LEAP

2018 EUROPEAN USER CONFERENCE

A practical application of digital transformation

ICON plc

Presenter

DavidGreen
ICON plc
@davidcgreen
www.david.green

Salesforce
- Profiled as 'Customer Success story'

Twitter
- Profiled in two 'Success Story' case studies

Forrester
- Profiled as 'global best practice' for Digital Customer Experience Governance
- Cited in several Digital Marketing reports

Web Globalization Report Card
- KPMG and Deloitte 'best professional services websites' when I worked at each respectively

ITSMA
- Two times winner of Marketing Excellence awards

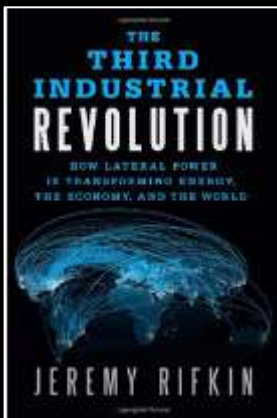Winner of Content Marketing Association Award
Other awards for social media marketing

A digital world.

Global Digitisation > Industrial Revolution

Digitisation is impacting business, the economy and society

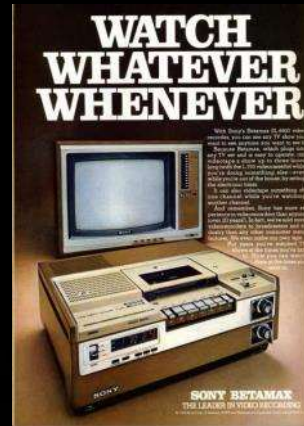Digital transformation is the most important strategic challenge facing business leaders.

One third of the US economy can be attributed to some form of digital capital, skills or intermediate goods and services - that's $6 trillion!

Estimated $0.5 trillion contribution to US GDP growth by 2020 through an optimal combination of digital adjustments to skills, capital and other accelerators.
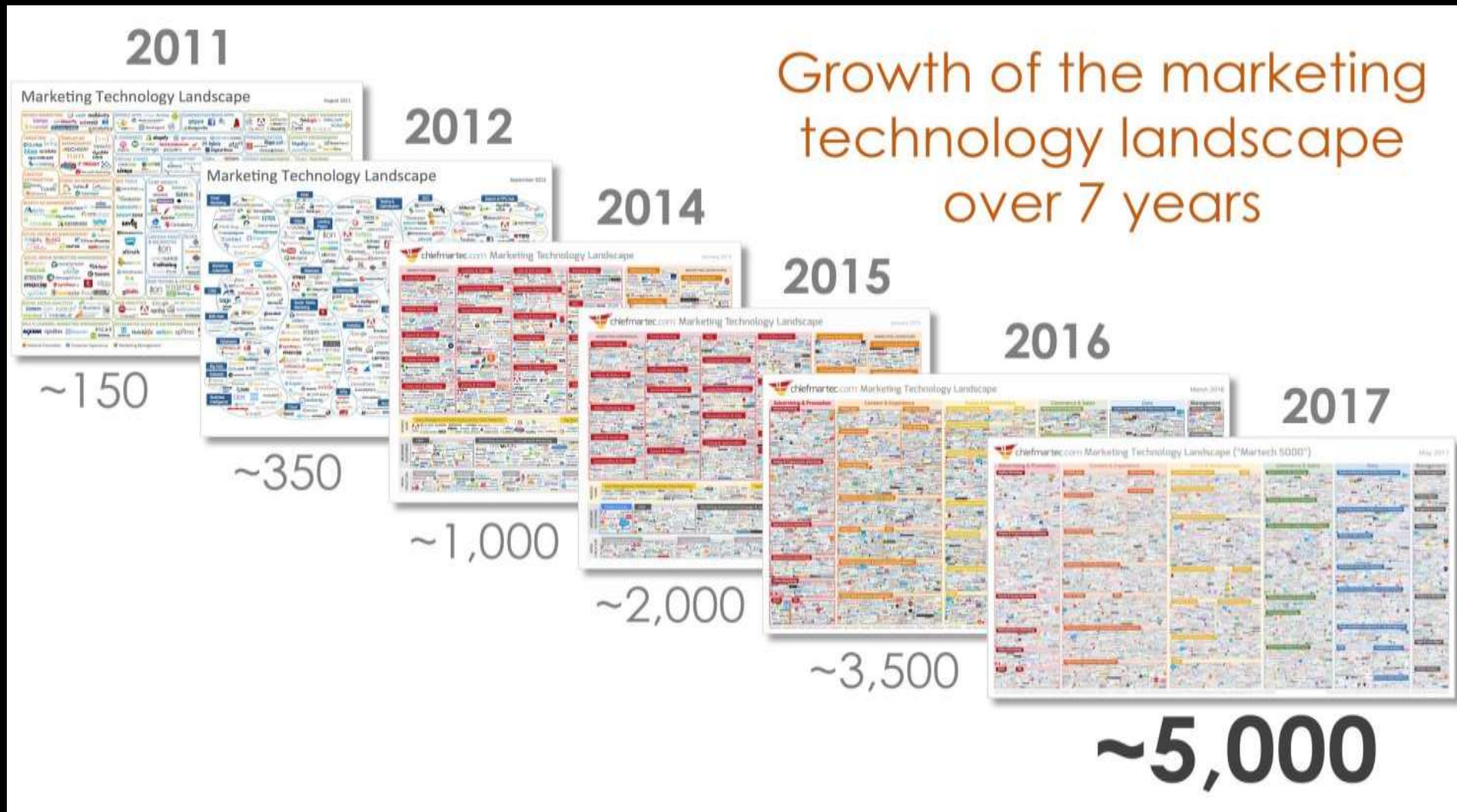
Redundant technology

Digital disruption is accelerating..

Growth of the marketing technology landscape over 7 years

2011 — ~150
2012 — ~350
2014 — ~1,000
2015 — ~2,000
2016 — ~3,500
2017 — ~5,000

Organisational responses

Business model

Products and services

Operating model

Marketing, Sales, Customer Service

Most organisations now have a solid digital foundation but challenge is to drive transformation coherently to drive growth

But wide variation across industries as well as organizational level of digital maturity

The need for real-time analytics, means that information management capabilities underpin digital transformation

Digital disruption is affecting every aspect of business

Organizations need to take a holistic view of digital impact – not just sales/marketing distribution channels.

Bottom line impact:

20% contribution from digital sales

36% contribution from cost savings

Digital maturity = business performance

"The higher a company's level of digital maturity, the better its financial performance is likely to be."

26%
more profitable

12%
higher market cap

9%
more revenue from existing assets

"CEOs and other senior executives are increasingly engaged as their companies step up efforts to build digital enterprises."

Characteristics of Organizational Digital Maturity

- Led by Executive Sponsor
- Effective organizational governance
- Clear digital strategy
- Digital is recognized as a professional discipline within the organisation
- Consistent brand and user experience across digital properties
- Organizationally defined standards, documentation and processes
- Global common technology toolset
- Clear visibility on aggregate activity, performance or expenditure
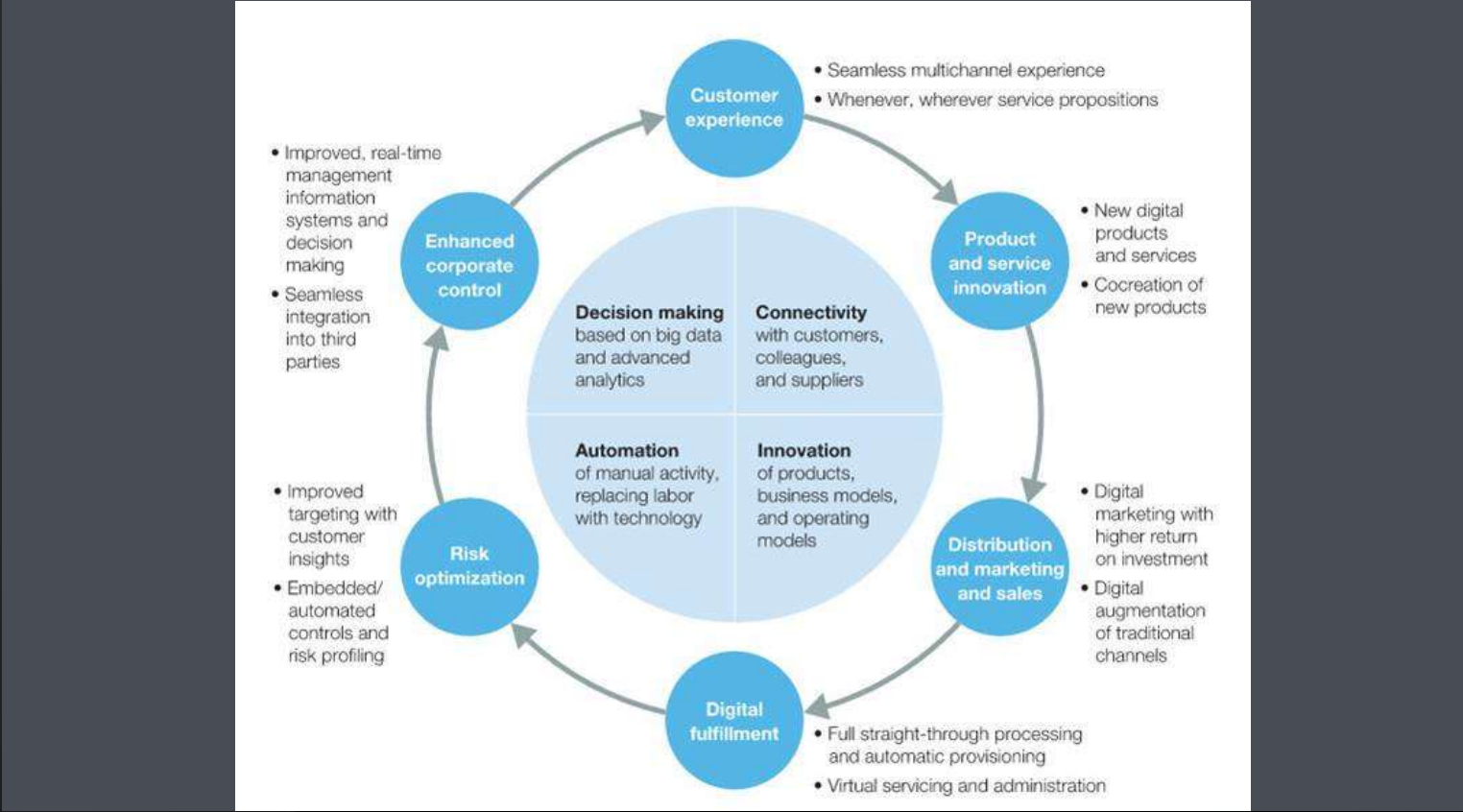
Who is driving digital transformation?

CIO

- Need to transition from being a service provider to shaping the strategic future of the company.

- "Don't measure me on cost or traditional IT metrics, but on the metrics of the business," said Jim Fowler, CIO of GE Capital

CMO

- Marketing has fundamentally changed.

- Need to understand who the customer, and what the customer journey is. Brand and consistent, frictionless customer experiences are becoming ever more important – 'The Age of the customer'.

- Increasingly leading expenditure on business technology.

CDO

- Chief Digital/Data Officer - A sort of hybrid role – generally regarding as transitory and not existing in 5 years – however creation of such roles continues to grow.

Digital governance

In large, complex organisations, effective governance framework can manage tensions of accountability vs autonomy…

Brand

Corporate strategy

Accountability   Autonomy

Business units

Country localization
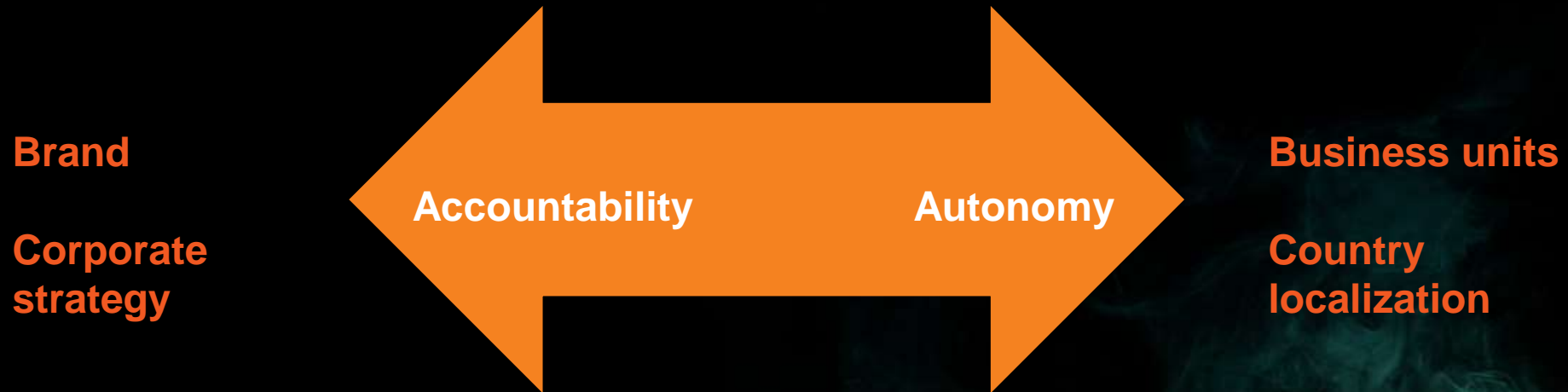
..whilst ensuring global consistency and alignment, quality and innovation

Digital governance framework

Strategic

Executive leadership

Business line & country leadership

Digital subject matter experts

Tactical

Executive Sponsor

Steering Group

Implementation Working Group

Digital policies

Digital operations team

Digital marketing	IT

Digital standards

Governance framework is the decision making mechanism to specify formal processes and guidelines to reduce risk and liability of a poor digital presence, whilst achieving organizational and audience goals.

Editorial Committee	Metrics and evaluation	Operational performance	Platform development	Country and business unit feedback	Competitor intelligence	Other relevant org. governance structures e.g. risk, security, legal
Content impact reports	Management reports	Executive scorecard	Roadmap and enhancements	Internal conference calls	Digital developments	

Change management and large scale business transformation

Change management is a structured approach to transitioning individuals, teams, and organizations from a current state to a desired future state.

Business Intelligence

7 out of 10
change efforts that are critical to organizational success, fail to achieve their intended results.

Gartner

For major corporate IT systems:

28% are abandoned before completion

46% are behind schedule or over budget

80% are not used in the way they were intended to be or not used at all six months after installation.

Impact of the Business Transformation

Change Management response

- Business case & vision for change
- Change readiness assessment
- Workforce impact assessments
- Stakeholder engagement map
- Communications objectives and plan
- Training curriculum
- Leadership engagement
- Scorecard/metrics/ROI

Prepare for change

Manage for change

Solidify change

Digital change at ICON

Speed to market trumps solution complexity.

About ICON

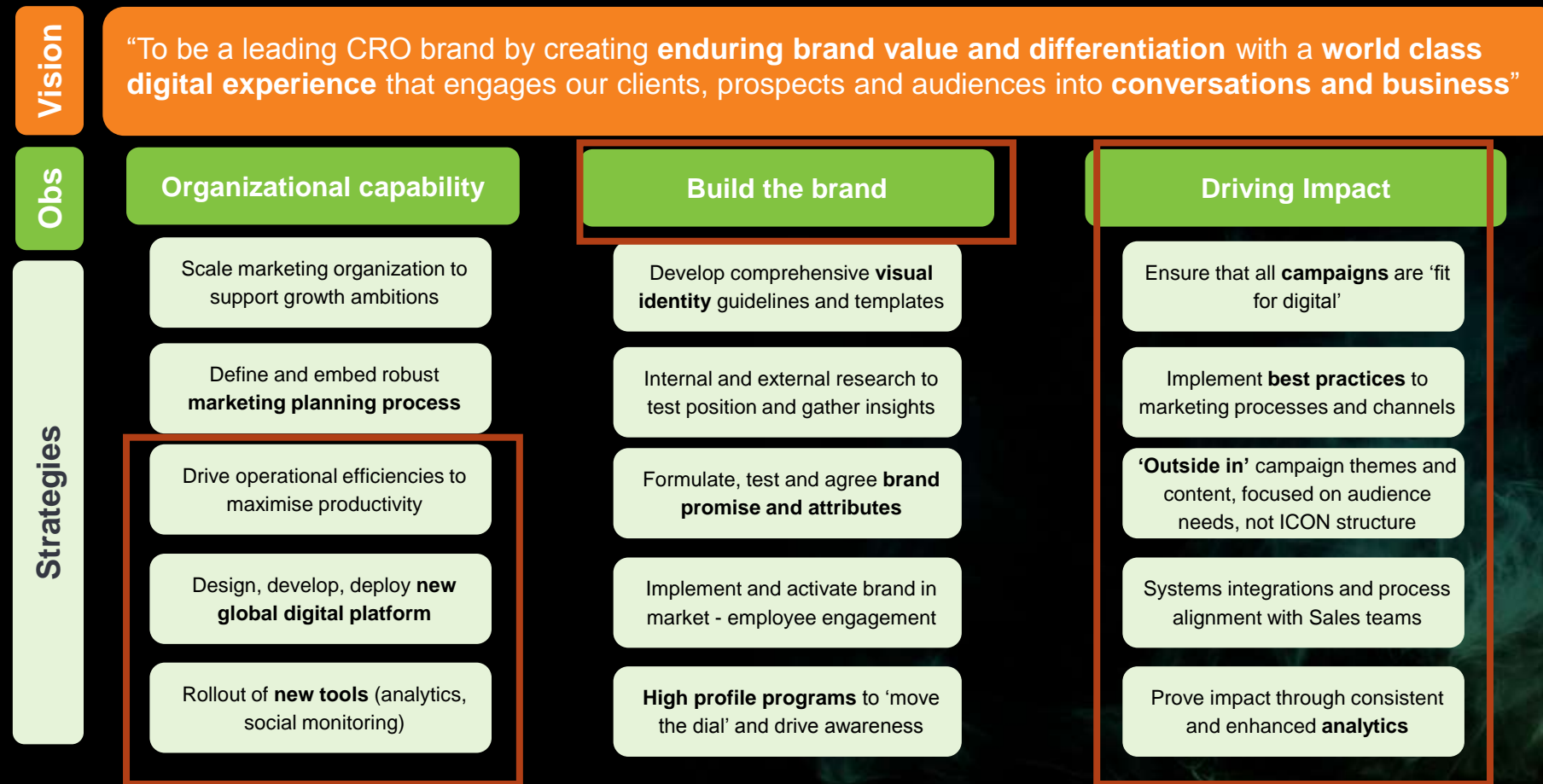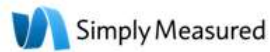- Global provider of outsourced drug development and commercialisation solutions and services to pharmaceutical, biotechnology, medical device, and government and public health organisations.

- ICON's award-winning study execution capabilities have led to the approval of 18 of the world's top 20 best-selling drugs.

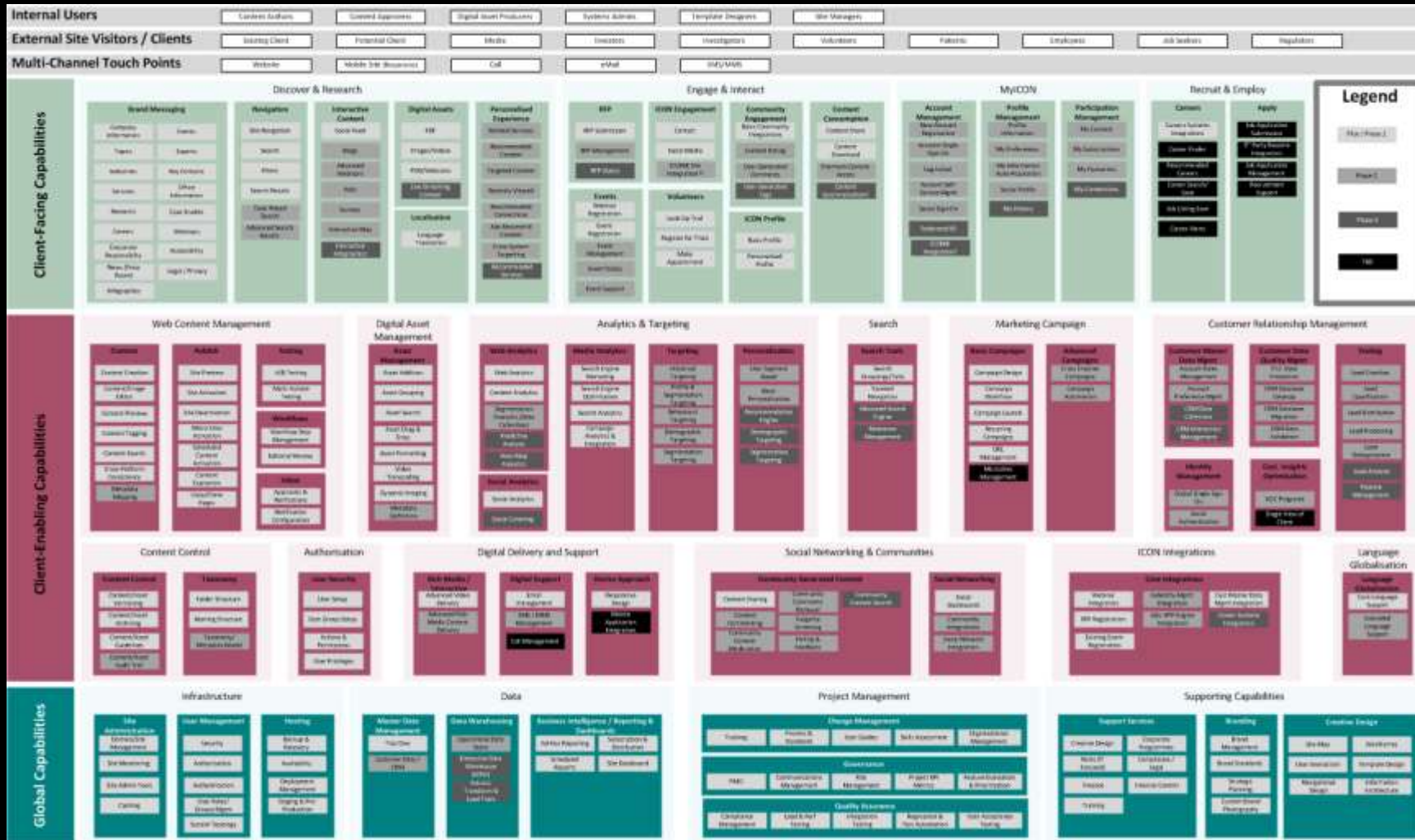- Operates from 97 locations in 38 countries and has approximately 13,380 employees. $1.7B revenues in 2017
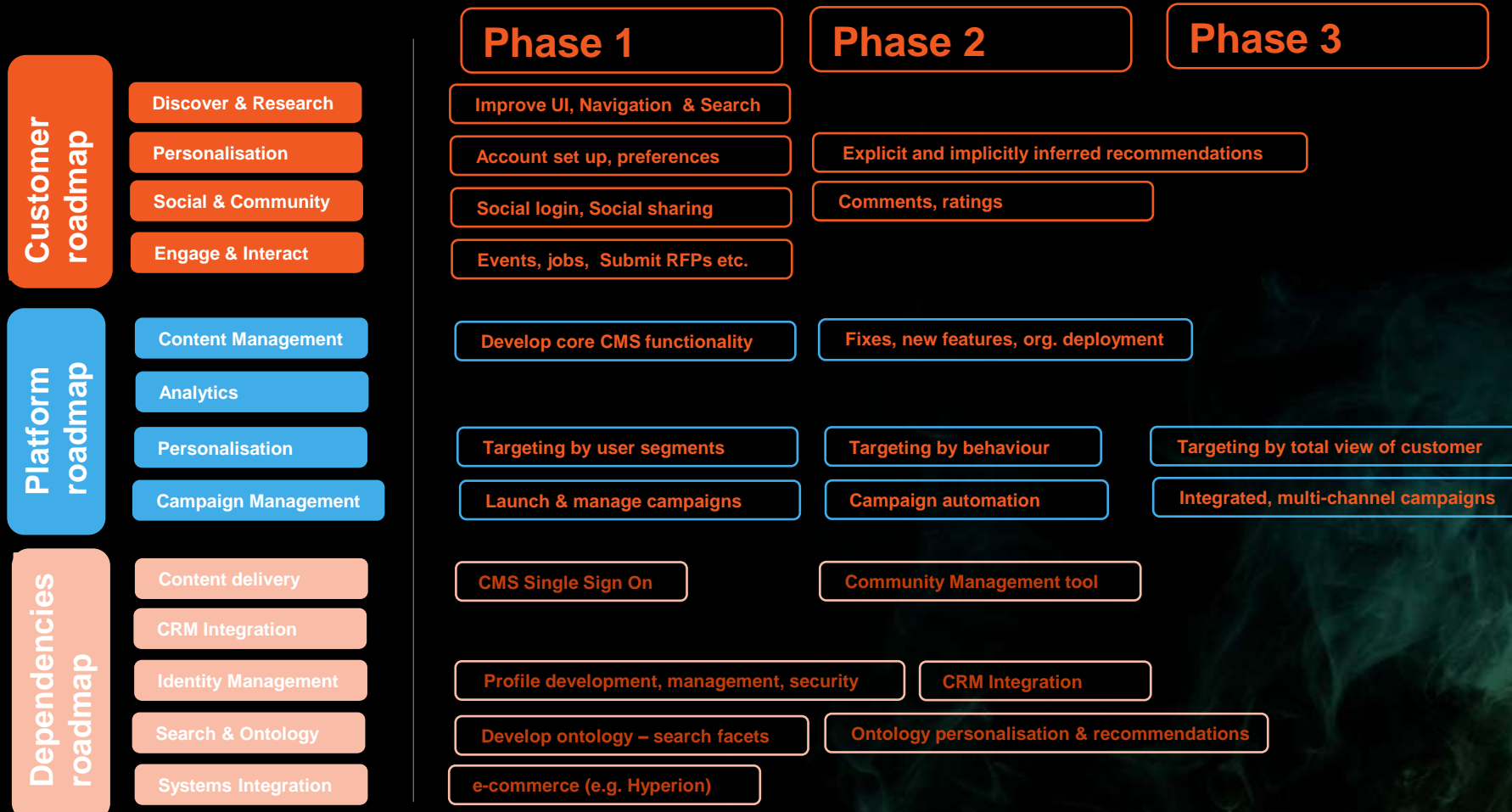
Marketing vision, objectives and strategies

Vision

"To be a leading CRO brand by creating **enduring brand value and differentiation** with a **world class digital experience** that engages our clients, prospects and audiences into **conversations and business**"

Obs

Organizational capability	Build the brand	Driving Impact

Strategies

Organizational capability	Build the brand	Driving Impact
Scale marketing organization to support growth ambitions	Develop comprehensive **visual identity** guidelines and templates	Ensure that all **campaigns** are 'fit for digital'
Define and embed robust **marketing planning process**	Internal and external research to test position and gather insights	Implement **best practices** to marketing processes and channels
Drive operational efficiencies to maximise productivity	Formulate, test and agree **brand promise and attributes**	**'Outside in'** campaign themes and content, focused on audience needs, not ICON structure
Design, develop, deploy **new global digital platform**	Implement and activate brand in market - employee engagement	Systems integrations and process alignment with Sales teams
Rollout of **new tools** (analytics, social monitoring)	**High profile programs** to 'move the dial' and drive awareness	Prove impact through consistent and enhanced **analytics**

Built to a clear roadmap..

Develop a digital roadmap..

Phase 1	Phase 2	Phase 3

Customer roadmap

- Discover & Research
- Personalisation
- Social & Community
- Engage & Interact

Phase 1	Phase 2	Phase 3
Improve UI, Navigation & Search		
Account set up, preferences	Explicit and implicitly inferred recommendations	
Social login, Social sharing	Comments, ratings	
Events, jobs, Submit RFPs etc.		

Platform roadmap

- Content Management
- Analytics
- Personalisation
- Campaign Management

Phase 1	Phase 2	Phase 3
Develop core CMS functionality	Fixes, new features, org. deployment	
Targeting by user segments	Targeting by behaviour	Targeting by total view of customer
Launch & manage campaigns	Campaign automation	Integrated, multi-channel campaigns

Dependencies roadmap

- Content delivery
- CRM Integration
- Identity Management
- Search & Ontology
- Systems Integration

Phase 1	Phase 2	Phase 3
CMS Single Sign On	Community Management tool	
Profile development, management, security	CRM Integration	
Develop ontology – search facets	Ontology personalisation & recommendations	
e-commerce (e.g. Hyperion)		

..that delivers new customer and organisational capabilities

Customer facing capabilities

Discover and Research
- Brand messaging
- Navigation
- Interactive content
- Digital assets

Personalisation
- Personalised experience
- Account management
- Profile management

Engage and interact
- Community engagement
- Content consumption

Customer enabling capabilities

Content Management
- Content publishing
- Content control
- Digital asset management
- Meta data mapping

Social and community
- Community generated content
- Social network integration

Analytics and Targeting
- Web analytics
- Social analytics
- Campaign analytics
- Personalization
- Targeting

Customer Insight
- Customer data management
- Identity management
- Lead management

Internal users   **External audiences**   **Channel touch points**

Speed to market principles

- Spend time to think about architecture upfront – technical and information
- Take a risk-managed approach…avoid big-bangs
- Sprint based development with immediate UAT per sprint release to mitigate risk of launch delays - test as the solution is being built!
- Prioritize development activities so that pilot business units can begin adoption activities ASAP e.g. content migration and curation
- Empower system users with intuitive methods and flexible tools
- Begin user documentation immediately and iteratively update per release
- Multiple parallel work streams – so communication and strong project management is critical
- Increase platform ROI by minimizing software customization
- Enable creation of outside-in visitor experiences

Our marketing technology ecosystem:

Seamless cloud based operations

Real time dashboards

Algorithmic lead pre-qualification

Database governance

We live in the age of the customer..
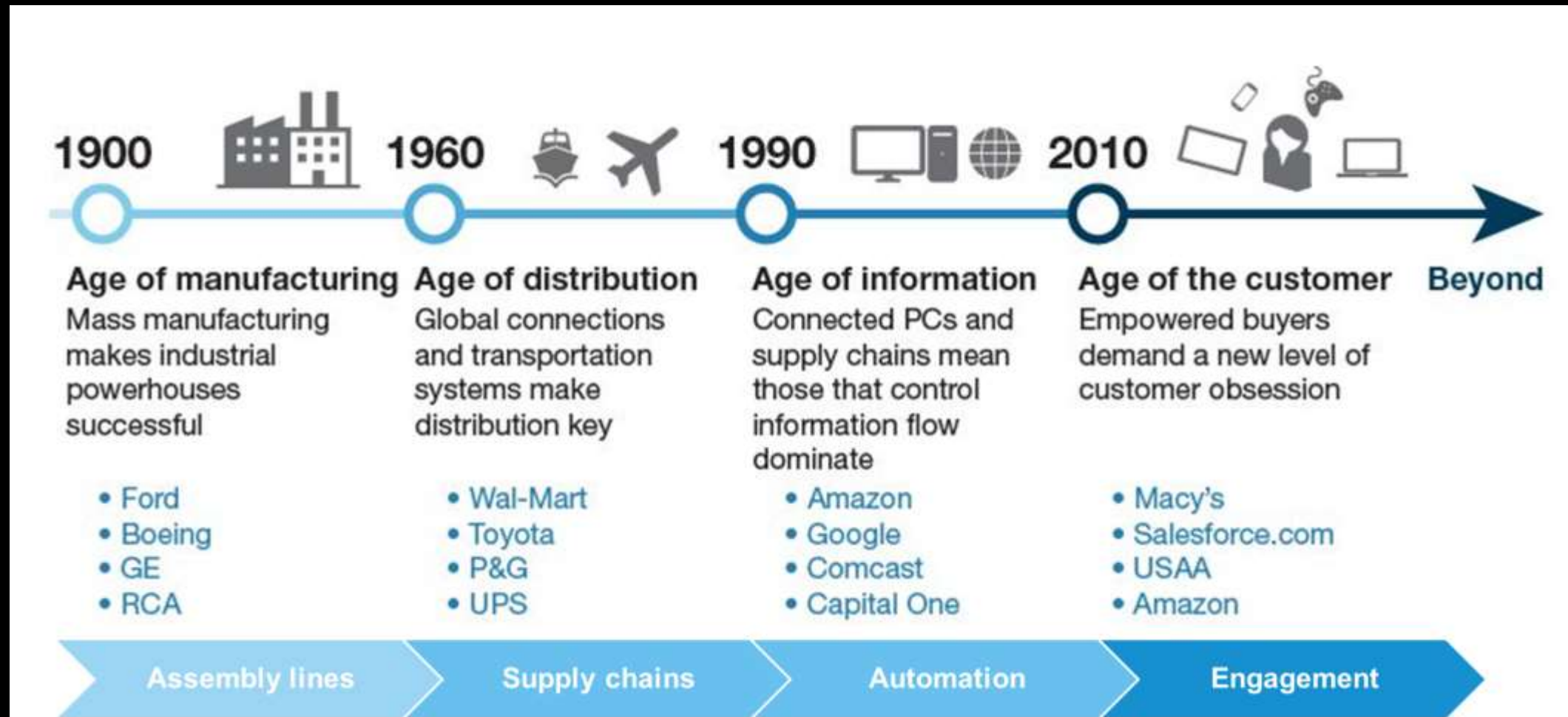
1900 — Age of manufacturing
Mass manufacturing makes industrial powerhouses successful
- Ford
- Boeing
- GE
- RCA

1960 — Age of distribution
Global connections and transportation systems make distribution key
- Wal-Mart
- Toyota
- P&G
- UPS

1990 — Age of information
Connected PCs and supply chains mean those that control information flow dominate
- Amazon
- Google
- Comcast
- Capital One

2010 — Age of the customer
Empowered buyers demand a new level of customer obsession
- Macy's
- Salesforce.com
- USAA
- Amazon

Beyond

Assembly lines   Supply chains   Automation   Engagement

Don't call us – we'll call you… or not

57%

Learn | Define Needs | Assess Options | Make Decision

Result
The "1 of 3 Problem"
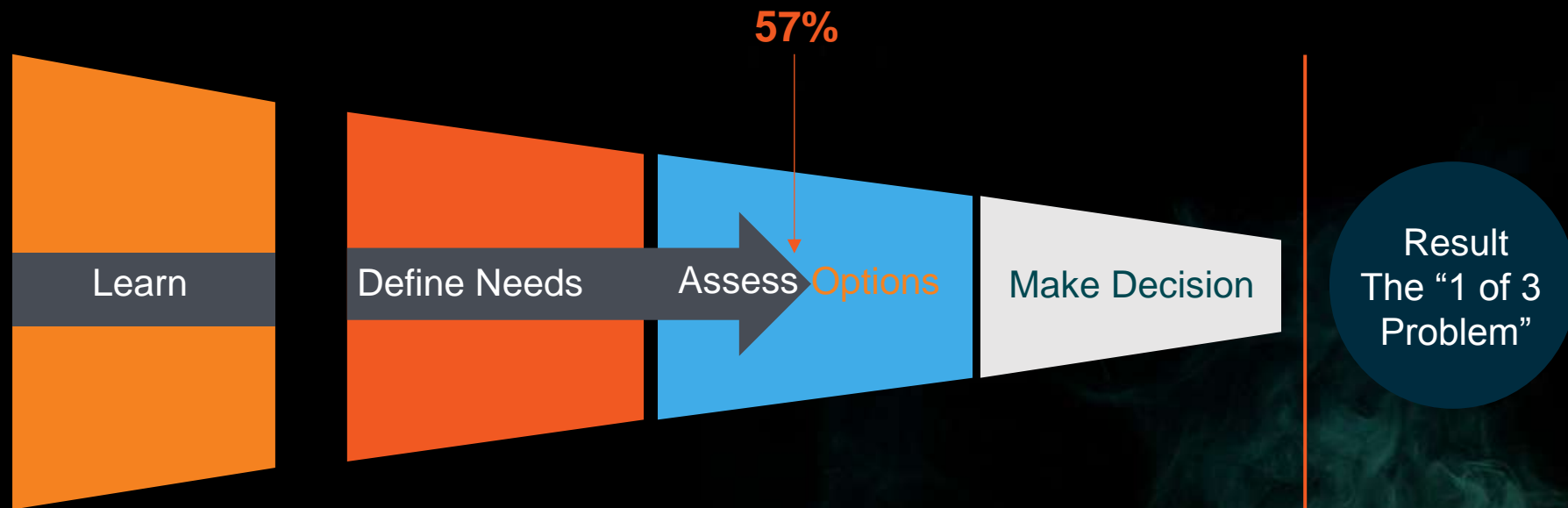
Customers are delaying contact with Sales and increasingly looking to non-supplier sources to guide purchase decisions

The customer buying journey and messaging

BRAND

MARKETING

SALES

Needs Recognition

Customer defines what they need from a CRO

Research

Customer explores to see who can fill those needs

Evaluation

Customer selects a shortlist

Selection

Customer chooses the CRO(s) they want to work with

Delivery

Learn about the problem

Define needs of solution

Assess supplier options

Make decisions

Consensus on the problem

Consensus on the solution

Consensus on the supplier

ICON provides content focused on:

Building Awareness & Gain Mindshare

Presenting Credentials Establishing Trust & Consideration

Proving value

Reinforcing Trust Reframing Objections

Win the Sale

Content classified in DAM..
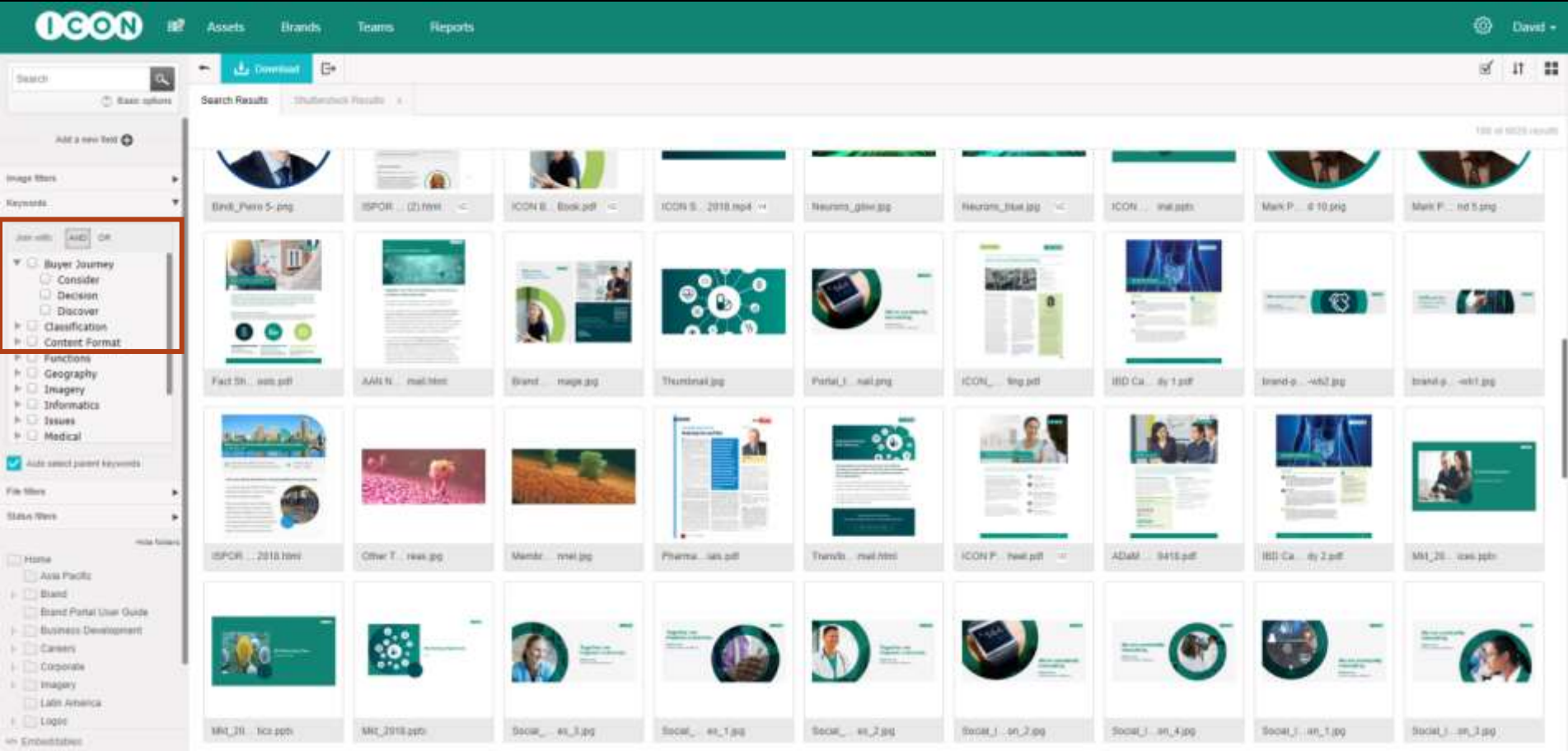
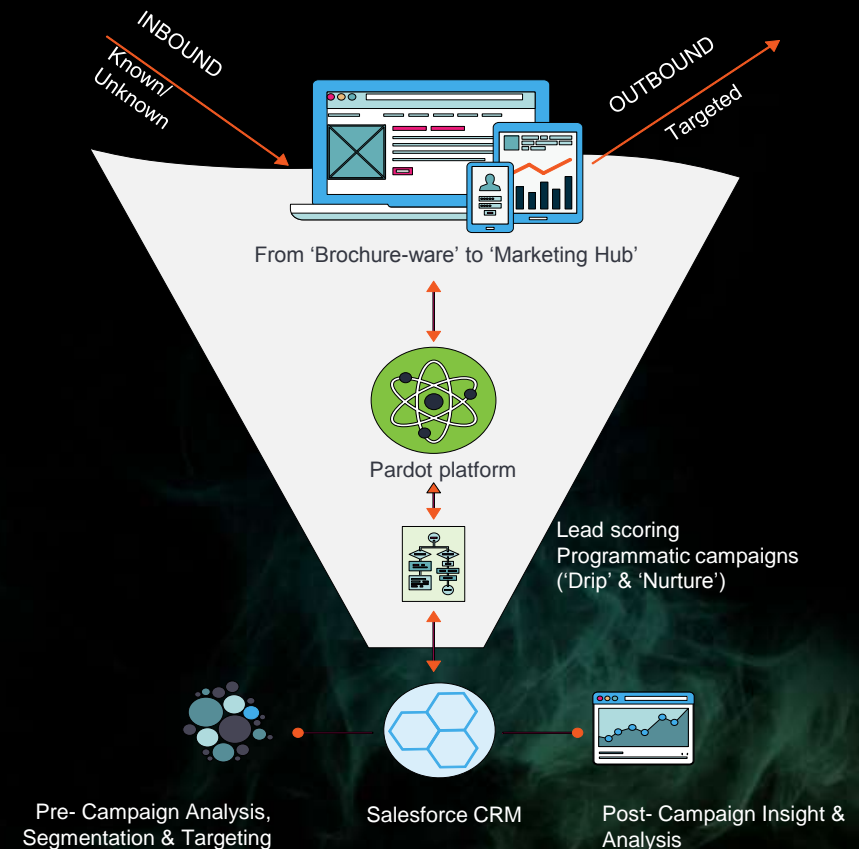# ..feeds through to enterprise brand portal:

..feeds through to marketing automation:

Our digital marketing ecosystem enables us to gather large amounts of data and turn this to actionable insights.
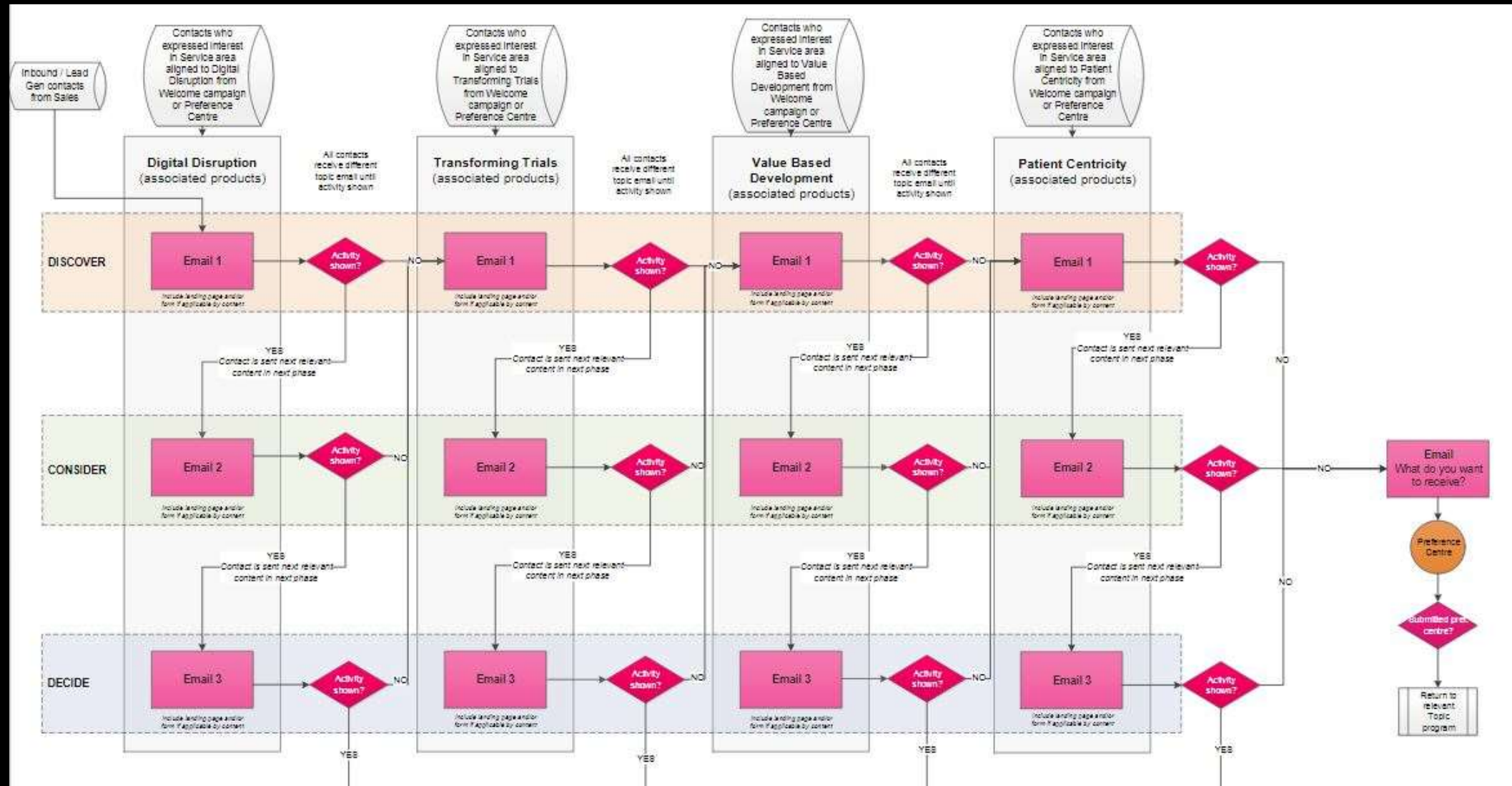
We monitor contacts:
– profiling and behaviour tracking
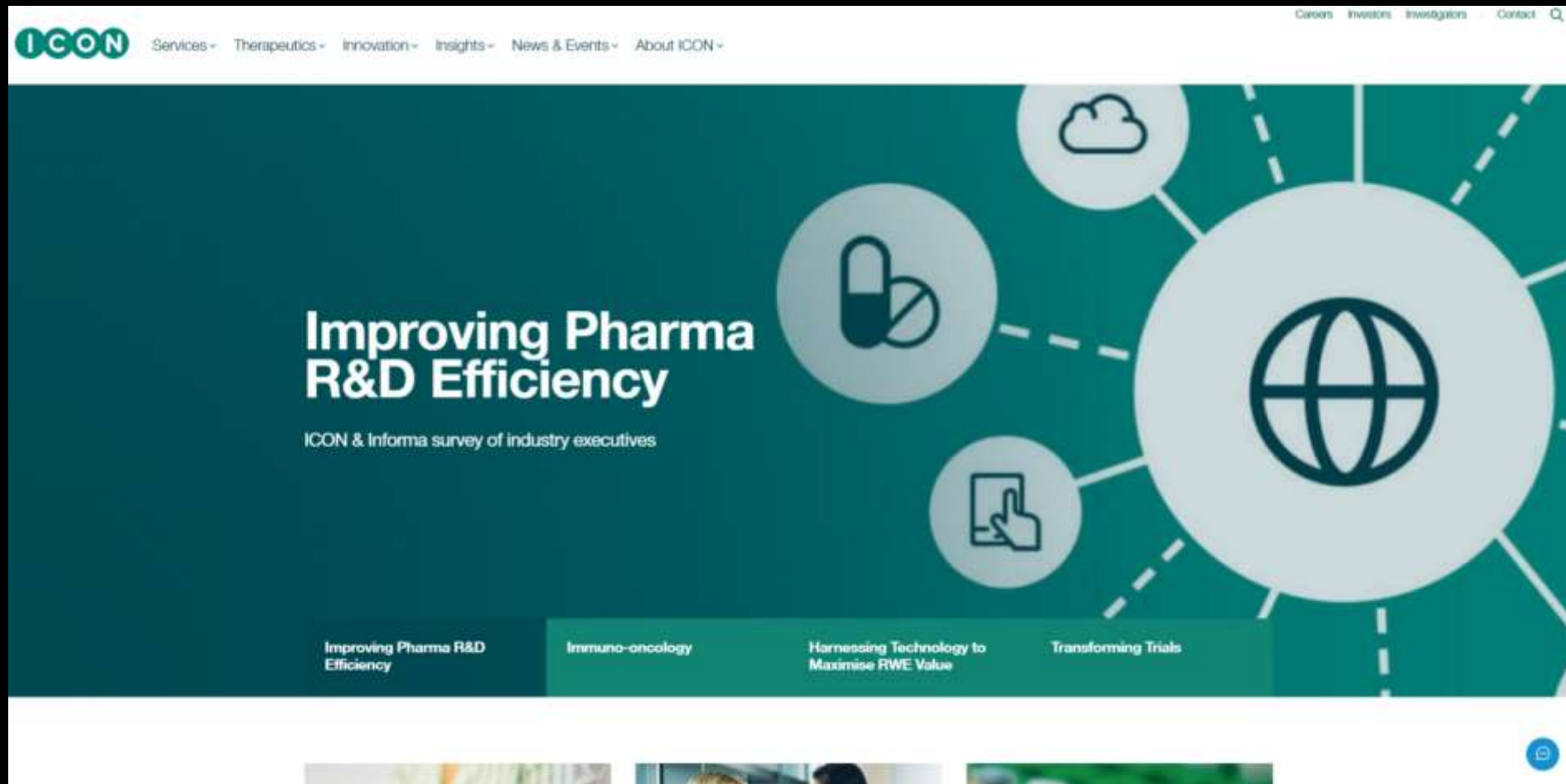– single integrated view of WHO they are and WHAT they do

Front-end preference centre (and other) forms to feed back-end workflows to support micro segmentation and targeting of individual clients and potential leads through targeted content.

INBOUND
Known/Unknown

OUTBOUND
Targeted

From 'Brochure-ware' to 'Marketing Hub'

Pardot platform

Lead scoring
Programmatic campaigns
('Drip' & 'Nurture')

Pre- Campaign Analysis, Segmentation & Targeting

Salesforce CRM

Post- Campaign Insight & Analysis

Example marketing automation workflow

..feeds through to new website

Brand more important in a digital world..

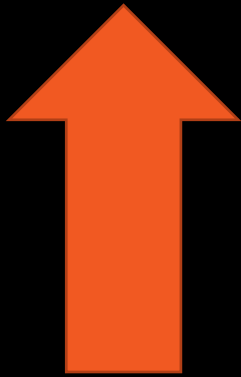" Your brand is what other people say about you when you are not in the room. "

Jeff Bezos, CEO, Amazon
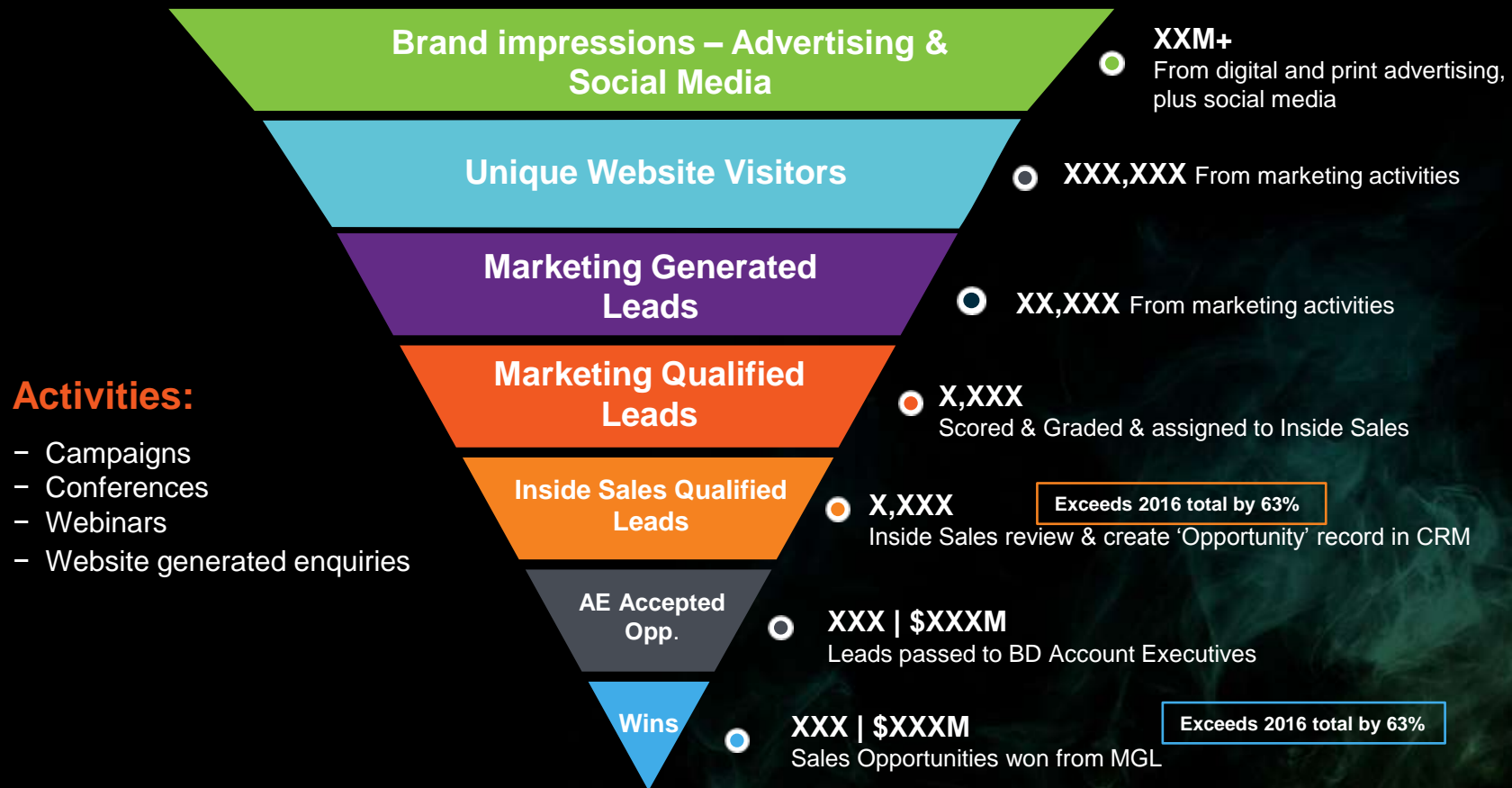
Explosion of channels, content, data..

Information overload

Attention deficit

Proving Marketing ROI

Brand impressions – Advertising & Social Media

XXM+
From digital and print advertising, plus social media

Unique Website Visitors

XXX,XXX From marketing activities

Marketing Generated Leads

XX,XXX From marketing activities

Marketing Qualified Leads

X,XXX
Scored & Graded & assigned to Inside Sales

Activities:

– Campaigns
– Conferences
– Webinars
– Website generated enquiries

Inside Sales Qualified Leads

X,XXX

Exceeds 2016 total by 63%

Inside Sales review & create 'Opportunity' record in CRM

AE Accepted Opp.

XXX | $XXXM
Leads passed to BD Account Executives

Wins

XXX | $XXXM
Sales Opportunities won from MGL

Exceeds 2016 total by 63%

ICON marketing maturation

Inside out
Project ICON service portfolio and org. structure – clients forced to navigate to solution – not intuitive

In and out
Campaigns and content against key client concerns, - but not to scale across all service and therapeutic areas

Outside in
Go-to-market messaging against key client concerns, solution value propositions, benefits

Weak Insights
Little expert opinion expressed

Some Insights
Campaigns ,content and commentary against key client concerns, - but not to scale across all service and therapeutic areas

Rich Insights
Lead market with expert opinion and commentary

Dated
Static publishing / digital afterthought

Detailing
Digital centric approach, implementation of leads nurturing and pilot marketing automation.

Dynamic
Digital centric, email preferences and personalization, marketing automation and leads nurturing

Weak brand
Poorly defined system, inconsistent visual identity

Emerging brand
Robust visual identity system, clear consistency across channels, in-depth research to inform positioning.

Global brand
Robust system, clear articulation of differentiation, driving both employee and buyer behaviours.

2015   **2016**   **2017**

Future of work..

- Digital technologies enable workplace and work process innovation

- Productivity drives from SaaS, process automation toolsets, blockchain..

- Intelligence is growing in the things that surround us all

- Cybersecurity > The Business Value of Trust

- New business models, revenue streams, types of customer relationships and cost structures.. all coalescing to radically change the nature of work

- New leadership behaviours > share, collaborate, iterate and experiment across a value chain.

David Green

David.green@iconplc.com

+353 879235749

LEAP

2018 EUROPEAN USER CONFERENCE