



Capitalizing on Changing Market Forces in a Global World

***Lights, Camera, Action:
Welcome to the World Stage!
Are We Ready?***

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Agenda

- Global Market Trends & Implications for Caribbean Enterprises
- Key Success Factors for Competing in A Global World
- Developing a Relevant & Compelling Value Proposition
- Building a Global Go-To-Market Strategy

Seven Key Global Market Trends

1. Significant changes in consumer landscape
2. Major economic activity centers shift
3. Real-time information integration changing lives & work
4. Talent becomes an even scarcer resource
5. Economic survival dependent on environmental sustainability
6. Seamless cross-border partnering becomes the “rule”
7. Intensified need for risk management – particularly in financial systems, supply chain and regulatory domains

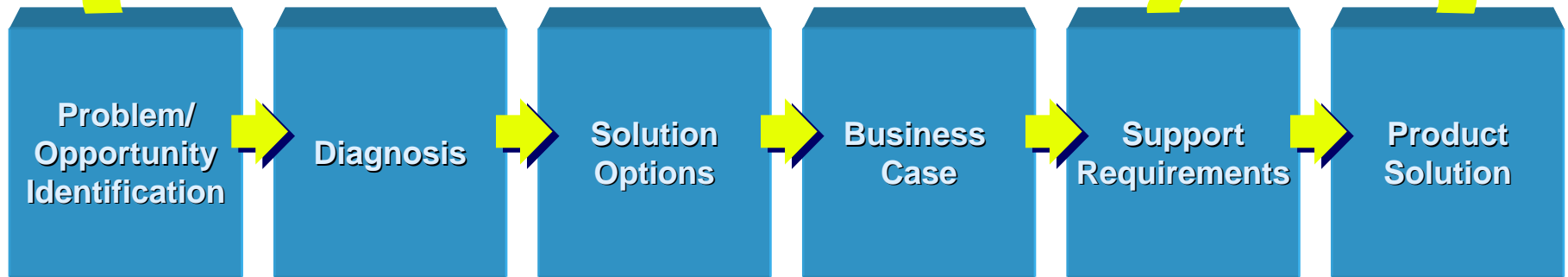
1. Significant Changes in Consumer Landscape

- Increasingly specialized good and services
- Identifying fast growth market sub segments critical
- Growth in discretionary income
- Aging population: Medical services and assisted living
- The expat Diaspora as a natural global market
- Rising customer service expectations
- Consumers have equal access to products and information
- Need to address higher level concerns to avoid commodity status

Services: A Key Weapon Against Commoditization

Proactive Value Add Solution-Based Offers

Request-Driven



Client Value Add

Designing Premium Relationships – a technology example



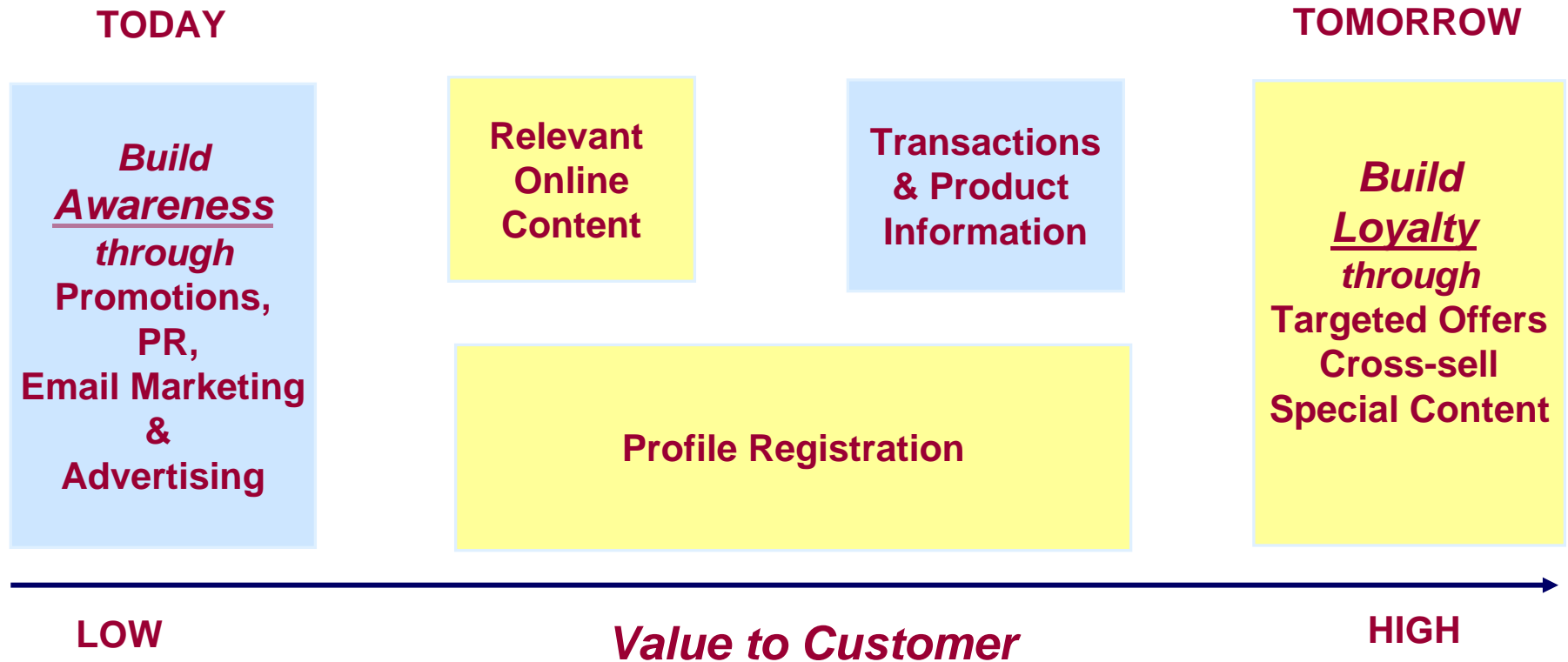
2. Major Economic Activity Centers Shift

- Major re-definition of economic hubs based on economic liberalization, technological advances, capital market flows and demographic shifts
- Asia and the Gulf become major players
- IT and Manufacturing centers continue to shift dramatically
- US continues to lead in absolute growth for foreseeable future

3. Real-time Information Integration

- Critical to production, distribution, marketing and risk management
 - Adaptive vs. repeatable processes
- Increased bandwidth, lower prices and platform standards
- Levels the playing field for small & medium businesses
- High speed networks make information more accessible
- Significant impact on company culture
 - From hierarchical to collaborative
 - Access to exclusive information no longer defines power
- Regional collaboration key

Online Customer Relationship Platforms a Must...



4. Talent Becomes an Even Scarcer Resource

- Talent proximity, language proficiency & educational preparedness are key
- Outsourcing as both business model & market opportunity
- Technology makes new pools of talent available
- More diverse customers and workforce

Geographical boundaries no longer define our social and business organizations and interactions

5. Economic Survival = Environmental Sustainability

- The sustainability movement – no exemptions
- Highly complex society-economy-ecology interaction
- Economic development versus natural resources
- Emerging markets using resources at unprecedented rates
- Major market opportunities in conserving resources and reducing depletion of natural resources

6. Seamless Cross Border Partnering - the Rule

- Room for large and small players
 - Decreasing number of large players, diminishing middle tier, flourishing small business community
- Processes and standards that integrate into global networks
 - Infrastructure & culture ready – more than a technology question
- “Lateral partnerships” within industry or category to get quick market coverage, product breadth and share of wallet
 - Tire manufacturer partners with local market wheel/tire valve/hub cap manufacturer
- Virtual consortiums of related products who cross- sell and market for one another
 - Shared client referrals

7. Intensified Need for Risk Management

- Accelerated “best” to standard practices cycle time
 - Limited window of opportunity for competitive advantage
- Aggressive entry into new, unknown geographic markets for incremental revenue
- Continually changing regulatory environment
- New tools required to monitor risk
 - Financial Supply Chain Management *equally* important as Product Supply Chain Management

Key Success Factors for Competing Globally

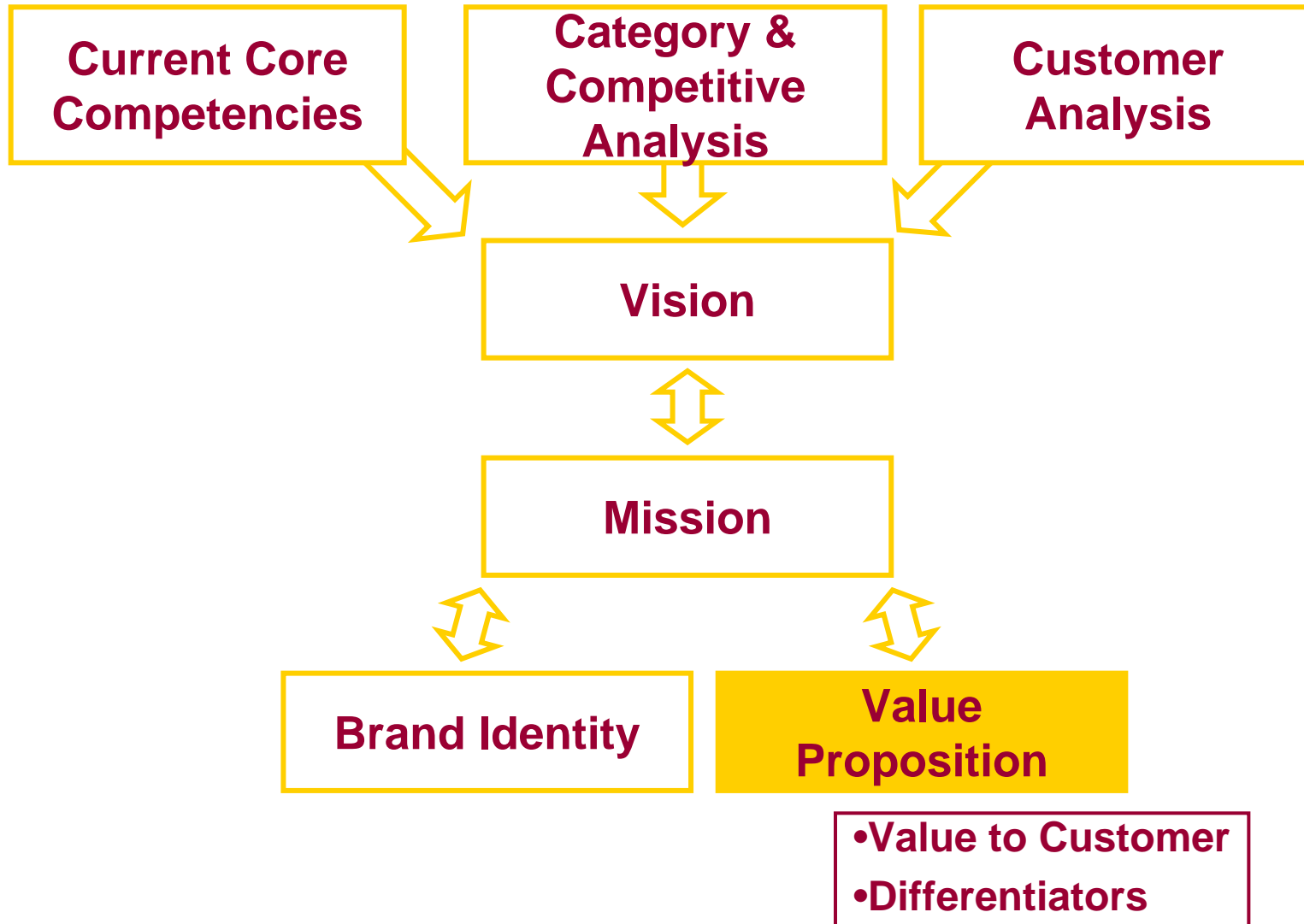
- A relevant & compelling value proposition
- An agile organizational culture – from top to bottom
- Market intelligence and customer knowledge
- Ability to develop proactive market growth strategies
- Management bandwidth to defend local leadership while expanding globally
- Quantifiable metrics that track customer satisfiers and market growth
- A welcoming business & trade environment

A Relevant and Compelling Value Proposition

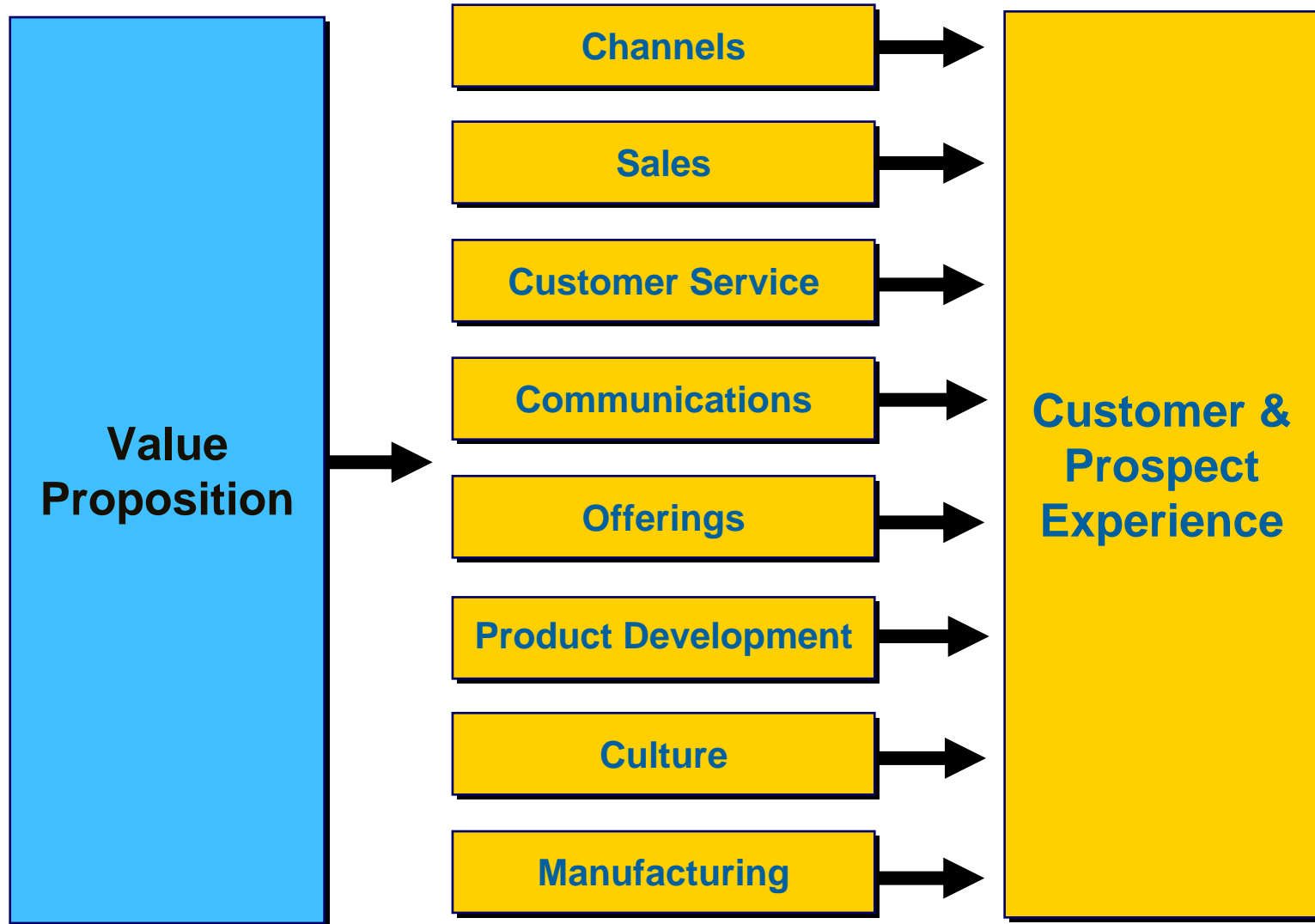
- Declares 3-4 core competencies that provide enduring customer value
- Connects your brand to customer product and relationship requirements
- Communicates “how to compete” – “*what makes us different?*”
- Provides prospects and customers with a compelling and enduring “reason to buy”
- Is customized to the unique needs of specific market segments

States the way the entire organization approaches the customer through all channels

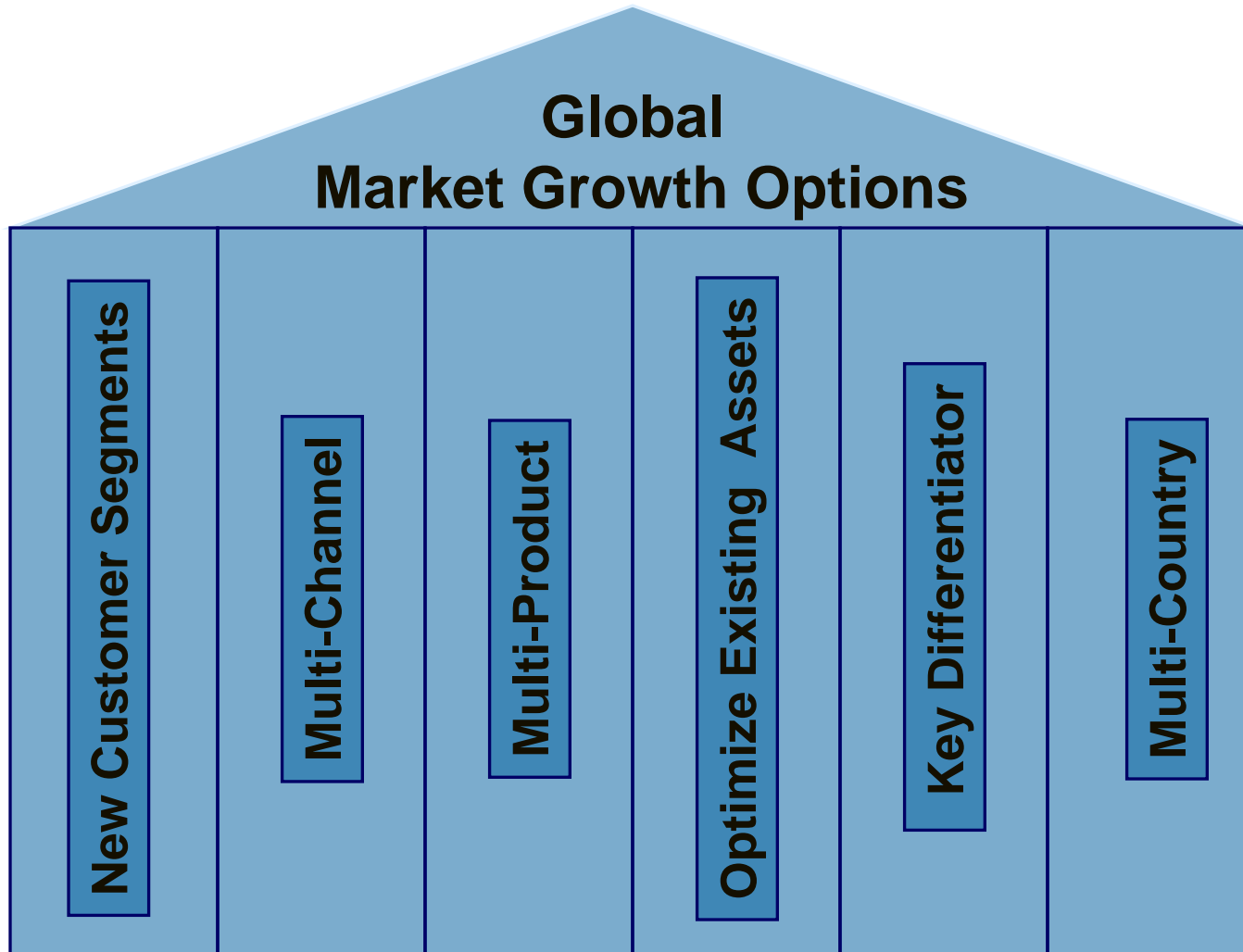
Developing the Value Proposition



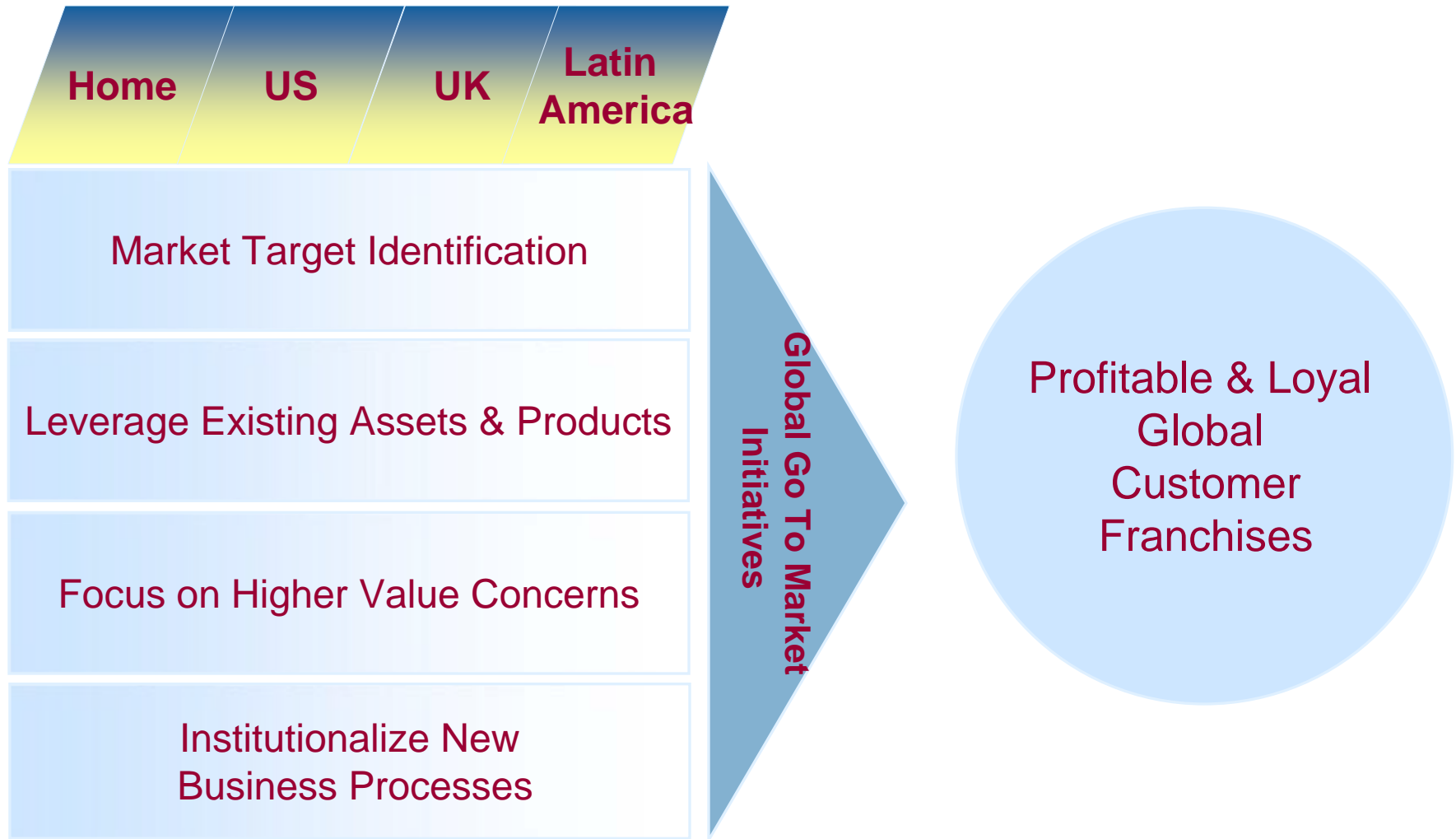
Translating the Value Proposition Into Customer Experience



Global Business Strategy Growth Pillars



Global Strategy, Local Implementation



Global Expansion Marketing Roadmap

Develop Segment Marketing Strategy

Market Sizing &
Segmentation

*Prioritized Market
Opportunity*

Culture-Unique
Insights & Information

*Segment-Specific
Needs & Wants*

Consumer Buying Behaviors
& Inflection Points

*Purchase Conversion
Drivers*

Competitive
Intelligence

*Best Practices, &
Differentiation*

Close Gaps To Improve Effectiveness

Marketing Campaign
Assessment

*High Impact Campaign
Elements*

Brand Awareness
& Consideration

*Segment-Specific
Value Proposition*

Customers' Sales/Service
Experience

*Buying Process Aligned To
Customer Decision-Making*

Milestones &
Metrics

*Revenue, Profit,
Share, Loyalty*

Execute With Results

Targeted
Lead Generation
Programs

High Quality Leads

Cross- Media,
Multi-Channel
Marketing Programs

*Enhanced Brand
Awareness & Sales*

Sales Force &
Business Partner
Training & Tools

Effective Partner Results

Balanced
Scorecard

*Cross-Functional
Business Alignment*

Must offer a “local” 360 Degree Customer Experience



Obstacles To Overcome to Change the Game

Critical to Address Key Issues Creating Friction around:

- Customers and Distribution Channels
- Competitive and External Market Forces
- Infrastructure
- Products and Services
- Alliances
- Culture

What Caribbean Companies Bring to the Table

- Entrepreneurial
- For North America: – English speaking, close proximity
- Educated vs. “educate-able” labor force?
- Global Diaspora – built-in “natural” markets
- Natural resources
- Access to sea

What Caribbean Companies Often Lack

- Fact-based market intelligence, customer data
- Agility/flexibility
- Technology affinity
- Economies of scale
- Financial resources
- Government policies that embrace competition

Continual Challenges in “Home” Markets

Increased Customer Choice

- Encourages customer loyalty & purchase frequency
- Media and channel proliferation have “raised” the loyalty bar

Accelerating Competition

- Address higher level customer concerns to avoid commodity status
- Channel personalization & customization to establish enduring customer bonds

Internet Capabilities Remain Unexploited

- Online presence critical “lever” to influence purchase decision & transaction processes

Global Competitor “Survival Strategies”

Revenue & Profit Pressures Continue

- Exploit high growth and underleveraged global markets
- Increase share of spending to fully leverage existing customer relationships
- Provide differentiated, superior buying experience to attract & convert prospects
- Understand, measure & grow total customer relationship

Distribution, Sales & Support Costs Escalate

- Leverage most cost-effective channels while *increasing* Customer Satisfaction
- Develop scalable strategy for multi-channel product delivery & service

Customer Expectations Rise

- Provide on-demand access via phone, email, chat, web collaboration, face to face, fax, messaging
- Deliver consistent, signature customer experience in all company interactions



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world is going*