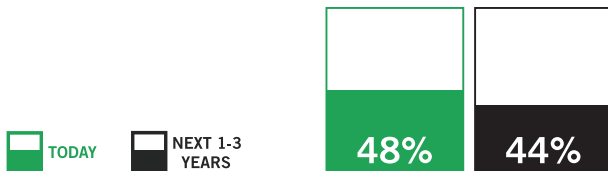


COMPLEXITY AND FRAGMENTATION ARE THE MOST DISRUPTIVE FORCES ON MARKETING

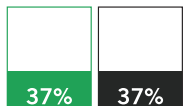
TOP DISRUPTIVE FORCES

FORCES DEEMED SIGNIFICANTLY DISRUPTIVE TO MORE THAN 1 IN 4 MARKETERS WORKING IN BOTH B2B AND B2C

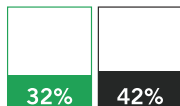
COMPLEXITY AND FRAGMENTATION OF MARKETING



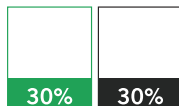
PACE OF NEW TECHNOLOGY



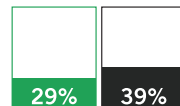
MOBILE



COMPETITIVE THREATS FROM EXISTING COMPETITORS WHO ARE MORE AGILE/NIMBLER



BIG DATA AND ADVANCED ANALYTICS



MARKETERS SEE MOBILE'S IMPACT GROWING AND ARE INCREASING INVESTMENTS

TOP 5 AREAS RECEIVING INCREASED INVESTMENT ACCORDING TO MARKETERS IN BOTH B2B AND B2C



85%
MOBILE

INVESTMENT INCREASES

B-TO-B

74%

B-TO-C

93%



83%
**NEED FOR CONTENT
AND NEW CUSTOMER
EXPERIENCES**



78%
**BIG DATA AND
ADVANCED ANALYTICS**



78%
**CONSUMER EXPECTATION
FOR PERSONALIZED/
RELEVANT EXPERIENCES**



74%
**PACE OF NEW
TECHNOLOGY**

ALMOST THREE IN FOUR CMOs SHIFTING FROM MATRIXED TO NETWORKED ORG STRUCTURE WITHIN NEXT THREE YEARS

ORGANIZATIONAL STRUCTURES ACCORDING TO CMOs



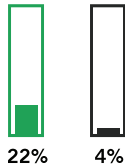
TODAY



NEXT 1-3
YEARS

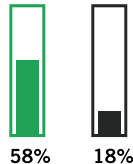
COMMAND AND CONTROL:

DIRECTIVES ARE TOP DOWN AND
FUNCTIONS OPERATE IN SILOS.
WE COLLABORATE BUT NOT
EFFECTIVELY



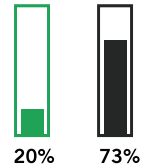
MATRIXED:

ORGANIZATIONAL SILOS EXIST,
INDIVIDUALS HAVE DOTTED LINE
RESPONSIBILITIES ACROSS SILOS,
BUT CONFLICTS AND RESOURCE
CONSTRAINTS EXIST



NETWORKED:

CROSS-FUNCTIONAL TEAMS
COME TOGETHER FOR SPECIFIC
PROJECTS UNDER A COMMON
VISION, WITH CLEAR TIMELINES
AND KPIs



THREE IN FOUR MARKETERS SEE DATA ANALYTICS AT HEART OF MOST IMPORTANT BUSINESS CAPABILITIES

CAPABILITIES TO RESPOND TO MARKET DISRUPTIONS ACCORDING TO TOTAL MARKETERS



**THE ANALYTICS CAPABILITIES
TO MEASURE MARKETING
EFFECTIVENESS/ROI**



**THE ABILITY TO MAKE
DATA-INFLUENCED DECISIONS**



**DEVELOPING CONTENT AND
EXPERIENCES ACROSS THE ENTIRE
CUSTOMER JOURNEY**



**DELIVERING RELEVANT,
PERSONALIZED CUSTOMER
EXPERIENCE**



**ABILITY TO DELIVER PERSONALIZED
CONTENT AND EXPERIENCES**



**TRAINING AND SKILLS
DEVELOPMENT**

FEW MARKETERS SAY THEY HAVE A “CLEARLY DEFINED CUSTOMER JOURNEY”

AGREEMENT AMONG TOTAL MARKETERS

TODAY

50%

SOMEWHAT/
STRONGLY AGREE

1-3 YEARS

77%

SOMEWHAT/
STRONGLY AGREE