

The Future of Intelligent Marketing Performance

Accenture Song

A roundtable discussion on how marketers face challenges to become more customer-centric and driving growth, while navigating shifting tech, regulatory and consumer behaviors.

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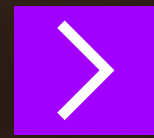
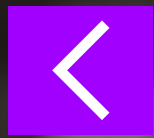
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01

Introduction



01

Welcome from Nina Holdaway

Marketing Managing Director, Accenture Song



Accenture Song is delighted to join forces with tml Partners to host a CMO roundtable discussion on the future of intelligent marketing performance. Here we share the challenges marketers face to be ever-more customer-centric and driving growth, while navigating shifting tech, regulatory and consumer behaviours.

Brands find themselves at a critical juncture, grappling with what can only be described as a relevancy crisis. In the quest for relevance, CMOs are seeking assistance on several critical fronts, including improving the return on investment for marketing technology, unlocking the hidden potential within data for insights and revenue, and delivering content and campaigns that resonate globally, locally, and personally while keeping costs in check.

In today's landscape however change isn't just a buzzword: it's the engine that's propelling the industry into uncharted territories. Retail, for one, is experiencing a revolution of epic proportions. With digital commerce running at full throttle, there's a new star of the show – Retail Media.

Taking centre stage, Retailers are redefining their relationships with brands and suppliers by adopting performance-based pricing models, upending the traditional approach, and leveraging rich loyalty data to target customers with precision.

Retailers are sitting on a colossal amount of transactional and insight data, the customers of which go well into the multi-millions. We're seeing incredible opportunities for retailers to work with brands to maximise their media budgets by gaining unprecedented insights into how their advertising efforts directly impact sales through closed-loop measurement.

This creates a unique opportunity for brands to get to know their customers better and deliver a better customer experience as a result, with personalised advertising that attracts and retains loyal customers. The time is ripe for retailers to disrupt the advertising industry, become a growth engine for brands, and substantially benefit as a result.

Here we give you a backstage pass into our captivating CMO roundtable discussion where intelligent marketing performance is driving data and customer to converge and reshape the future of marketing by redefining the rules of engagement. This new reality is a call to arms for CMOs to rewire their business to orchestrate for growth and customer relevance.

Hosts

Nina Holdaway – Managing Director, Accenture Song

Jess Arthurs – Senior Manager, Accenture Song

Simon Bassett – CEO, tml Partners

Participants

Rob Basinger – MD, Marcus by Goldman Sachs

Jo Button – *Former* Digital Director, Camelot

Dominic Chambers - European Head of Marketing, Genesis Motor Group

Drew Crisp - SVP Digital, Liverpool FC

Sarah del Corral - Global Director, eComm and Digital, Pret

Amanda Jobbins – CMO, Vodafone

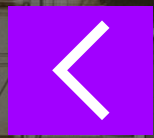
Sidonie Robert-Degove - Global Retail & CRM Director

Claire Sadler – CMO, British Heart Foundation

Simone Williams - Global Digital Director, Cos

2024

Marketing in 2024



TAP

МЕРЕЖА МАГАЗИНІВ та ВЛАСНА КАВ'ЯРНЯ | МОЛОК від фермерського виробництва | МОЛОК ТУРАЛЬНІ ПРОДУКТИ від фермерського виробництва | 8-22

AROM ARO

АМЕРИКАНО 17

КАРД'ІННО 23

Accenture Song



Executive Marketing Recruitment.

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Customers want organisations to both prioritise their data privacy and use their data to improve their experiences

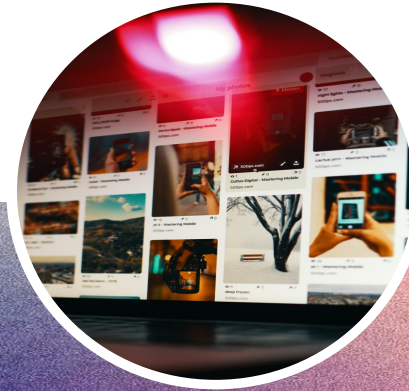
41%



Expect to be personally recognised

Customers expect organisations to respect their privacy while using their data to provide personalised and relevant experiences

51%



Want online experiences to reflect what they like

Customers expect organisations to use their data to enhance and optimise their experiences across all touchpoints

39%



Want messaging to be based on what they are doing right now

Customers also expect transparency and control over how their data is collected, stored, and used by the organisation

Organisations need to harness data to drive the customer lifetime value proposition

“Everything in the past has been about acquiring new customers. But with data it is not just about putting a face to a name. It is about developing a value proposition that creates deeper relationships with existing customers.”

It is more valuable to keep 100 customers and move them further down the funnel than finding 100 new customers.”

Sarah del Corral

Global Director, eCommerce & Digital, Pret A Manger

But marketers face big challenges to become more customer-centric, navigating shifting tech, regulations and consumer behaviors



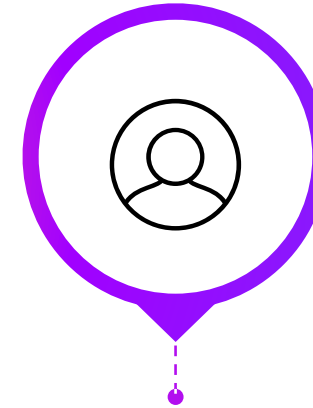
1. MORE USER PRIVACY CONTROLS



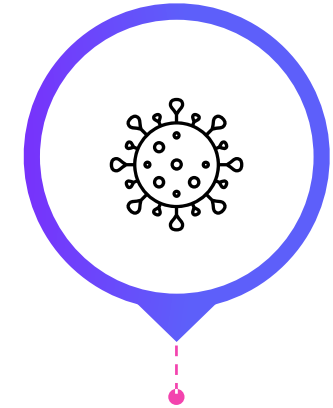
2. EXTERNAL REGULATORY CHANGES



3. BROWSER & APP RESTRICTIONS



4. LACK OF SINGLE VIEW OF THE CUSTOMER



5. SHIFTING MEDIA CONSUMPTION

With various data restrictions being put in place, most noticeably the death of the third-party cookie, there are significant consequences on the paid media industry, and it is becoming harder to understand the end-to-end experience a customer is having with the brand. With the shift in media consumption alongside seeing an explosion of new channels and platforms, it is becoming increasingly challenging to easily find your audience and engage with them meaningfully.

Working with a limited budget

"It costs money to reach people. If you don't have the money then you can't reach people, so you can try and educate people."

Amanda Jobbins

Global Chief Marketing Officer & Director Strategic Partners, Vodafone

"The world of flat budgets forces you to think outside the box. It forces efficiency and optimisation. You also have to stretch the relationships you have with agencies and partners, to squeeze all you can out."

Rob Basinger

Head of Product & Marketing, Marcus by Goldman Sachs UK

A new set of skills required from Marketeers

“The capabilities in the Marketing team have evolved. Previously it was about brand-based marketing and sending emails to everyone. Now it is about data skills, marketing operations and understanding how to orchestrate journeys.”

Drew Crisp

SVP Digital, Liverpool FC

“The biggest challenge is the organisation structure and mindset. It is not just about having the data but being able to access it, set-it up and make sense of it. This impacts talent with new roles and skills required. It also requires a Head of Marketing Operations to be the conduit between finance and marketing.”

Sarah del Corral

Global Director, eCommerce and Digital, Pret A Manger

This is driving material shifts within the Marketing domain, with many reviewing channel strategies, strategic vendors and operating models

Connected Paid, Owned & Earned Experiences

The relationship between Paid, Owned & Earned media is critical as opportunities to connect experiences and drive customers through the funnel yield superior marketing outcomes:

Complex Marketing Domain

Large Global organisations that have experienced high growth (both organic and inorganic) often **operate Adtech & Martech landscapes fraught with complexities**

Right-housing Operations

Assessing the balance between **outsource & in-house** raises questions around the best way to execute campaign strategy, planning and activation.

We see leading data-led marketing organisations exhibiting a number of common characteristics and capabilities

Universal Identification

Brands are steadily taking ownership of proprietary universal IDs to unpin their digital activation and data capabilities

Cloud Infrastructure

Centralised data warehouses in the cloud combining previously disconnected company & marketing data which can be used at multiple end points

Agile and Always On Experimentation

Generating competitive advantage via embracing change, working at speed & having a bias towards decisive action

Seizing the opportunity of data to prove value

“We can always justify budget increases if we can show and improve the lifetime value of a fan. If we can prove that driving a fan through the funnel, they can spend £60 a year instead of £30 a year, then it’s easy. We’ve got a lot of data, but we need to build those models to utilise the huge amounts of data. We want to capture, accurately, spend in the stadium, through to which content they’re viewing, when they’ve come onto our website, whether they’ve opened an article. We have the data, but we need to bring it to life.”

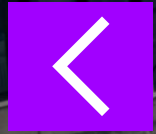
Drew Crisp

SVP Digital, Liverpool FC

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Industry challenges are resulting
in new models emerging:

Introducing Retail Media



03

Introduction

Retail has never changed this fast in history. Digital commerce is accelerating, and consumers are buying online – more than ever before. Consumer behavior has changed significantly and omnichannel is everywhere. Retailers are expanding their digital sales channels, allowing drop shipping, or even becoming an own marketplace platform.

Today, retailers collect terabytes of new data about their customers. To become more customer-centric, retailers must leverage that data to create a 360-degree view of their customers by understanding who they are, what they buy, and what they need.

Building insights on individual behaviour is of tremendous value to create personalised shopping experiences, shorten the decision cycles and improve brand loyalty.

Rich customer profiles can inform business decisions to drive growth by increasing profitability and open the opportunity to build new revenue streams such as data monetization through an advertising business: “retail media”.

Brands, on the other hand, value the unique opportunities retail media offers: They are incorporating this new advertising channel in their marketing mix, in addition to traditional trade marketing spending with retailers.

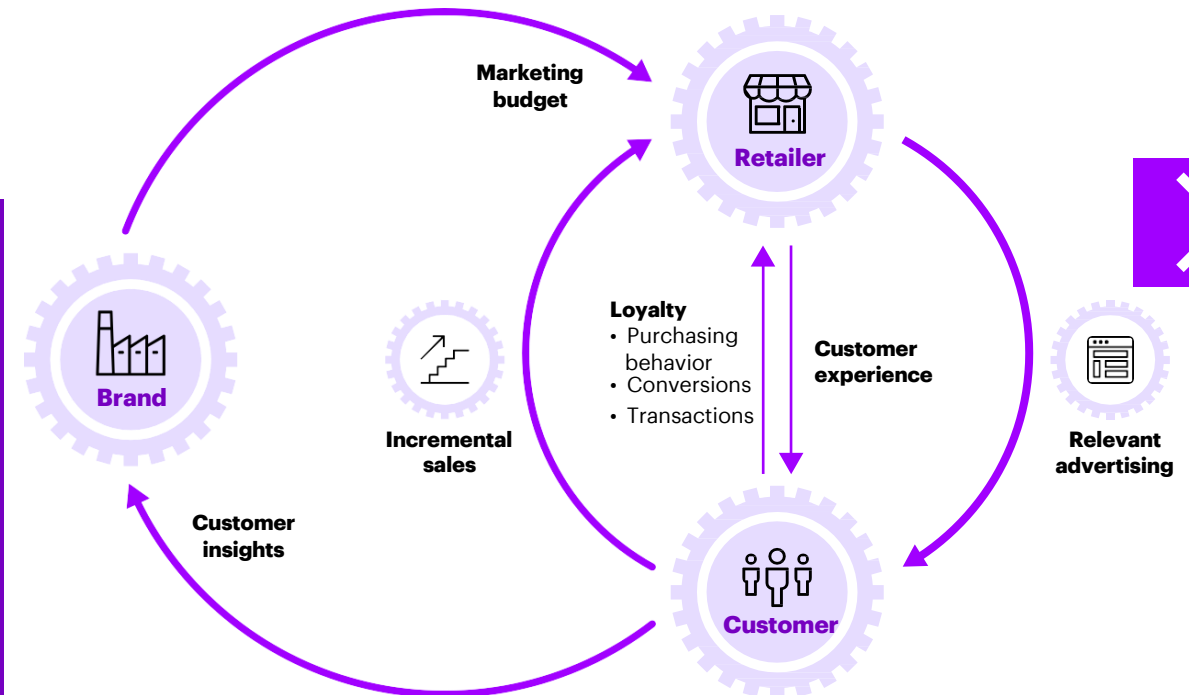
Media becomes an integral part of the retail value chain

While business models today are still linear and sequential between suppliers, retailers and customers – this is about to change. Each partner in the value chain is focused on maximising the profitability of each transaction; tomorrow it will be about maximising the value of the individual customer relation. It is a mindset shift from a transactional value perspective to a customer lifetime view of the business.

In this, customer data and insights are used to optimise the assortment and create new products, develop value-added new services and deliver a better customer experience with relevant advertising to attract and retain loyal customers. This in itself can create incremental growth considering the lifetime value of the customer and its household.

The retailer's differentiator is the data foundation provided by constantly enhanced customer profiles from the retailers' loyalty programmes. The knowledge about segmented target audiences is the new foundation for customer experience innovation that is transforming brick-and-mortar retail in many areas of the business.

Figure 1: The relationship between brand, retailer and customers in an advertising context



We have partnered with a UK retailer to build and launch an industry leading, retail media proposition which helps brands maximise their media budgets by leveraging the retailer's rich loyalty data and providing closed loop measurement.



The Digital Trading Platform

With retail media, retailers can strengthen their relationship with their brands and suppliers by offering more transparent, performance-based pricing. CPGs are also able to target customers leveraging the retailer's rich loyalty data, while getting never before seen insight on the impact of their advertising on sales with closed loop measurement.

The UK retailer that Accenture Song worked with had unique first party data assets and strong UK market penetration, signifying a distinct opportunity to become a major marketing, data and analytics player. Together, we pulled their customer loyalty data into a cloud environment and created relevant data taxonomies and consumer segments based on preferences and buying behaviours, and built a single hub that offers targeting, optimisation and measurement based on millions of shoppers' purchases.

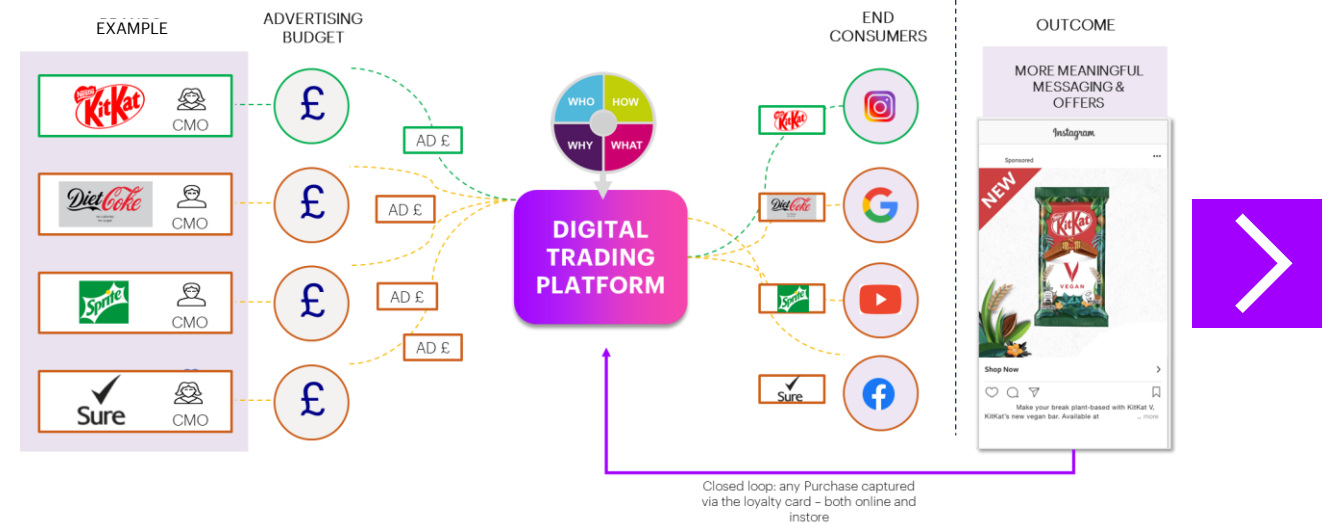
Retail media offers a win-win-win

Retailers (media publishers) create a **new high-margin revenue stream** and maximise the value of media inventory with targeted campaigns that build customer loyalty.

Brands (media advertisers) achieve a **higher return on advertising spend** through more granular customer insights and a better view into how their media is performing and how to reach and convert more contacts to customers that matter.

Customers receive more **relevant content and offers** leading to a better customer experience.

The proposition:



Bringing other functions on the Marketing data evolution

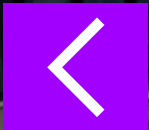
“You have to flip the narrative and show that Marketing isn’t a cost, it’s a growth lever. You have to take ExCo and Finance on the journey to understand the returns delivered and see the value of Marketing. We have to demonstrate the work we do, how we utilise data, but in an open-book way, taking them on the journey of what we’re doing.”

Claire Sadler

CMO, British Heart Foundation

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Further Information & Contacts



04

Further Information and Contacts

Further retail media insights can be found [here](#):

To speak about your specific opportunity, reach out to:

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\$14bn
global revenue (2022)

85%
Fortune Global 100
are our clients

2,500+
clients across 125+ locations

Global Awards
Cannes Platinum Grand Prix,
Emmys, Golden Pencils

Welcome to Accenture

Song

THE WORLD'S LARGEST TECH-POWERED CREATIVE GROUP

**Jaguar Land Rover's
Global marketing partner**



All marketing operations and
campaigns across 127 countries

**Created "SIM" - Mobile
loans based on smart insight**



25 min loans (5 days)
Brazil's #1 provider small loans (#4)
Millions of net new customers

**Made Tuvalu the world's
first digital nation**



Created a digital twin of the
entire island nation in 6 weeks

**Lidl's most successful
campaign ever**



We nudged 1.3 million
more customers to shop with
Lidl before Christmas 2022

KAPLAN

KARMARAMA

KINGJAMES

Kolle Rebbe

KREAM



2ND
ROAD

alleninternational

ATMOSPHERE

BIONIC

boomerang

Kunstmaan



MAUD

The Monkeys

openmind



Bow Arrow

BRAND LEARNING

CreativeDrive

designaffairs

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DIGITAL

shackleton

ENTROPIA

experity

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HJALTELIN STAI

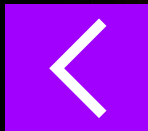
Accenture Song accelerates growth and value for our clients through sustained customer relevance. Our capabilities span ideation to execution: growth, product and experience design; technology and experience platforms; creative, media and marketing strategy; and campaign, commerce transformation, content and channel orchestration. With strong client relationships and deep industry expertise, we help our clients operate at the speed of life through the unlimited potential of imagination, technology, and intelligence. Visit us at accenture.com/song



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Thank You!



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