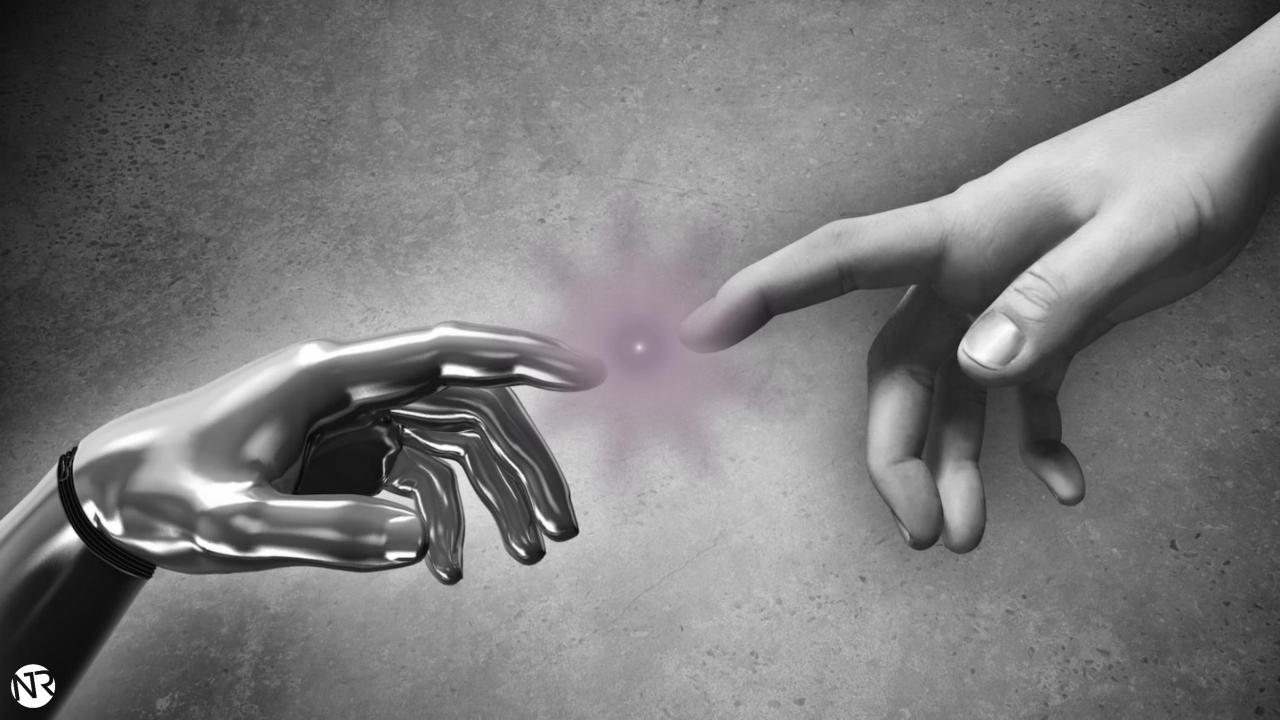


## Man WITH machine



 $AI \longrightarrow IA$ 







# N EX T

#### **EXAMPLE Starts with CULTURE**

#### Attitudes + Actions

#### Beliefs & Ideas

#### **Behaviours & Decisions**



#### "Culture is what people do when no one is looking."

Herb Kelleher, Southwest Airlines

#### "Culture eats strategy for breakfast."

Peter Drucker

Justink, act, and interact

"Culture is the glue that either keeps us doing things well or keeps us doing things poorly."

Ethan Bernstein, Harvard Business School

"Culture is the character of an organization."

Tony Shieh, Zappos













## BLENDING!





## Culture myths



Culture building is HR responsibility It's all about parties & perks

Culture grows organically



Culture can be imposed



### Passion & Purpose

#### WHY

## Brand AND business

### Core values Employee AND Customer engagement

HOW

#### value alignment

Trust Partnership Innovation Performance

OUR VALUES

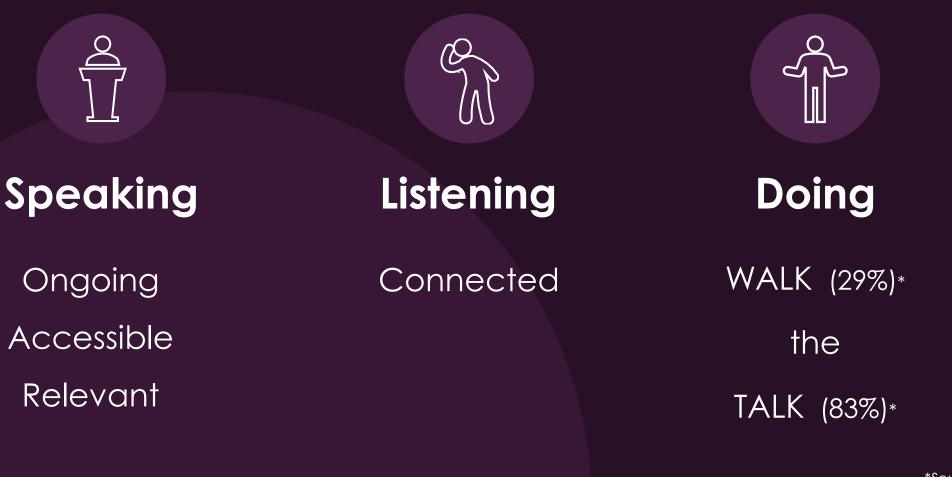
## Lead CULTURE

Culture does not just happen



NR

### Lead CULTURE = communication



NR

\*Source: Gartner

## Lead CULTURE

12 4. 9

Culture needs to be organization-wide



## Lead CULTURE

Culture needs to be diverse



"If you want your company to operate with wisdom, with care, then women are the best"

Jack Ma



#### THIS IS AN AD FOR MEN Profitability

+15%

Revenue

leaders.

with female

Hire more women in leadership roles. We're all worth it.





\*Peterson Institute for International Economics, February 2016, \*Is Gender Diversity Profitable? Evidence fram a Global Survey of 21,980 firms fram 91 countries www.pile.com

## Diversity

Gender

Age

Character

Cognitive Capabilities

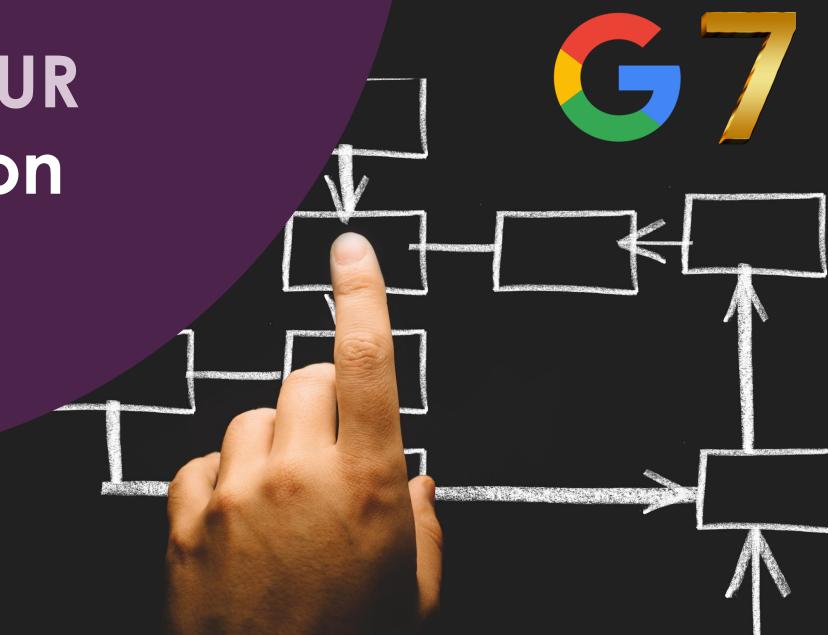


## Lead CULTURE

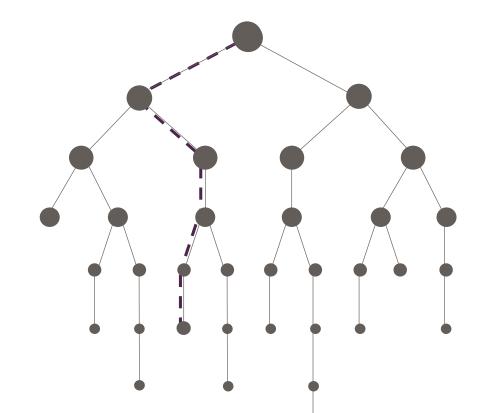
Hire, fire and promote on CORE VALUES



## Design YOUR organization







#### **TRADITIONAL HIERARCHIES**

information moves slowly siloed teams command and control

#### **RESPONSIVE NETWORKS**

information travels fast global talent pool learn and adapt

Connect your network with the networks out there

# IMPROVE EX



Physical Workplace



#### Tools & Technology



Leadership & Communication





**E**mpowered

**E**nergized

Engaged

#### **"EXPERIENTAL** ORGANIZATIONS":



Best Places to Work: 11.5x 1

EΧ

**\*\*\*** 

World's Most Innovative Companies: 28x 1

PAYS

\*\*\*

In-Demand Employers: 4.4x 1



Twice the average revenue



4 times the average profit

**¥**= 25% **¥**= proc

25% smaller (higher level of productivity/innovation)

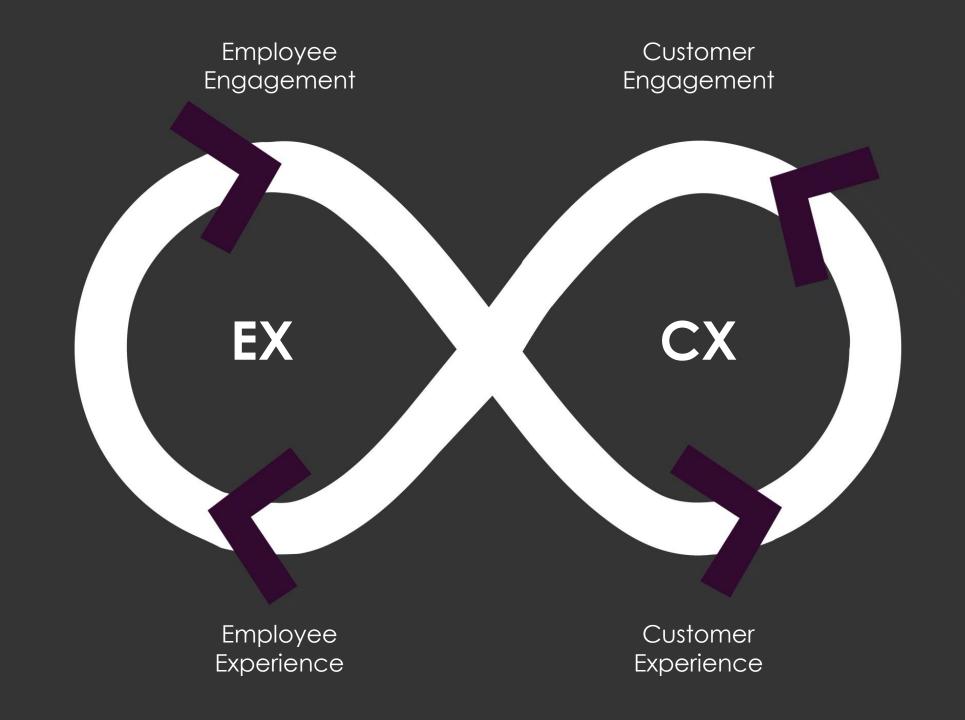


Source: Jacob Morgan

## Experience impacts engagement

## MARRIAGE

EX



NR



"You must unlearn what you have learned"







Have the guts to get rid of your old mental models

#### "The electric light did not come from the continuous improvement of candles"

Oren Harari



### STRATEGIC SHIFTS







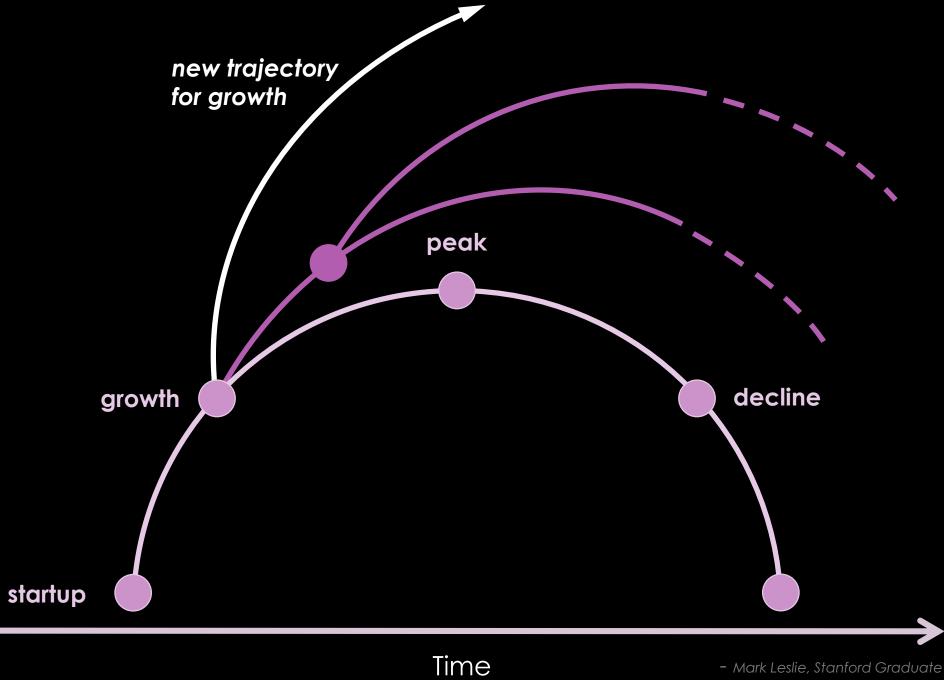
"it's not an experiment if you know it's going to work"

overcome the fear of failure



## haven't failed. l've just found 10,000 ways that won't work.

Thomas Edison



## WILL and SKILL

### Think in opportunities

## Never think in boundaries or limits









## It's all about the

WOW <



#### I've learned that

People will forget what you Said

#### People will forget what you

díð

but people will never forget how you made them feel



Maya Angelou

## THANK YOU



## would love to have your feedback!



