

# THE RESPONSIVENESS REQUIREMENT

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How Agile Marketers Act on  
Consumer Feedback  
to Drive Growth

REPORT | AUGUST 2017

# INTRODUCTION

Omnichannel engagement is the cornerstone of today's customer experience. According to 94 percent<sup>1</sup> of senior marketing decision makers, presenting a connected and personalized omnichannel experience is important—if not critical—to achieving their organizations' business goals.

But the reality is that far too many brands are missing the mark, struggling to deliver contextual, relevant and timely experiences across both digital and physical points of interaction. In fact, only 4 percent<sup>2</sup> of marketers believe they are consistently delivering rich, robust, data-driven, customer-centric experiences across all touchpoints. Making this customer-focused strategy even harder to achieve is the reality that only a small handful of companies (3 percent<sup>3</sup>) are actually exceptional at listening and responding to the needs, wants and voice of the end consumer.

Marketers also admit that there is a significant gap between physical and digital engagements as only 6 percent of marketers have achieved integration and alignment between key touchpoints of their customer's journey. Most often, it is the physical points of engagement that are being left in the cold as nearly half (49 percent) of marketers admit that alignment across touchpoints is selective, at best, and really only across digital channels.<sup>4</sup>

But today's connected end consumer is not willing to wait for marketers to figure it out. When it comes to experiences, speed is key as 52 percent of end consumers in a recent CMO Council survey said the most important attribute of a brand experience is fast response times to issues, needs, requests and suggestions. If brands fail to meet these expectations or persist in delivering frustrating experiences, consumers will walk away, even from brands they love. In fact, 47 percent say they will stop doing business with the brand.<sup>5</sup>

Today's end consumers expect their behaviors and actions to be met with swift action. Historic mergers of online and offline—most recently with the acquisition of brick-and-mortar Whole Foods Market by online powerhouse Amazon—demonstrate how worlds are colliding. Now the end consumer will believe that the personalization and speed of their Amazon Prime order will be replicated down the aisles of Whole Foods. To be sure, this “Amazon expectation” won't be limited to the walls of Whole Foods; the expectation will spill over to every store in the same way it has spilled over into every online experience.

In response, CMOs are tasking marketing organizations with moving at the pace of the end consumer, anticipating their needs and expectations in order to deliver the optimal

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<sup>1</sup>“Omnichannel's Missing Link,” CMO Council, 2016

<sup>2</sup>“Context, Commerce + Customer: Best Practices to Exceed Expectations,” CMO Council, 2016

<sup>3</sup>“Context, Commerce + Customer: Best Practices to Exceed Expectations,” CMO Council, 2016

<sup>4</sup>“Connected Interaction to Power Brand Attraction,” CMO Council, 2016

<sup>5</sup>“The Customer in Context”, CMO Council 2017

experience in the channel that they define in their micro-moment of need. This is, in essence, the very definition of the new omnichannel experience. It demands that all channels and touchpoints move at the speed of digital.

How ready are organizations to meet this call for rapid response?

To investigate these issues, the CMO Council—in partnership with Pantone, MediaBeacon, Esko, X-Rite and AVT, five of Danaher’s Product Identification Platform companies—surveyed senior marketing leaders across customer-obsessed industries like consumer packaged goods, health, beauty and manufacturing to better understand how brands are meeting and exceeding these expectations for responsiveness and action. The study reveals that in the face of customer requests and the rapid pace of channel expansion, marketers are looking toward responsiveness as the new measure of customer experience success, working to more quickly and efficiently react to customer and consumer requests across the entire experience and value chain.

The findings that follow reflect the results of an online study conducted in the second quarter of 2017 and include insights from 153 senior marketing executives. Fifty-four (54) percent of respondents hold a title of CMO, Head of Marketing or Senior Vice President of Marketing, and 33 percent represent brands with revenues in excess of \$1 billion (USD).

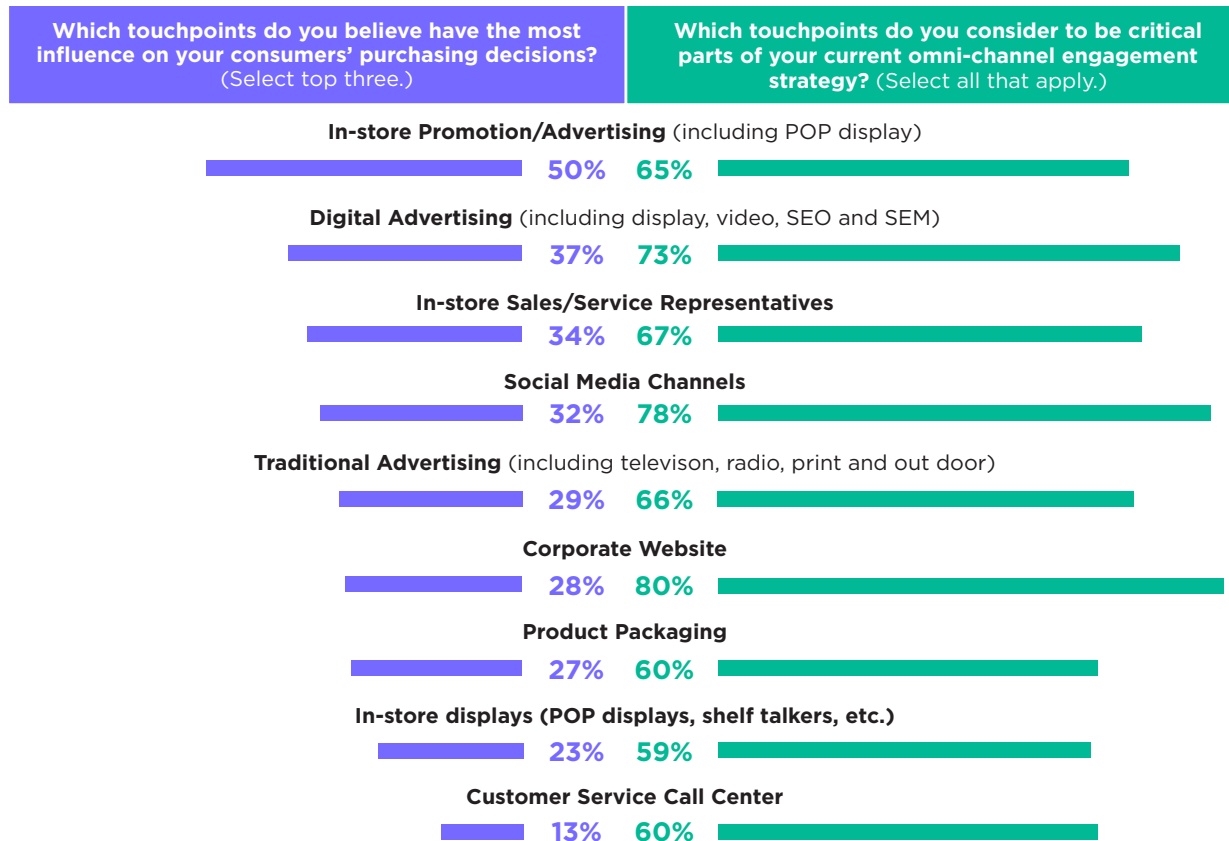
# KEY FINDINGS

For brands that have physical products for sale—whether online or through in-store channels—the reality of the customer experience is that decisions are made in the blink of an eye. In that fleeting moment, brands must enchant customers before they make the decision to become a fan or become a lost opportunity.

## Step Aside, Email...End Consumers Still Want to Get Physical

Marketers are working tirelessly to present exceptional omnichannel experiences. According to study respondents, the most critical touchpoints in this strategy include a broad collection of channels, dominated by digital touchpoints like corporate websites, social media channels and digital advertising. But notably, it is a series of key physical engagements that truly stand out as being part of an exceptional experience—specifically the in-store sales representative, traditional advertising, in-store promotions and product packaging.

Most telling is that physical touchpoints like product packaging and in-store displays are seen as just as important, if not slightly more important, to the success of the overall experience as channels like email, direct mail and mobile apps...three digital channels that actually fail to crack the “Top 10 List” of critical channels.



But when marketers were asked to rank channels in order of influence over a consumer's shopping and buying behavior, a shift is clear as digital channels give way to the importance of physical touchpoints also being part of the omnichannel experience. Corporate websites might top the marketer's list of critical channels, but it is actually in-store activities and resources—including point-of-purchase displays, in-store advertising, in-store sales reps and product packaging—that have the most influence over the consumer's behavior. This reveals a significant gap in what marketers say is critical to delivering an omnichannel experience and what channels actually have the most influence on the end consumer's buying behavior.

### **Prioritizing Marketing Performance Over Business Success**

Digital, in the past several years, has emerged as the efficiency powerhouse: easy to create, easy to deploy and even easier to track, measure and prove return. But the impact of physical touchpoints like POP and product packaging were asked to take a back seat: too hard to create, too hard to update, too hard to track and measure, and even harder to reimagine at the speed of customer expectation. So marketers dove into digital without hesitation, hoping to leave the burden of developing physical touchpoints behind.

However, this created a strategy of convenience versus a strategy for optimal customer engagement. In this age of connection, customers expect to be in control of their own destiny, but they also expect brands to deliver consistently relevant experiences, regardless of channel. And consumers expect value, whether through cost savings or engagements that save them time. It is not enough to accomplish some level of brand consistency across physical and digital; marketers need to create a seamless experience that resonates because it is relevant and full of value.

Marketers understand this challenge as 53 percent of respondents admit that alignment across physical and digital touchpoints is an important focus of the customer experience. Some 34 percent actually believe this connection is critical. The criticality of alignment likely comes from an understanding that consumers crave recognition and specifically want to see their voices, desires and needs reflected back to them, especially in the channels they value most. They expect relevance and value, from the websites they visit to the products they pluck from the shelves.

Successful CMOs are keenly aware that truly exceptional experiences have a cadence to them—a connectivity that is timed and aligned, making sure that the customer and the multitude of possible touchpoints available are in sync at each relevant micro-moment of need. But as the study shows, reality is not quite as seamless as siloed and budget-strapped functional teams struggle to deliver and make sense of an increasingly complex omnichannel landscape.

When asked to outline the primary obstacles standing in the way of a consistent, connected omnichannel experience, first and foremost, marketers pointed to complexity as the top challenge.

- 55 percent of marketing respondents say that managing the complexity of the landscape is their top challenge.
- 51 percent feel they lack the budget to implement the systems and tools needed to manage this complexity.
- 46 percent say that functional silos across the marketing landscape have separated teams into physical or digital groups, enabling specialization and functional focus but making alignment and cohesion across these channels even more difficult; 40 percent of marketers admit that it is actually the silo wall between their organization and their retail customer that also poses a significant challenge.

This experience gap separating digital and physical touchpoints becomes even more substantial and potentially damaging when you consider how important these touchpoints truly are for consumers. Product packaging delivers the most interesting example. Marketers are acutely aware that their consumers are very sensitive about product packaging consistency as they will speak up if something is different. Some 54 percent of respondents say their consumers expect packaging consistency, no matter where they buy the product, whether online or in store. In fact, only 3 percent of respondents say that their consumers don't care at all about product packaging.

What makes this revelation a reason for concern is marketers' earlier indication that the impact of product packaging on the consumer buying process was actually quite high, outpacing some digital channels. Yet in today's race to achieve an efficient, digitally led omnichannel experience, key factors around consistency, alignment and connectivity are clearly challenges for marketers to achieve at scale, in real time and uniformly.

### **The New Experience Factor: Responsiveness**

Knowing that brands, especially those in retail and the fast-moving consumer packaged goods industry, are competing for wallet share in a seemingly endless web of rapid-fire journeys, marketers are looking for new ways to differentiate customer experience strategies. While consumers may start to investigate the possibility of a purchase online in the comfort of their own homes, they are then thrown onto a new path when greeted with signage, promotions and enticements on every shelf. The decision to buy can come down to something simple—loyalty to a brand or the familiarity of a product package that the customer always knows and reaches for—or it can be far more complex, with new motivations and needs that the customer has in that micro-moment.



And while many brands have created competitive differentiation by amplifying their digital experiences, none of these may matter if the experience of reaching for that product on the shelf fails to do one critical thing: reflect the requests, needs and expectations of the consumer. This ability to know, understand and then react to the consumer is what we have dubbed responsiveness, and it will be where new competitive battle lines are drawn. But the problem is that responsiveness is not just measured in a digital landscape. In fact, it is the digital realm that has set the pace of responsiveness in the minds of the consumer.

If responsiveness will be the next gold standard for the customer-centric brand, how close are we to reaching it? How meaningful is responsiveness to delivering an exceptional customer experience? According to 90 percent of senior marketing respondents, it is important, if not critical.

However, only 16 percent of marketers feel their organizations are extremely responsive to the consumer, ready to make changes to products, packaging, services and experiences based on consumer requests and feedback. And organizations are slightly less equipped to handle requests based on the requests and feedback of their retail customers as only 12 percent of respondents feel their organizations are extremely responsive to the needs of their direct buyers.

The reality is that the ability to offer a rapid response is dependent on the channel of engagement for many brands. In fact, 36 percent of respondents say that their response time to the end consumer depends on the channel; for digital experiences, they can respond quickly, but for physical experiences—including packaging—it can be too costly to respond or may take much more time to react.

#### MARKETING'S LEVEL OF RESPONSIVENESS

| TO END CONSUMERS                | TO RETAIL CUSTOMERS             |
|---------------------------------|---------------------------------|
| Extremely Responsive (16%)      | Extremely Responsive (12%)      |
| Fairly Responsive (45%)         | Fairly Responsive (61%)         |
| It Depends on the Channel (36%) | It Depends on the Channel (22%) |
| Fairly Unresponsive (3%)        | Fairly Unresponsive (5%)        |
| Extremely Unresponsive (0%)     | Extremely Unresponsive (0%)     |

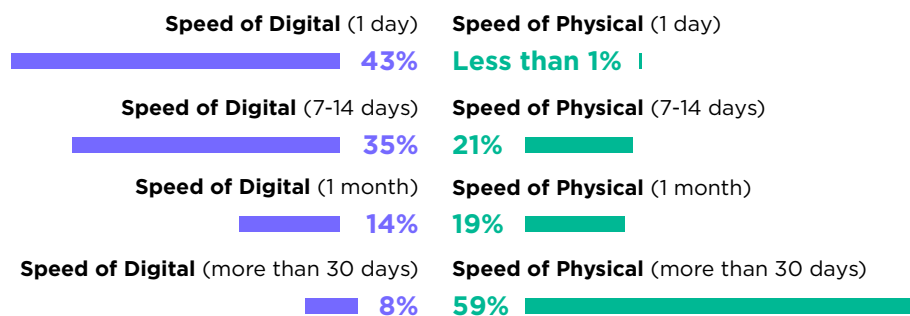
### Responsiveness in Action: Are We Reacting Quickly Enough?

On average, marketers feel they are able to respond or react to consumer feedback, requests, suggestions or complaints specific to marketing campaigns in less than two weeks. In fact, 78 percent of marketers surveyed are able to meet this fast expectation, with 43 percent actually saying that they are able to respond to the consumer within 24 hours.

On the surface, this is exceptional news as marketers are acting quickly and, when and where possible, exceeding the expectation of the consumer by quickly responding to suggestions, requests, issues and complaints. But this also sets a precedent. This rapid response, enabled by fast-moving digital channels, sets an even greater expectation with the consumer: that responsiveness is possible. This is responsiveness at the speed of digital, and it will quickly become the consumer’s standard expectation.

But how responsive are marketers across physical touchpoints? According to 77 percent of respondents, it can take up to 90 days to respond, with 36 percent admitting that they are only able to react and respond to consumer feedback, suggestions or issues with product packaging within three months. This leaves a gap between reality and consumer expectations, which are now set at response times between 24 hours and two weeks, at most.

#### RESPONSIVENESS TO CONSUMER FEEDBACK AND REQUESTS



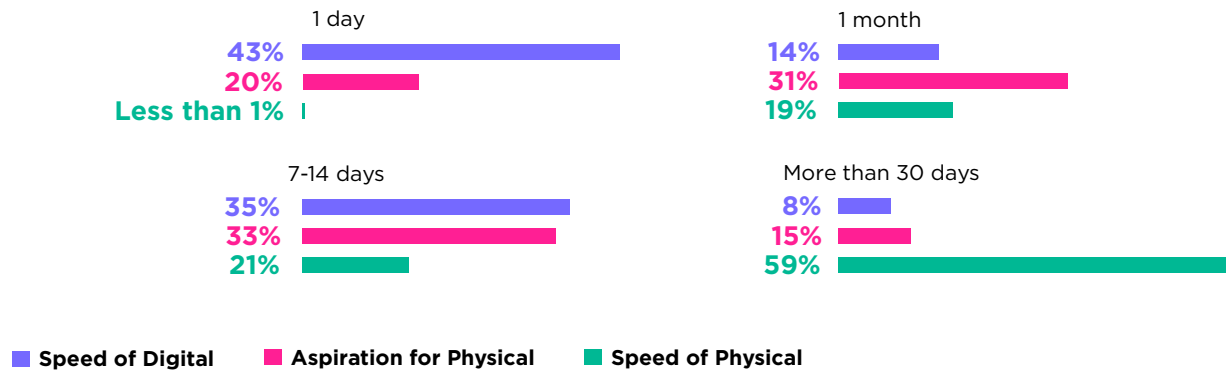
### Moving at the Speed of Digital

With responsiveness becoming an even more critical aspect of the customer experience, marketers understand that this gap between two weeks and 90 days simply cannot continue. In fact, most marketers have some lofty goals to reach specific to the ability to accelerate how quickly updates can be made to product packaging and other physical touchpoints.

Marketers are looking to aggressively close the gap, with 53 percent of respondents wanting to be able to make changes to physical touchpoints in less than 14 days. Many, 31 percent, would like to see the window of responsiveness shrink to less than 30 days. An aggressive few actually aspire to achieve one-day turnaround times.



## RESPONSIVENESS TO CONSUMER FEEDBACK AND REQUESTS



Marketers are trying to be realistic in that, while packaging updates might not be possible in one day, there is a reasonable expectation to reflect consumer trends, suggestions and requests or to address customer complaints around packaging within 30 days. Unfortunately, consumers may not be as realistic as the speed of digital has established unreasonable expectations for instant gratification.

In an effort to meet consumers somewhere in the middle, marketers are looking to bridge the gap with new execution partners and resources but feel that advancing will be costly. First and foremost, marketers believe they will need additional budget to be able to make more frequent updates to packaging. While 45 percent indicate they need increased budgets, 41 percent worry that making any changes will simply be too cost prohibitive.

Some 31 percent of marketers feel they will need new partners who are able to work quickly to deliver updated materials in an expedited timeframe, creating a real call to action for transformation across the marketing supply chain. What is needed, specific to the optimization of physical touchpoints, are partners armed with processes and technologies that better meet the needs of today's consumers and their expectations for responsiveness. But marketing supply chain responsiveness won't be the only point of transformation needed as marketers also point to a real need for a cultural transformation toward this more consumer-centric/customer-centric mindset.

One in four marketers admits that adopting a more agile corporate culture that allows for accelerated response to requests will be an important factor—specifically citing that there are too many people involved in making critical packaging decisions, which causes delays in the process. Silos once again pose a considerable challenge as a substantial 34 percent point to functional silos, this time spanning beyond marketing and reaching across the organization. Instead of segmenting marketing teams into physical and digital silos, marketers feel

that because of cross-functional barriers, marketing has been separated from product and packaging teams, making it difficult to share consumer feedback and insights.

Corporate culture issues, either within the marketing function or across the entire organization, are not simple to resolve. Furthermore, none of the issues slowing responsiveness can be resolved without a clear view of the marketing supply chain, especially when it comes to the process and progress of physical touchpoint creation and delivery. What is needed is transparency fueled by data. Unfortunately, gaining access to this data is also a challenge.

**Building a Culture of Transparency to Make Responsiveness a Reality**

What quickly emerges from this study is a distinct desire from marketers to better keep pace with the wants and desires of two critical constituencies: the end consumer and the retail partner customer. Both have specific requirements across digital and physical experiences that must be quickly and effectively addressed. But in the end, both end consumers and retail customers demand relevance (i.e., products, services and experiences that are contextual to the needs of the market and that drive value), and brands must answer with responsiveness. Both constituencies will choose to do business with brands that deliver relevance through responsiveness.

This need raises a very specific question: How responsive is a brand’s marketing supply chain, especially when physical materials are involved?

In order to make significant strides in responsiveness and to empower a marketing supply chain to operate at the speed of the customer, key shifts must occur in three important areas: culture, transparency and partnerships.

**THREE KEY SHIFTS TO ACHIEVE RESPONSIVENESS**

| CULTURE   | TRANSPARENCY  | PARTNERSHIPS   |
|---|---|--|
| Cultural shift to prioritize customer over product<br>(60%) | Access to data and insights to enable teams to quickly learn consumer needs, issues and expectations<br>(46%) | Procurement becomes part of the solution, identifying vendors that enable responsiveness, not just the least expensive partners<br>(46%) |

When asked what changes would need to occur in order to improve responsiveness, 60 percent of marketers pointed to a need to shift the organizational mindset to prioritize the customer over the product. This culture shift would demand changes across the entire orga-

nization, from the top down, and would transcend functional and operational silos. It would need to address all of the previously noted operational dysfunctions that stymie the experience, including the functional silos that segment digital and physical experiences and the decision-by-committee culture that many marketers feel is getting in the way of rapid response in product packaging updates and changes.

Transparency, in today's world of technology and connections, relies on data and access to intelligence about the people, processes and platforms that keep experiences running. However, according to 46 percent of marketers, lack of access to the right data and intelligence that would enable product teams to readily access customer insights and allow creative teams to quickly learn about customer needs and expectations is a significant disadvantage that stands in the way of responsiveness. This echoes previous findings that marketers have been cut off from the data that is so vital to transformation. Not only do 34 percent of marketers believe they lack the data to be able to make the right decisions on product packaging updates, but a savvy minority also admit that they lack transparency across the production process to even understand where optimization can occur.

And finally, marketers understand that even if cultures shift and transparency reveals the gaps and sticking points across the entire supply and value chain, without the right partners, responsiveness will still be out of reach. According to 46 percent of respondents, the first change will need to be internal as marketers look to procurement teams to be value-added partners, identifying vendors and resources who are more responsive and able to operate at the speed of the consumer. Marketers are looking for strategic guidance to bolster responsiveness...not just a partner that can identify the lowest-cost provider.

In addition to this, marketers are also seeking out technologies and platforms that can connect and align resources and partners across the entire production ecosystem. To further support the ability to accurately assess and monitor needs and requirements, brands are looking for cross-functional transparency—not just vertical views into individual silos.

### **The Manifestation of Responsiveness: Real-World Examples of Expectation and Response**

All too often, calls for amplification of the customer experience or even responsiveness can feel too holistic and ethereal to tie to true business goals and mandates. But when making a case for responsiveness and product packaging, the applications and examples make this concept all too real and even more critical to achieve. Consider selling happiness...or in the case of Coca-Cola, adopting a strategy where selling happiness manifested in a massive shift to the supply chain, personalizing individual cans and bottles of Coke to share with a friend.

The mere act of identifying new names that resonate and reflect individual markets is daunting enough, but then consider everything involved in customizing those physical product

packages and creating hundreds of iterations of artwork for hundreds of names. The sheer complexity of sharing a Coke raises the question: Do you know what it takes to manage this type of campaign through the entire supply chain, from concept to end consumer?

Chances are, you may not. The web of technologies and processes that run these types of projects is far too often trapped behind the silo walls that have been identified throughout this report. But once an organization has navigated this complex supply chain, personalization becomes possible, and the ultimate test on omnichannel consistency becomes an opportunity to reach, captivate and engage an audience of one in a crowded and noisy shopping aisle.

### **Example: A Simple Cereal Box**

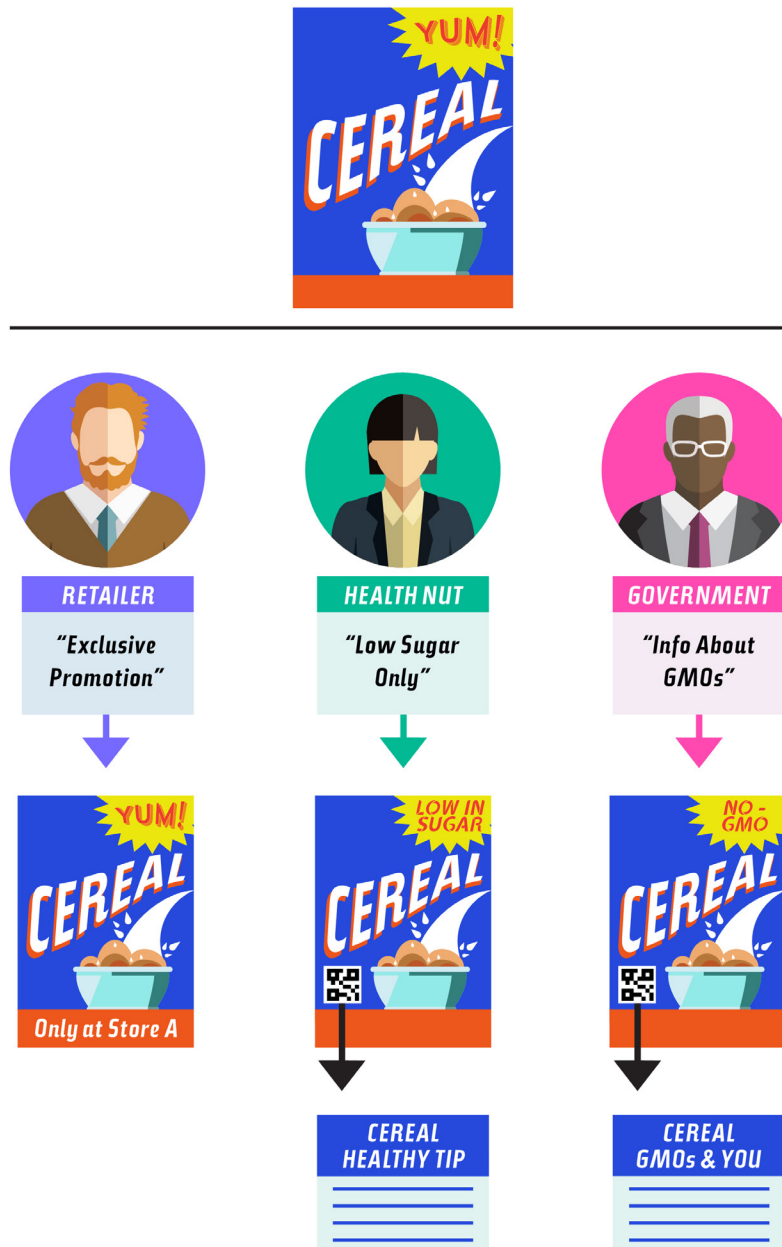
Consumers love their cereal. In fact, according to multiple reports, more than 2.7 billion boxes of cereal are sold every year in the U.S. alone. Meanwhile, consumers have grown increasingly wary of the use of genetically modified organism-based ingredients. As a result, in July of 2016, the US Senate passed a bill establishing a new national standard for labeling food that contains ingredients from genetically modified crops.

In the traditional marketing supply chain mindset for packaging, this new labeling mandate could be handled by simply updating product packaging at the next run or whenever the supply chain would allow. But this allows opportunity to slip away and runs the risk of failing to be compliant with new regulations. Instead, with responsiveness in mind, brands have the opportunity to celebrate their non-GMO ingredient list or identify ways to educate their consumers about the ingredients within the box.

Responsiveness allows the manufacturer to merge the digital with the physical, creating callouts for new value propositions that are in line with today's customer mindset while also adding QR codes or augmented digital campaigns that extend the experience from packaging into a digital engagement. Responsiveness empowers the marketer to have both, bridging the gap between physical and digital—not making a choice between them, but instead adopting the best of both experiences. For our humble box of cereal, it means the addition of a QR code right alongside callouts for non-GMO messaging that can quickly and easily become callouts for lower sugar, natural flavors or any number of changing values that are top-of-mind for the consumer.

Responsiveness leaders can constantly update and iterate their digital destinations while also making cost-effective and timely updates to the physical package without the lengthy timelines that can turn relevant messaging into a fading fad in a matter of months. Responsiveness becomes an opportunity to understand the mindset of the customer in their moment of need and reflect that back from the shelves of the local store.

ILLUSTRATING RESPONSIVENESS TO CUSTOMER NEEDS AND VALUES



The applications of how a brand could respond to the current social mindset of a customer seem endless, but from allergen callouts to cross-selling new products and pairings, product packaging becomes the first moment to introduce a solution or response or simply to prove to consumers that they have been heard.

To be sure, responsiveness is not just intended to placate the end consumer. It is an important tool needed to better partner with retail customers to create differentiation and advantage, manifesting through requests for specialized packaging or exclusive offerings.

Responsiveness means saying “yes” to the last-minute request for special packaging or labeling for a timely retail promotion that would only be available in a limited number of stores. Rather than passing on a sales opportunity, savvy brands will be able to accelerate responsiveness and work with vendor partners to accelerate and deliver on a smaller box that is red instead of blue.

### **Conclusion: Keys to Getting Started**

Marketers must reach for responsiveness as the next great opportunity to thrill and embrace the needs of the customer and consumer. And it won't be enough to just reach for digital responsiveness...responsiveness must be the measure of both digital and physical touchpoints. It is the next evolution and advancement of the customer experience strategy. Responsiveness becomes a business mandate that capitalizes on how quickly brands are able to turn customer voice into a decision to purchase.

So where can marketers start to ramp up responsiveness across the customer experience? As we have been mastering responsiveness across digital channels, now is the time to turn our eye toward those critical physical touchpoints that most greatly impact consumer buying behavior and, in turn, the bottom line.

Smart marketers are getting started by:

- **Starting strategic conversations internally to bring product packaging and physical touches like POP displays and promotions into the customer experience dialogue.** This isn't just about printing and getting packaging made; it must be discussed as a critical touch in a multi-touch, connected experience.
- **Setting the expectation that procurement must act as a strategic partner and not just a cost-cutter.** Together, marketing and procurement must identify vendors that can meet responsiveness goals, not just budgetary ones.
- **Demanding transparency.** Marketers need to develop supply chain relationships that provide continuous data streams with the intentional goal of total transparency across the supply chain to track everything from creative iteration and collaboration to works-in-progress.
- **Broadening the meaning of omnichannel to including everything from social posts to product packaging.** It is time to bring physical and digital together, if for no other reason than this: The consumer thinks of us as one brand—not a physical brand and a digital one.



## EXPERT PERSPECTIVE

Dear Reader,

Imagine this: A children's game turns into an overnight global success and stores sell out. The CMO thinks: "We thought it would be big, but we didn't think it would be THIS big." How quickly can they produce more product, packaging, shelf trays and even POP displays? How much will the company capitalize on the revenue opportunity from this surprise surge in consumer interest before it ebbs away?

Here's another scenario: A new allergen emerges, and consumers begin to search on packages and websites to ensure the products they love (or want to try) don't contain this ingredient. Marketers want their packaging and websites to add a line of copy stating that the product line is free of this allergen. How long will it take to change the websites and get the new packaging in-market?

Three questions:

- How do you measure responsiveness in your value chain?
- Now that your organization has generated strong demand using digital channels, how will you develop the ability to satisfy demand using physical channels?
- Why is the execution process so much slower for physical channels than for digital channels?

It's clear from the prior pages that consumers don't think there should be a gap: Consumers' expectations are set at the pace of digital. Big brands, however, are experiencing a false sense of security, thinking that slower turnaround times for changes to physical media are acceptable. In fact, in our daily conversations with marketers, many don't even know how long it takes to execute a packaging change (an average of 6.5 months, according to "The Future of Packaging Workflows" by InfoTrends).

Brands can mirror their consumers' changing attitudes much more quickly than this. Consumers want brands to be like them—to reflect their wants, needs and aspirations. With the technology available today, smart companies are turning these times from quarters to weeks, keeping in mind the pursuit of immediacy.

Here are some suggested actions and questions that you can begin asking today to get your team thinking about responsiveness in the physical fulfillment as a competitive advantage now, before it becomes the new table stakes.

**Corral all of the content makers.** The consumer sees you as one brand, not as a product and a marketing campaign separately. To support this, we see some companies aligning all brand content development under one creative/marketing leader, whose team consists of subject matter experts for families of different types of digital and physical omnichannel deliverables (i.e., TV/video, digital/web/social, packaging and in-store, events and out-of-home). Doing so stimulates the centralized creation, retrieval, reuse, repurposing and publishing of content assets. As a single cost center, the teams are more likely to use the same content creation, workflow and asset management tools and practices, further harmonizing efforts, driving out inefficiencies and speeding time to market. To get started, ask:

- Who are all of the people responsible for creating or approving branded content, whether digital or physical?
- How can we more closely associate these people?
- Are these teams using separate systems now? Can we leverage one to remove the cost of others?
- Do we have the right goals articulated to push us toward delivering better responsiveness?

**Connect technologies for real-time transparency.** We hear retailers asking for more supply chain transparency from their consumer goods suppliers. We hear CPG companies asking for more frequent status updates from many third parties, from creative agencies and designers to packaging and POP printers and converters. As more and more parts of the value chain are digitized, automated and connected, we all will achieve greater, collaborative visibility into what is actually happening on the path to market now, not what happened last month. To get started, ask:

- How many technologies do we use to bring all of our physical and digital consumer communications to market?
- How do these technologies present data to the business so leaders can pull levers to adjust priorities, realign resources and apply pressure as the market conditions change from day to day?
- Which systems and processes should we connect together to improve through-put?
- What information do we need frequently from our supply chain? What information do our retail customers need from us?

**Simplify the entire value chain.** The flow of value through the marketing supply chain is long and complex: from brand and design concept to packaging design, to 3D digital renderings, to color specification and communication, to omnichannel campaigns, to prepress manufacturing and quality checks along the way, to e-commerce initial item setup.

Each touch, turn or decision incurs time and cost and is an opportunity to create errors. The more that we replace analog processes with digital tools, the more that can be automated, and the more tools that are connected, the quicker and more cost-efficiently your company will deliver new products, marketing campaigns and packaging changes to market. To get started, ask:

- What are all of the steps involved in getting communications and packaging to market?
- Where are the inefficient handovers between value creators? (i.e., where do our partners generate re-work, not meet our quality expectations, or require re-checking?)
- What would the impact be on our business if our time to market for physical and digital communications could be half of what it is today?
- What would the impact be if our time to market for new products could be half of what it is today?

Our companies believe that the broad range of consumer communications must undergo a digital transformation similar to what core business processes are undergoing in order to deliver the kind of agility—the responsiveness—that's required to adapt and compete in a market where complexity abounds, regulatory bodies change requirements frequently, and consumer preferences flip and flop.

Our vision is to digitize, automate and connect the packaging value chain and, more broadly, to do this for the full marketing supply chain to deliver greater speed, improved quality and cost reductions to consumer goods brands. We support value creators in all parts of these work streams with brand color consulting, color formulation and control, appearance virtualization, digital and marketing asset management, collaborative workflow, automation for printers and converters, automated quality inspection tools, and more.

Many thanks to the CMO Council for your partnership in bringing these important issues to light so all may benefit!

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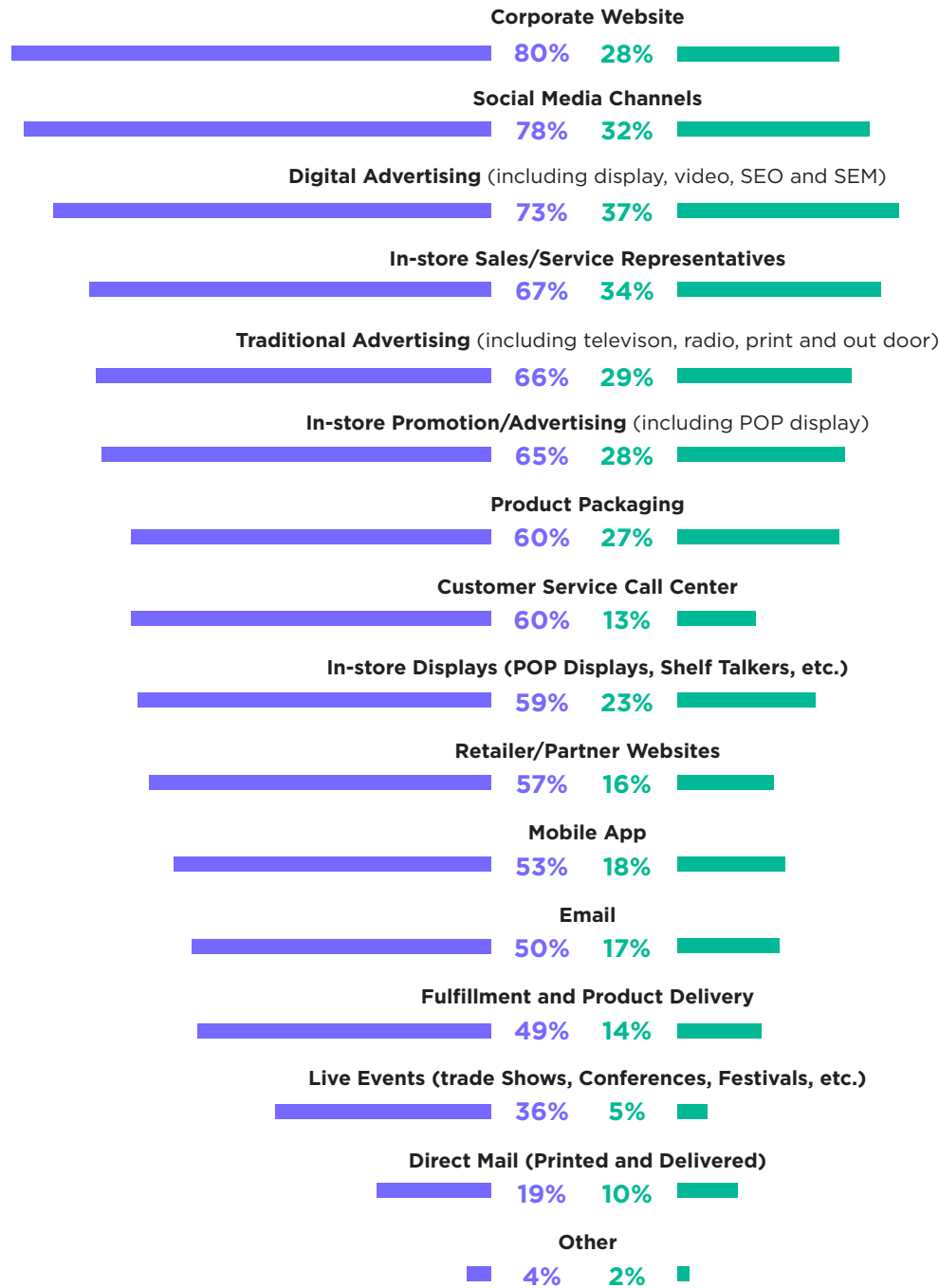
 **DANAHER**

**JOAKIM WEIDEMANIS**

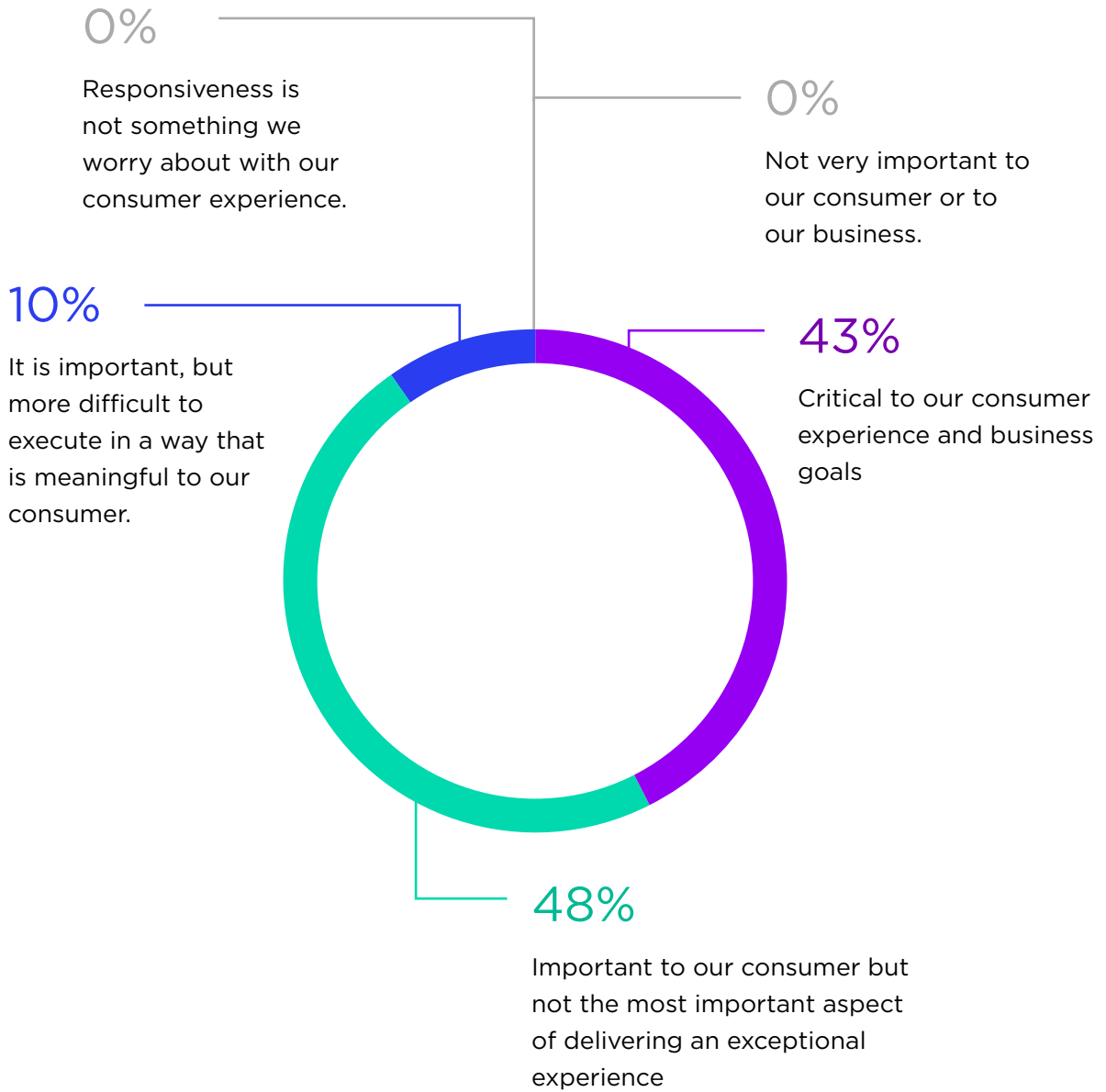
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Product Identification, Danaher

# DETAILED FINDINGS

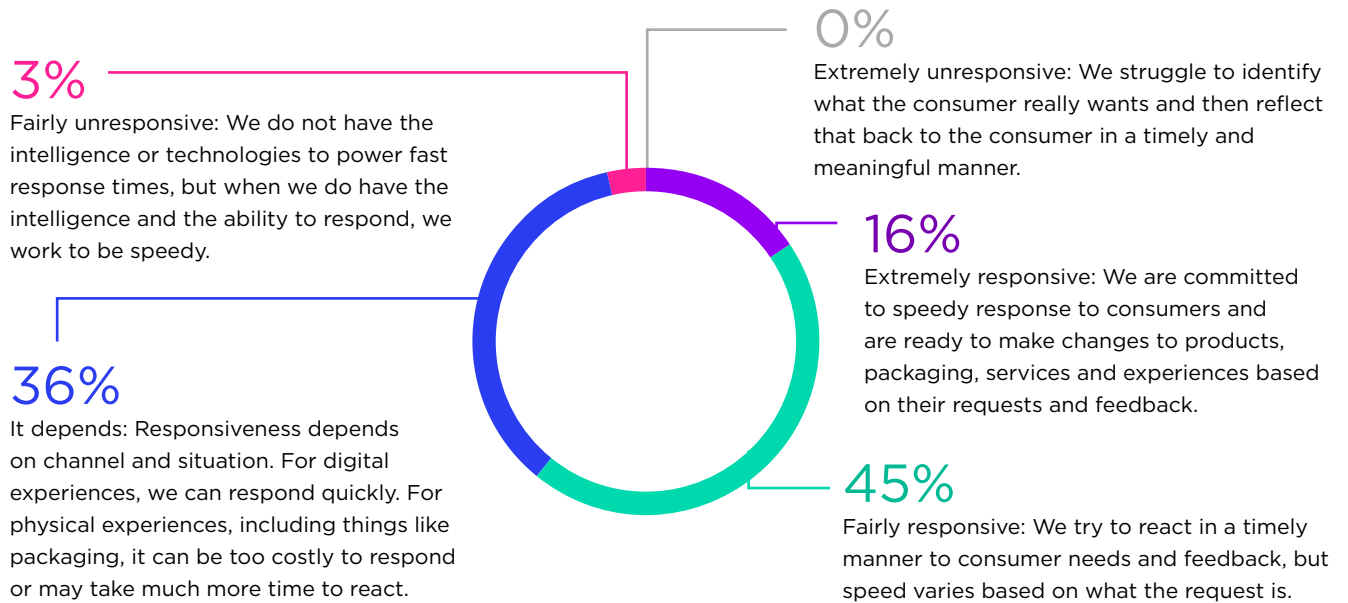
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|---|---|
| <b>1. Which touchpoints do you consider to be critical parts of your current omni-channel engagement strategy? (Select all that apply.)</b> | <b>2. Which touchpoints do you believe have the most influence on your consumers' purchasing decisions? (Select top three.)</b> |
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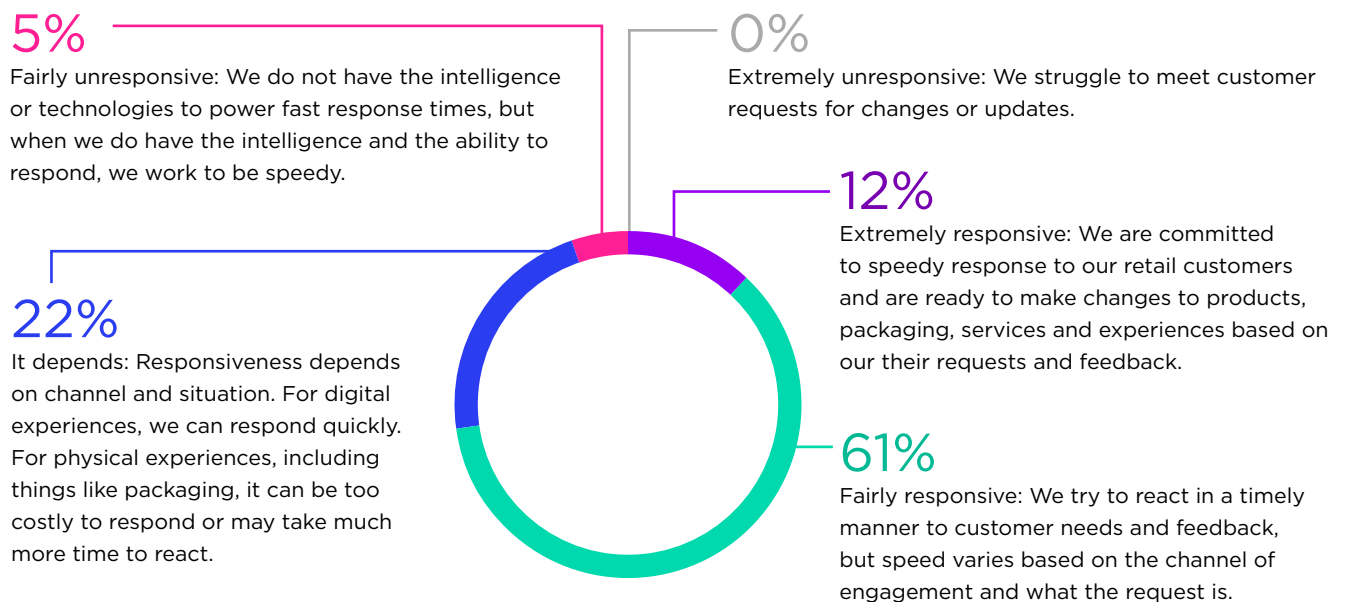
**3. How important is responsiveness (the ability to respond quickly and positively to feedback, preferences and challenges) to delivering an exceptional consumer experience?**



**4. How capable is your organization of responding to the needs, behaviors and preferences of your end consumers?**

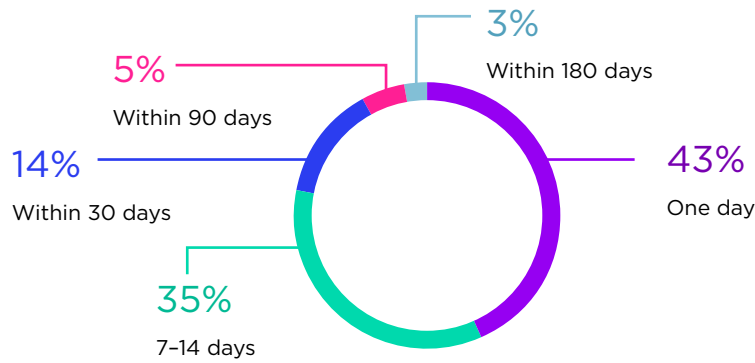


**5. How capable is your organization of responding to the needs, behaviors and requests of your retail customer?**

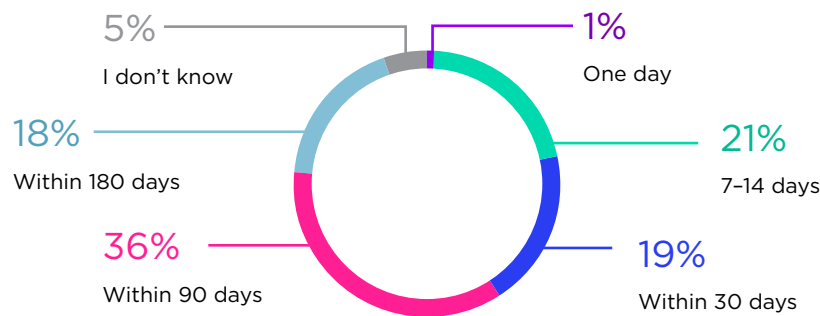




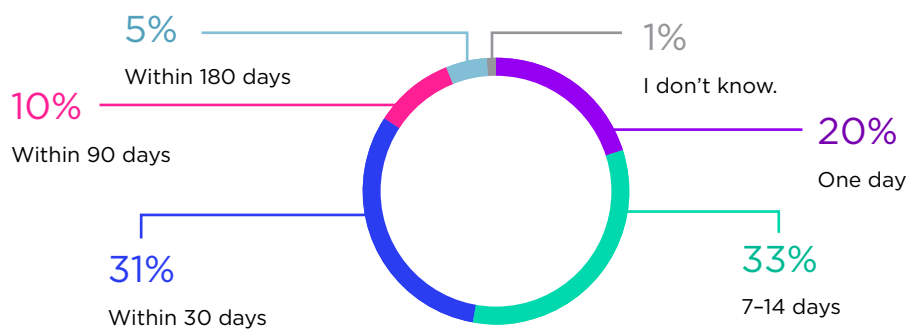
**6. On average, how quickly are you able to respond and react to consumer or customer feedback, suggestions, requests or complaints about marketing campaigns (including digital touchpoints like web, online advertising, mobile and social media)?**



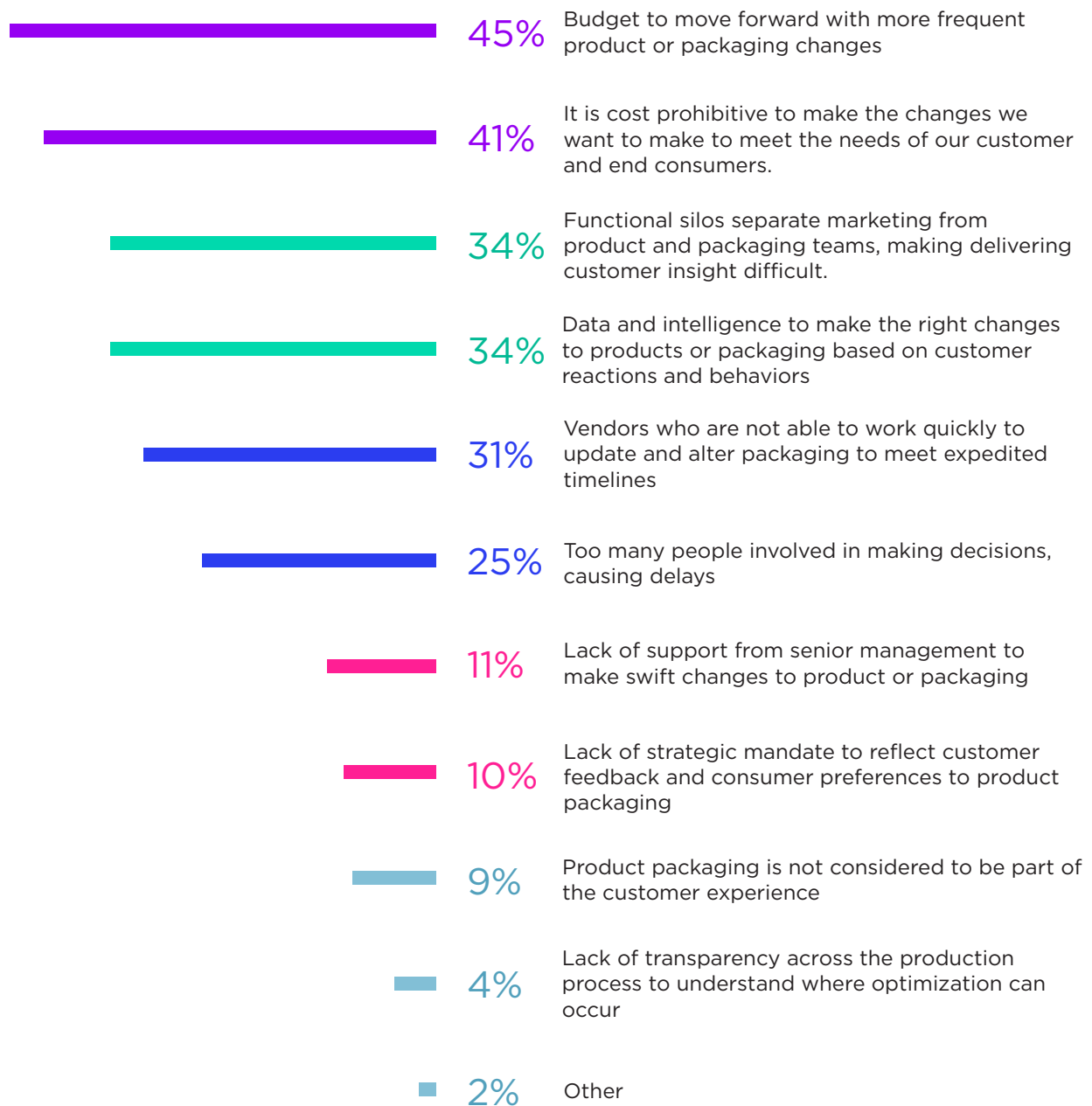
**7. On average, how quickly are you able to respond and make changes based on consumer or customer feedback, suggestions, request or complaints about physical touchpoints (including products, in-store promotions, product packaging and POP display)?**



**8. How quickly would you like to be able to respond and make changes to physical touchpoints (including products, in-store promotions, product packaging and POP display) based on consumer or customer feedback, suggestions, request or complaints?**



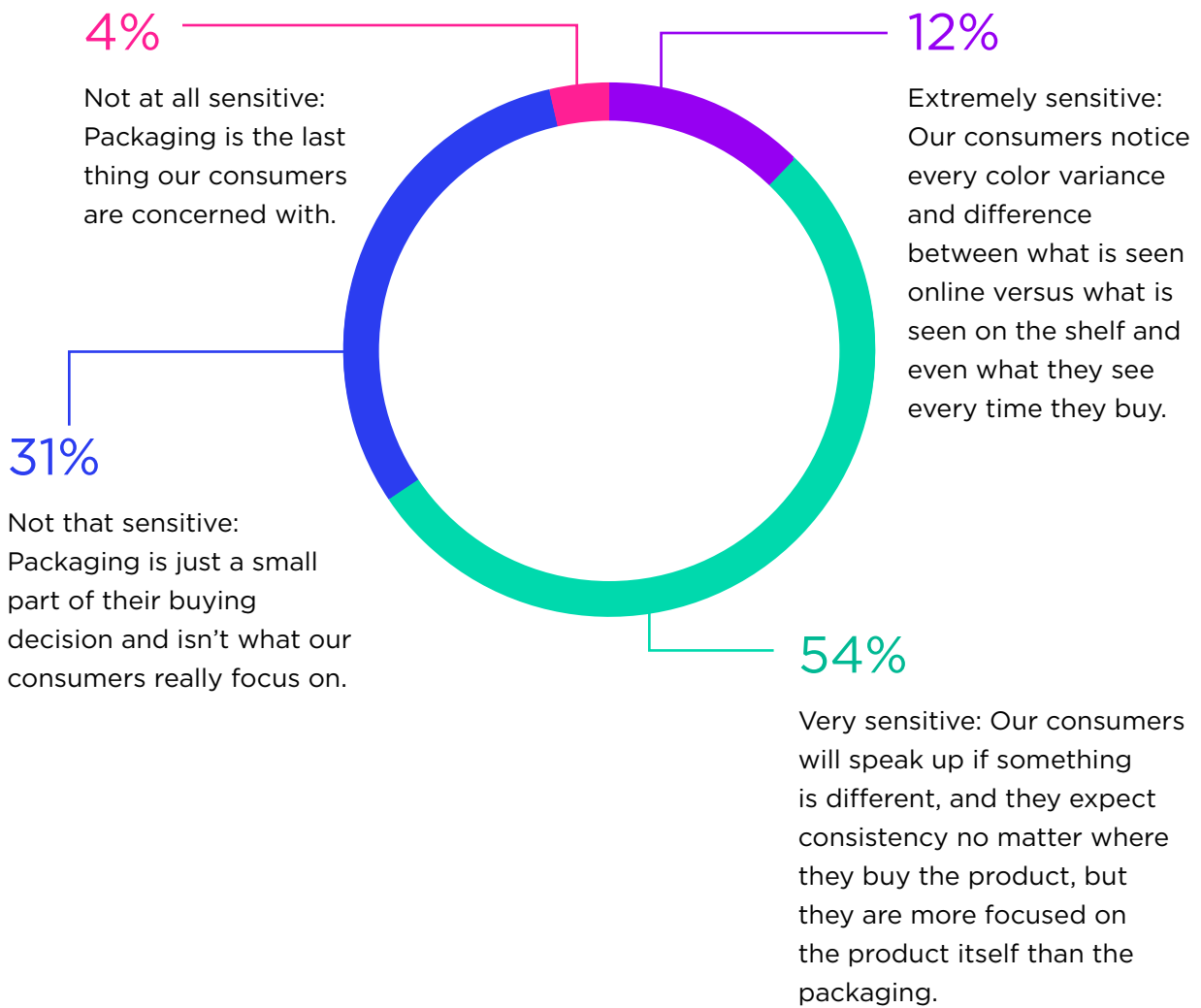
**9. What is the primary constraint to your ability to quickly respond to retail customer and end consumer feedback, suggestions or complaints about products (including product packaging)?** (Select top three)



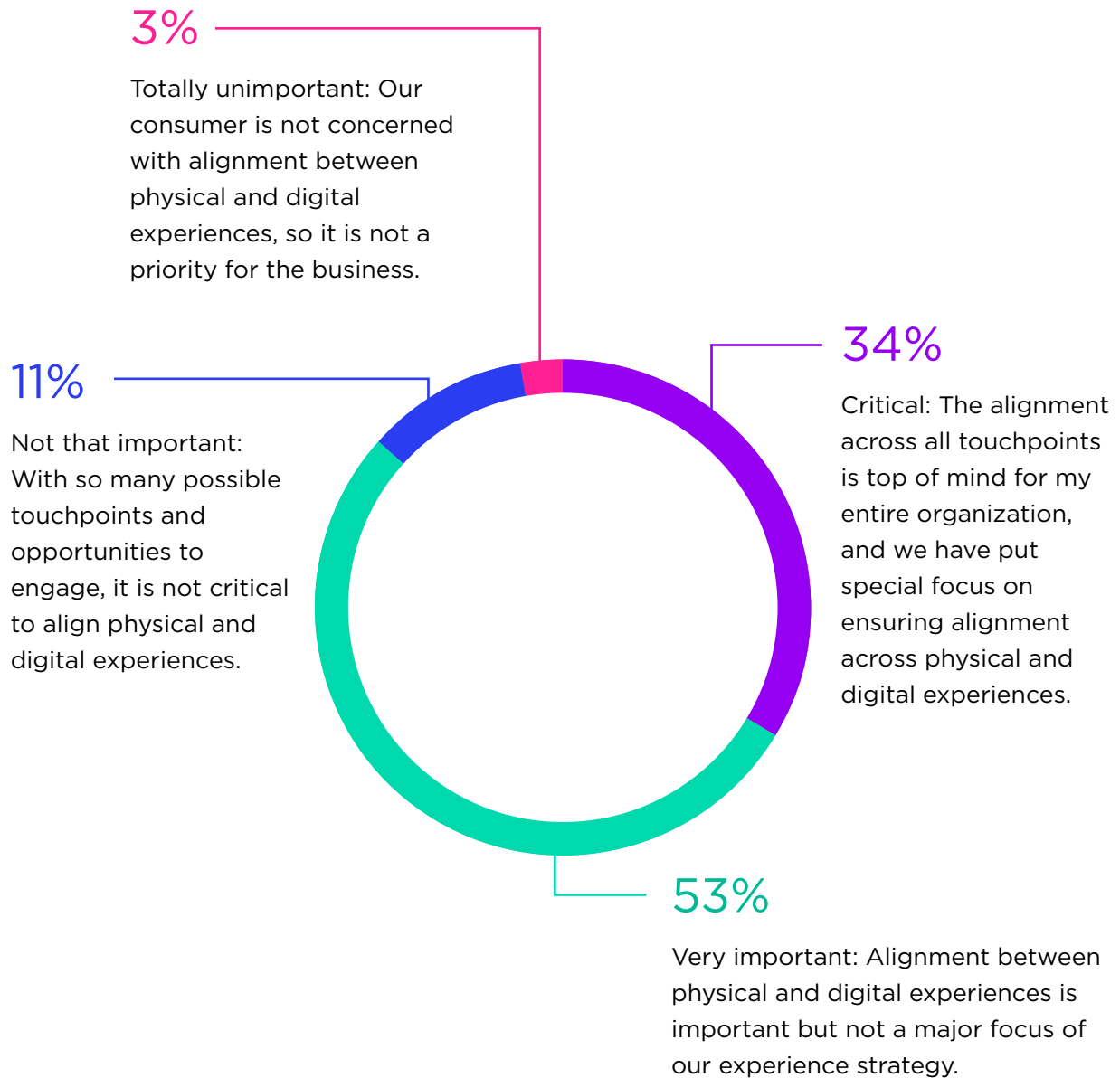
**10. What changes would need to be made, or what stakeholders would need to be involved in order to improve responsiveness to customer feedback, suggestions or complaints about products (including product packaging)?** (Select all that apply.)



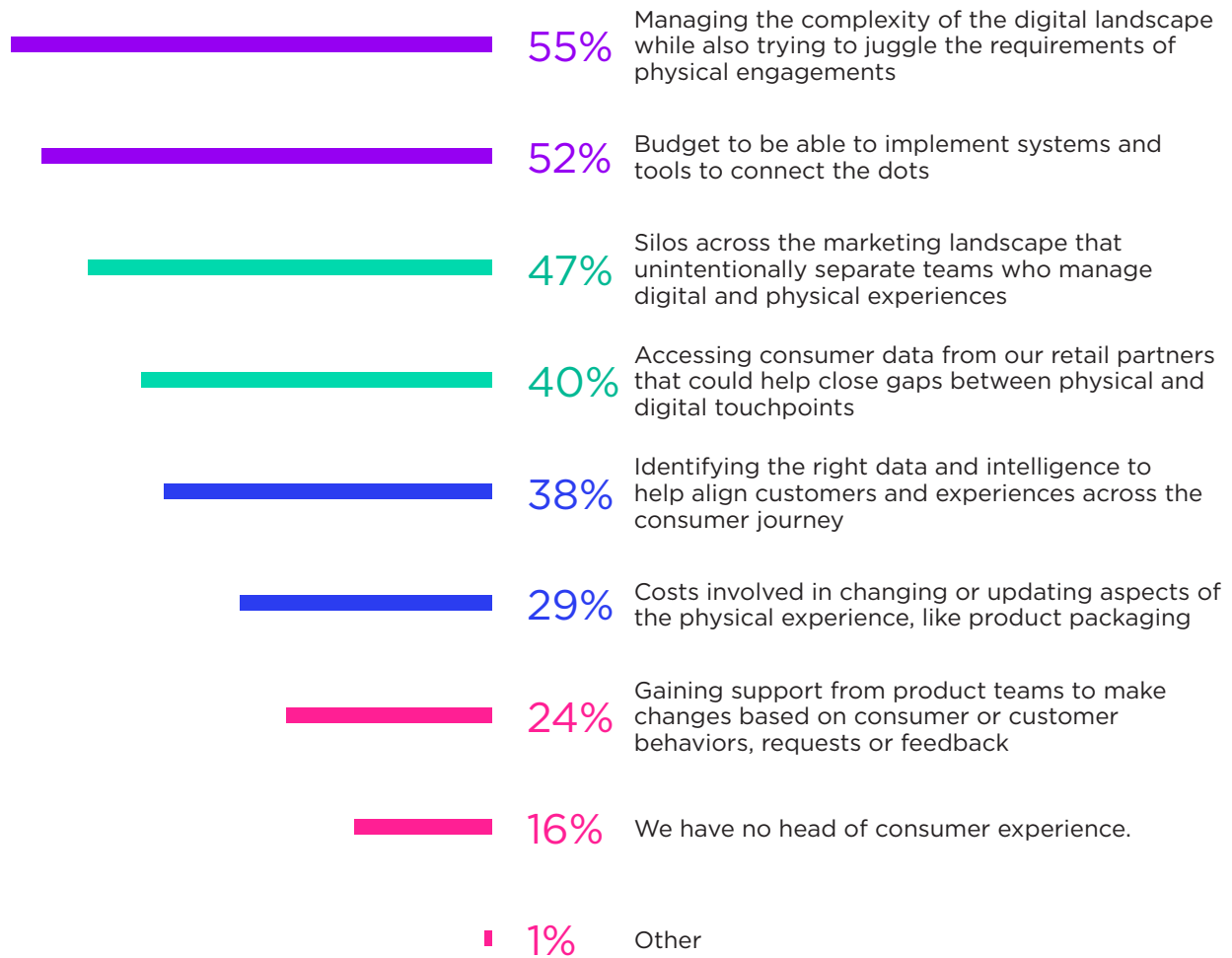
11. How sensitive are your end consumers to product packaging consistency?



**12. How important is a consistent consumer experience between physical (including in-store signage, packaging and printed materials) and digital (including web, mobile, social and e-commerce) brand experiences?**



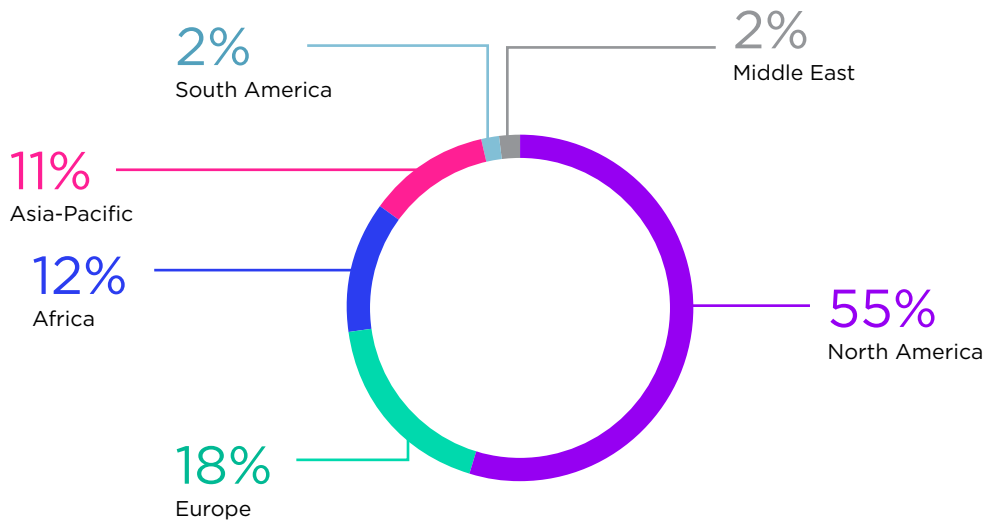
**13. What are the primary obstacles to delivering a consistent consumer experience across physical and digital touchpoints?** (Select all that apply.)



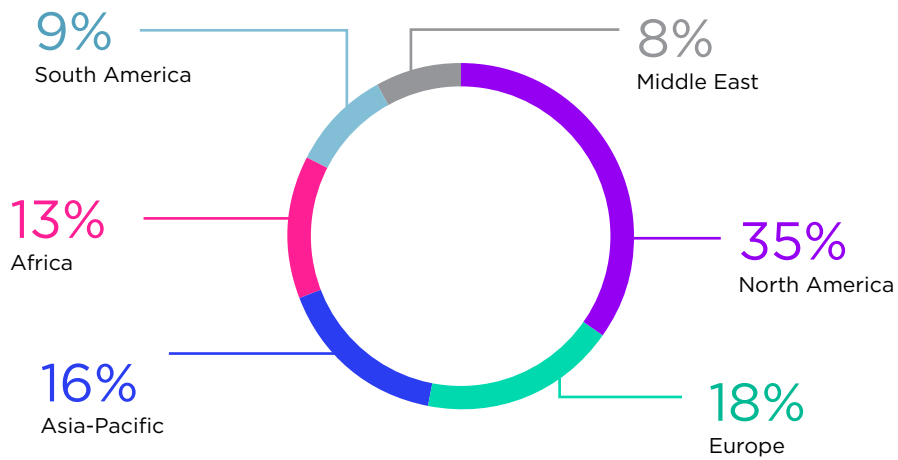


# DEMOGRAPHICS

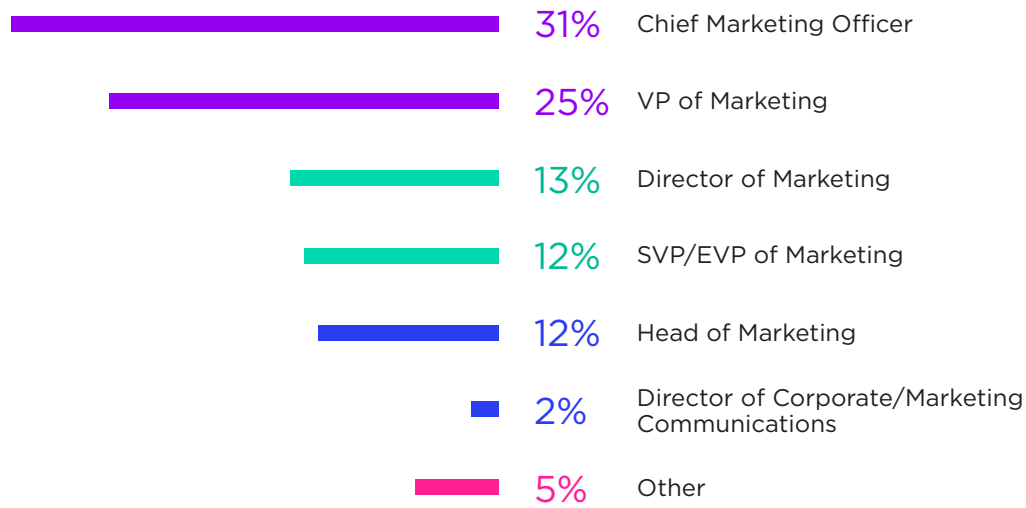
## 14. In which region are you and your marketing team located?



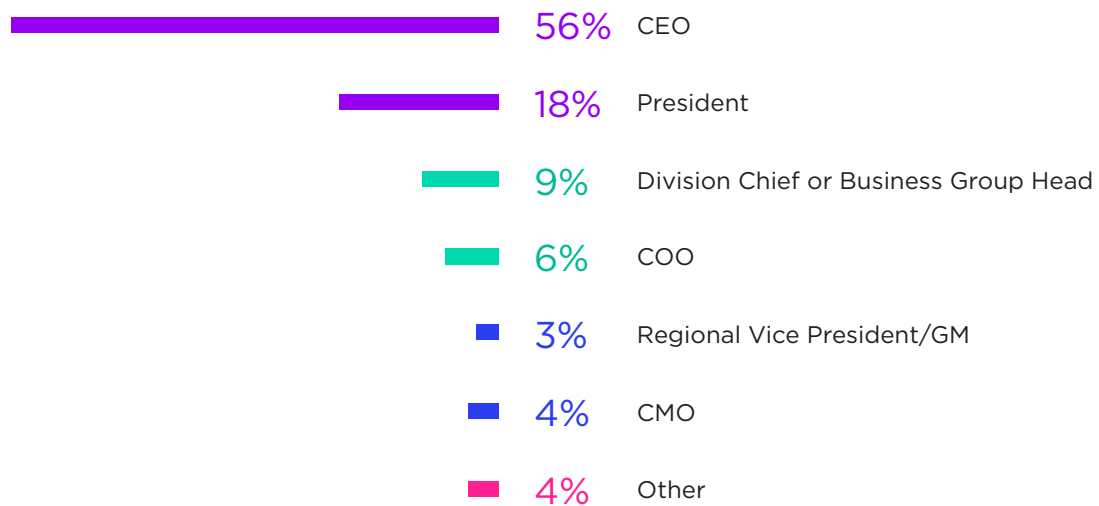
## 15. In which regions does your company operate?



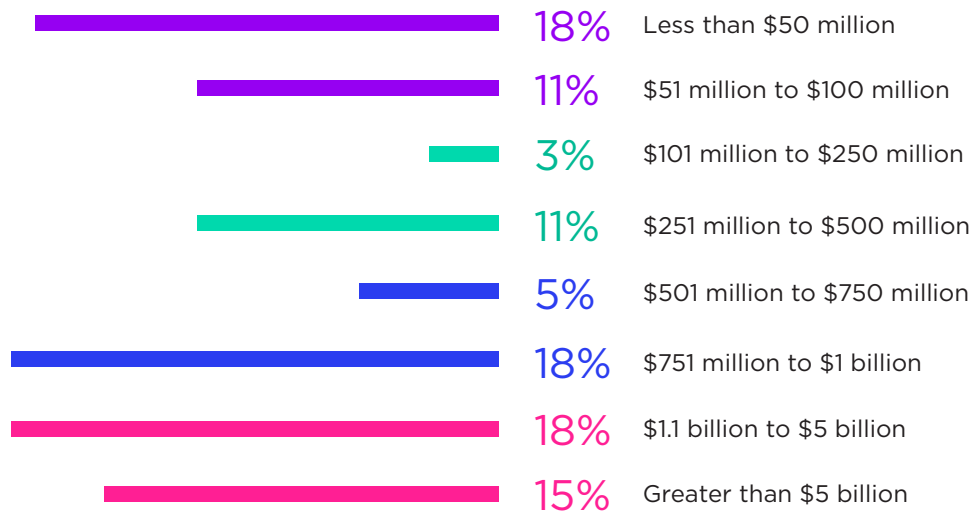
**16. What is your title?**



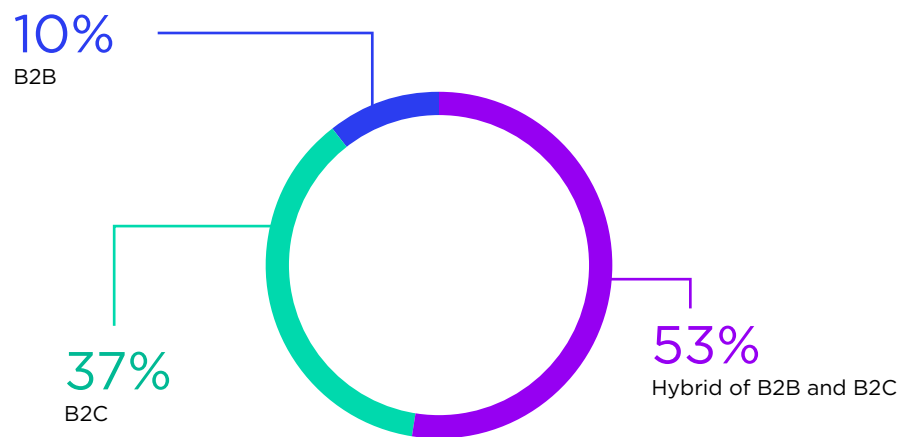
**17. To whom do you report?**



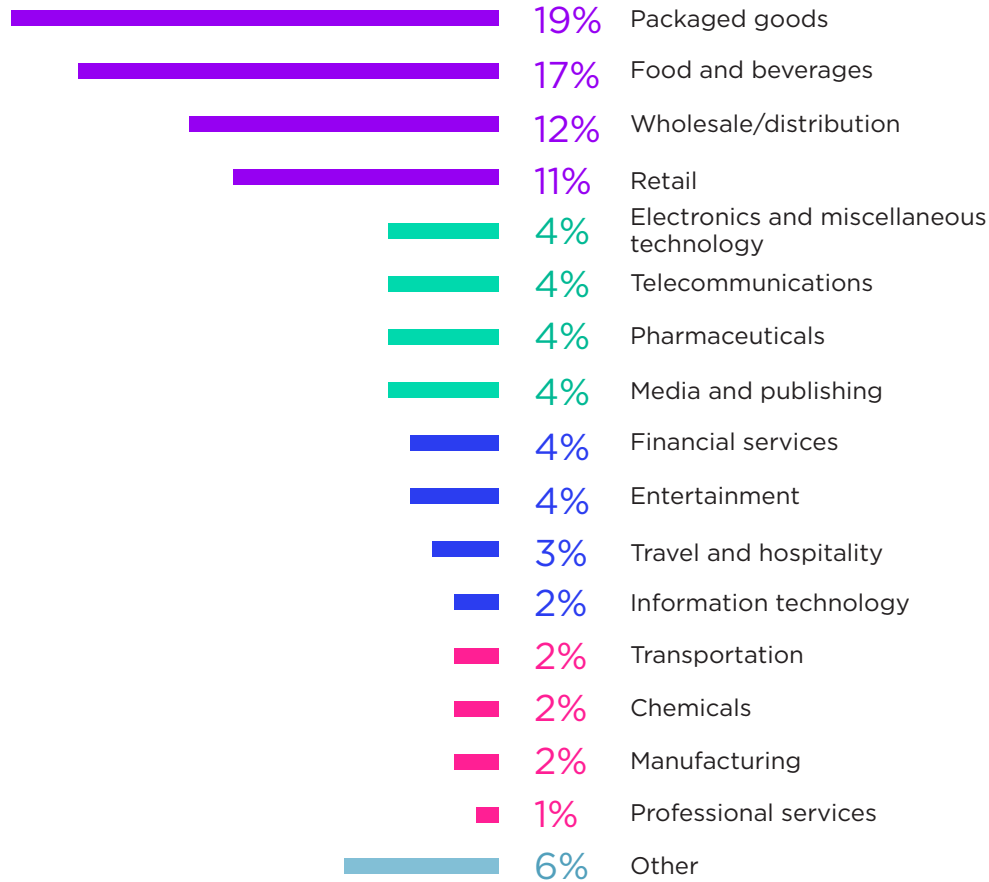
18. How large is your company?



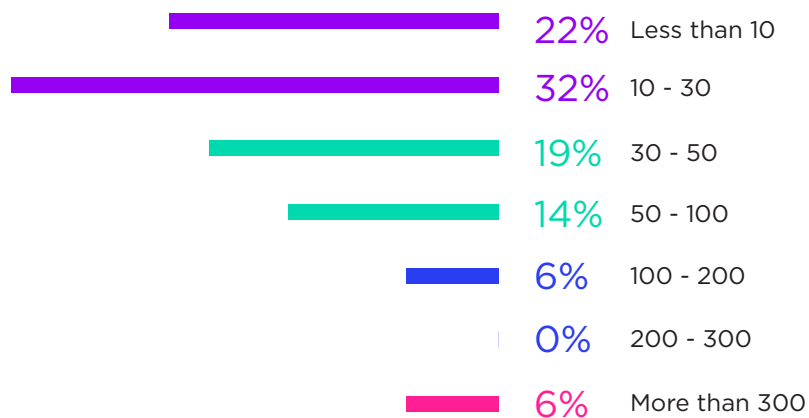
19. What best describes the focus of your business?



**20. What best describes your company's industry sector?**



**21. How large is your global marketing staff/team?**



## ABOUT OUR PARTNERS



Danaher's Product Identification Platform is comprised of [Pantone](#), [MediaBeacon](#), [Esko](#), [X-Rite](#), [AVT](#), [Videojet](#), [Foba](#), [Linx](#) and [Laetus](#), a group of technology companies dedicated to helping customers give products unique identities. Through innovative software and hardware solutions for color formulation and communication, packaging development, management and production, marking and coding, and track and trace, the Product Identification companies are simplifying the packaging value chain in some way for 90 percent of consumer products sold at retail around the world.

### PANTONE®

[Pantone](#), a wholly owned subsidiary of X-Rite Inc., enables color-critical decisions, from inspiration to realization, for brands and manufacturers. Over 10 million designers and producers around the world employ Pantone products and services to communicate through color and control consistency across various materials and finishes. Visit us at [www.pantone.com](http://www.pantone.com).



For more than 20 years, [MediaBeacon](#) has been committed to delivering best-in-class Digital Asset Management (DAM). Through partnerships with our customers, we empower them to deliver their vision globally, from concept to consumer. Our Digital and Marketing Asset Management solution enables this through powerful workflows, best-in-class asset management, and analytics for both digital and physical assets. We are passionate about our team, who realizes that our customers' success is our success. Visit us at [www.mediabeacon.com](http://www.mediabeacon.com).



[Esko](#) helps its customers to make the best packaging for billions of consumers. Its software and hardware product portfolio supports and manages the packaging and print processes for brand owners, retailers, designers, pre-media and trade shops, packaging manufacturers and converters. For 9 out of 10 retail packages, Esko solutions are used in packaging management, asset management, artwork creation, structural design, prepress, 3D visualization, flexo plate making, workflow automation, quality assurance, sample-making, palletization, supply chain collaboration and/or the production of signage and displays. Learn more at [www.esko.com](http://www.esko.com).



[X-Rite](#) Inc. is a global leader in the science and technology of color and appearance. X-Rite offers a full range of solutions used by manufacturers, retailers, printers, photographers and graphic design houses to achieve precise management and communication of color and appearance throughout their processes. X-Rite products and services are recognized standards in the printing, packaging, photography, graphic design, video, automotive, paints, plastics, textiles and medical industries. Visit us at [www.xrite.com](http://www.xrite.com).



[AVT](#) is the global leader in print process control, quality assurance and press control for the packaging, label and commercial print industries. Backed by state-of-the-art technology and field-proven solutions, more than 7,000 AVT systems are installed at customer sites worldwide. AVT is headquartered in Hod-Hasharon, Israel, with sales, marketing and support offices in the United States, Europe and China. Visit us at [www.avt-inc.com](http://www.avt-inc.com).

## MEDIA AND AFFILIATES



PR Newswire is the premier global provider of multimedia platforms that enable marketers, corporate communicators, sustainability officers, public affairs and investor relations officers to leverage content to engage with all of their key audiences. Having pioneered the commercial news distribution industry 60 years ago, PR Newswire provides end-to-end solutions to produce, optimize and target content—from rich media to online video and multimedia—and then distribute content and measure results across traditional, digital, mobile and social channels. Combining the world’s largest multi-channel, multi-cultural content distribution and optimization network with comprehensive workflow tools and platforms, PR Newswire enables the world’s enterprises to engage opportunity everywhere it exists. PR Newswire serves tens of thousands of clients from offices in the Americas, Europe, the Middle East, Africa and Asia-Pacific, and it is a UBM plc company. To learn more, visit [www.prnewswire.com](http://www.prnewswire.com).



For a long time, the only people with access to Qualtrics survey software were our closest friends and a bunch of Scott’s MBA students. It was our research clients who pushed us to open up the system and gave us the feedback needed to make it both the easiest to use and most sophisticated research suite on the market. Learn more at [www.qualtrics.com](http://www.qualtrics.com).

## ABOUT THE CMO COUNCIL



The Chief Marketing Officer (CMO) Council is the only global network of executives specifically dedicated to high-level knowledge exchange, thought leadership and personal relationship building among senior corporate marketing leaders and brand decision makers across a wide range of global industries. The CMO Council's 12,500-plus members control more than \$500 billion in aggregated annual marketing expenditures and run complex, distributed marketing and sales operations worldwide. In total, the CMO Council and its strategic interest communities include more than 35,000 global executives in more than 110 countries covering multiple industries, segments and markets. Regional chapters and advisory boards are active in the Americas, Europe, Asia Pacific, Middle East, India and Africa. The council's strategic interest groups include the Coalition to Leverage and Optimize Sales Effectiveness (CLOSE), Mobile Relationship Marketing (MRM) Strategies, LoyaltyLeaders.org, CMOCIOAlign.org, Marketing Supply Chain Institute, Customer Experience Board, Digital Marketing Performance Institute, GeoBranding Center and the Forum to Advance the Mobile Experience (FAME). For more information, visit the CMO Council at [www.cmocouncil.org](http://www.cmocouncil.org).