The Importance of Future Proofing







2004

83,000 employees 9094 stores \$5.9B revenue

# NETFLIX

2019

158M users \$15.8B revenue



Netflix is a "very small, niche business that is losing money."

- Blockbuster CEO, 2000





**Your Hosts** 



Pam Henderson, Ph.D.
CEO and Founder

Bob Godfroid, Ph.D. Advisor

Founded 2002 Globa Product

Growth Strategy & Innovation Firm Opportunity
Thinking
Process

Digital

Ecosystem: 4,000+









make it to market!

Consumer

**Electronics** 

MOTOROLA



ongvie





Manufacturing Transportation / Aerospace / Equipment / Electrification





















































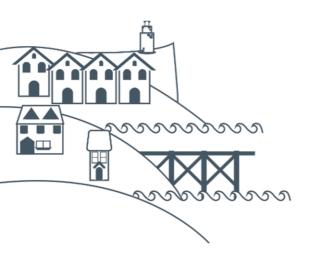
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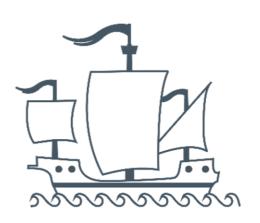
- 1. Ideas \( \neq \text{Opportunities} \)
- 2. Conditions are changing fast
- 3. Opportunities exist at intersections
- 4. The importance of alignment

# Opportunity (op·por·tu·ni·ty) Latin OB PORTU (1375-1425) Into port

## late 1300's



Need



Value Proposition

## OB PORTU



Conditions

## Today



### An idea before its time...

P&G

**Need** Eat more vegetables, outbreaks of food-borne illness

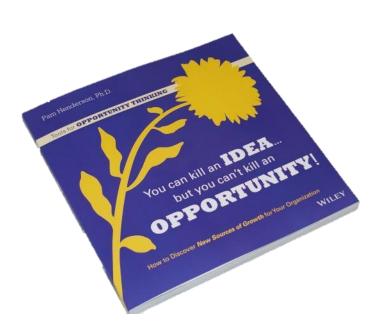
**Value** Edible surfactants, great scent, easy consumer story

**Conditions** Retailers disliked implications



## Ideas \( \neq \text{Opportunities} \)

## You can kill an IDEA...



But you can't kill an

## OPPORTUNITY!















### Idea:

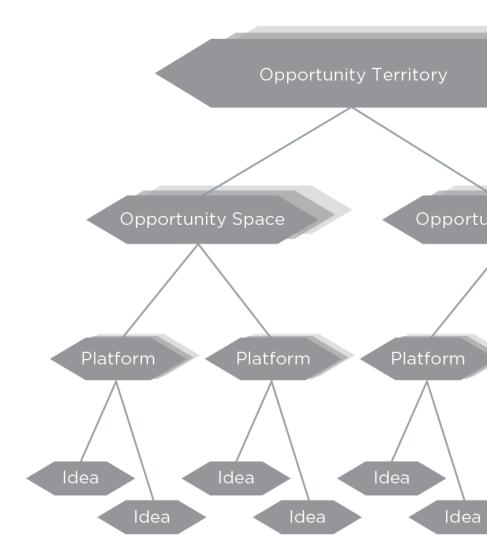
Creating products outside the core business



### Opportunity:

Engaging a younger audience in the brand and decorating with color

## Middleware



**Need** Hygiene health in Africa is very poor

**Value** Very effective hygiene products

**Conditions** Providing clean water <u>first</u> will build the market for the future



P&G has provided 11 billion liters of clean water since 2004, helping women around the world.



# Conditions are changing fast

#### **Future Proofing**

#### Future of Workforce

#### Definition

Determining the effects of disciption on women and employers of the present and subary. Exceeding the needed to develop succional and again between product on the job must be proving as a result of bedien

#### Sociocultural Competitive Economic Natural Advancements

Tasich Me Wow (Or Can Yoy/Tz: The ourrent school-model is broken and increasingly

proble to adaptately train individuals for highly technical jobs. Post is Jud Poor in the last decade, the cop behavior loss-excome a

and they black and Hispanic counterports shook by about half

Temporary Soliding The number of Annign born workers in the UE-has resented 20 Hr in 2018, The of the total workforce. These workers algorificately high the country to meet or though allows that region and regions a growing mitted population.

American Women, The US 2018 somer/s average moone was 6116 of mons, China's a

Yea're Retired/1: Young people are redically restructuring their lives with the good to leave the workflying deciates earlier out, retirement by 400

to-Office Precipitity Boll or then moving to entitude name to without as unpresent predicted, official are offering on a to flexibility for their employees with variable boors that previde schedule leaved bootons without having to work from home

We're All Paints Here: To mot alto retiennals, emonyers seek to offer a while the vision and community to encourable employee compadery instead of a topical hiererchical and impersonal atmosphere Who Will the up the Production Line's in 2018, the monufacturing vector was an acute

tice in his openings, reaching a monthly everage of 23,000.

Location, Location, Location: Urban gridlock has limited transit and commute to close to city broth, reducing the radius prostoyers can drow tarent from

New and Emerging: Nevent and promising jobs for the end of the decade dayslop in blockchein and data specialists, with growth enterpoted in mid entirio, moduling and project management

Jobbse: 19 of American jobs ore at risk of automation. Shares jobs are at the groutest risk for disnaption, with orbid, postal services and largel following close technics:

Where is My Construction Buildy: Skilled-labor shortspec in the trades has pingued construction connectors, limiting new projects and growth

More Truckers Please: 70% of goods in the Ut are moved by trucks. The

shortage of \$0,000 drivers. Afting businesses and consumers in their wallets.

Pin Drowning: Employees are now entering the workforce with large student loan didn't, employing engineers to aid mount graduates in their competition for later But is it Green't Millerinias, are arown to companies with strong-authoralisity records. artification between the representations are the rest interested inharmory

protection, causing companies to change factics by either not selling is unprotected Fear of Unfalc T countries or by offering less robust products. Let Me Try: Hat

Future Proofing

#### Future of Innovation

#### Definition

Future

Attitude is Even

It All Starts Hee

There are \$100.7

Labor Crisis for

Company Crown

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Investigating the methods, meterals, and approaches to developing new products, se product development, and customer vetting. Developing landscapes for consumer to of regulations, technology, and available resources.

#### Sociocultural Competitive Economic Natural A

Street to Store in 4: The fastion industry has been disrupted by fast feetion where companies bring trends from the catwolk to stores in as little as four weeks

Your Opinion Matters: Today, companies apomor expensive custom studies of consumer research such as surveys, panels, BASES and focus groups that are not predictive of enovation success.

Talk to Us: Companies are more quickly testing and refining products via e-commer where products can be said for repid feedback. Perfect Day ice cream was lounched to a limited audience to gauge interest

Brand Dominance vs. Small Companies; In 1937, tursure was an average 75 years on S&P's SDD Index. In 2011, it was 15 years. In 2025, this is expected to be five years. Assets are out, whee againty and information are in

Smaller, Faster: Small to mid-sized companies (<\$10 in sales) are innovating faster. than their larger stock-driven competitors, with many aspiring to be surchased and

Have My Cake and Eat It You. Companies are expecting more of their suppliers requiring them to monitor inventory / forecast and garwrate new innovations. In: contrast, preferred vendor lists can exclude new vendors

Investment Dispartities: Consumer Packaged Goods companies apend 1% to 5% on R+D, while America spends more than 10% on its R+D annually - paying the way for innovations like the Echo, AWIs, and same-day delivery drones

Trust Your Finger: While 60% of food being thrown away in the UK is still fresh thus has cautious expiration data), London-based Mirrica developed smart labels on food packaging that become bumpy hours before food expires Sustaining Innovation: Venture capital revestors, focusing on innovative growth, are

ng the UN Sustainability Davidopment Goals as opportunities for their efforts to better align with future sustainable regulations and business models

Fountain of Data: Coke finestyle machines are giving real-time data on preferences with daily oploads, feeding the supply chain and enabling Coca-Cola to develop new products they never would have tested lasted on consumer experimentation and

Bullseyer Companies are harvesting data from an line stores to make precisely terasted decisions on where innevetion should occur - such as C&A Marketing, that examines Amazon user comments to create new products Petchwork Data: Data is "found" in all kinds of places - past projects, social media,

scadernics, sales, chatbots and simulations. Since found data is a first step toward big data use, integrators can develop their own data wells-

If is Getting Hairy: Laws in Germany give (P to the individual, not the company) leading organizations to hire from other countries

More with Less: Instead of just selling energy and equipment, Kerya-based M-KORW adopted the frugal innovation methodology, taunstring one of the most advanced. Pay-As-You-Go platforms and enabling a new revenue stream Over Enterant Internalized Introduction is negatively impacted by a lark of pintal ID.

K-Ray Vision: Computing technologies, such as PatentScout, are used by businesses.

#### Future of Commerce

#### Definition

Expressing fast colors and actions are accorded with how to consense and consense and recorded products. Capturing present and black disciplines and the on production, proceedings, transportation and payment approaches to create agile and impactful business strategies and practices

Today ET Please Revent Motific connections producted for sport WMs of total a communior status by 2020, thing on-device revenue to \$700.

Ws Haspening 1031 e-connection is contently the faction growing bettern of the 609. Industry, with an armual 6% increase compared to industry, with 2%

Over Bafare & Begins: 70% of compiner isonehis, and decision-making processes are compared before contacting a contental complete. We've Spills: 636 businesses are skinded an affective product presentation. Some

You can completeration, stream mental tributation, white others use emotional and somethible content, such as well-rare, durings and videos:

Therete Upf Transis Down! Returns book for wook to manage / elitie entire custoffer feedback and reviews (I negative review = 20 lost disnortant). Online Grants: 20% of 1028 proceductors and distributors dince 60% of order

**88 There Barly:** risign plot forms (e.g., Anospen) expend into companies (if) we digital usualization of orner thorner. Accessing this field gives from the power to "report out," or exhibitions or commented bloods and accesses or full manners of competitions.

Consistent Culput: With savellottle content driving online custs nahafadkarer with documented, consistent debyery processes have an of the same over forms busing formal region most paths.

Where Digital Prests Tangible: Profestion support brick and monter sales and vice verse 300% of an about partitioned streams ones beautiful, when BBN of exerci purchases thicked physical viola.

In That a Louish College coupping or among restricts haven by the her ng accommittely, but also enabling increases sales of knock-offs

Whole Swalley: The purchase of Whole Foods allows Amoton to create a fully integrated, fate of interrigan pullboar appearance, doing them all tacks excess the physical and digital words by offering popular, fresh and impulse terms.

Report Review Pilliaments continues obsciously and logisty programs. BRIL will large critics and bickeds in-stone if the notator offers of 20% discount, but 3.75 profer to partitions entire offsetlight from the instruction

Sustainability for Distribution; New forms of packaging are required for product.

probeotion. Concenters been't diswept in event concern for excess packing in houseone with a look of mitophysisters for exercting, that will shall. Double Helix; \$30.00 and Arcube's involvement is gonetical objets consumer product

Setting Chatty: Ai-cowered chattiots are becoming smarter, 80% of business in to have challed subsylet so argumental by 2020 a soon sales, marketing specify chain and maintenency sectors. Keep It Consistent: Utransfer to experience has become transactive IESS cartieror

use the different interaction channels throughout the decision-making process, and almost size, some every frustrated by inconsistent channel information. That Time of the Month: To compute online: Incords added subjectorior-based

#### Sociocultural Competitive Economic Natural Advancements Regulatory International Organiz

Brook Name World: Intrody physical, digital and biological data has esting, to

with apphabitated algorithms, drives hyper-personalisation rewisiting allow retailers to predict a paragra, wants lang before they knew they want it.

Gee is the Lehelbert Number: With most shopping taking place of home you  $\Delta R / VR$ , outlies and other technology to stow excelled consumers also lear experiences board another hold outliers of software.

Risky Retailings. Amongo and Wormert have our big brands at risk by director to taked amountable for effectivable this report for Third correspond products

Business as Usual: voice-based and automated commerce assistants have

Meanwhiled informing to yet expensions or making makine RSN parchases, replacement parts for existing occuprient or updating parent accepts. You Love! Supply chair proves who have methologies are market shore as

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Deep Exploration. Open contained featuring represents 40% of virtue problem. All ESS analytics techniques, using contained most betterney, solen region and solen broad as contained as an appearance of conducting sales as

Big See Rederigned: To see the log box stores as a retail choose, tro brond I engaging the close enganetric, of Every AH / 's 11 fe, vivin products and the legs for the home.

Artificial bywaterest: At admoton name global SCP by \$157 by \$550, accounstreet 1% of CDP growth per year.

No More Shooping Carts: The online groosy market much is SDSB and capt

ne-littly of local US grocery retail color by 2025.

Floating Hornest Grottel repriving his reached the IPC point, which impacts - prographic levels without to global books, including exactly charts, expression reach 100H books.

Power Outaget Children to be widow to the

commerce even, which is an everyor their with the potential to further rate obsorbt power grids. Virtual Continuous Books: The use of AV conferences and pitches has been

Futurities III. with 826 componies using AR to communicate their composi-proprieds, designs and should allow be fire logos.

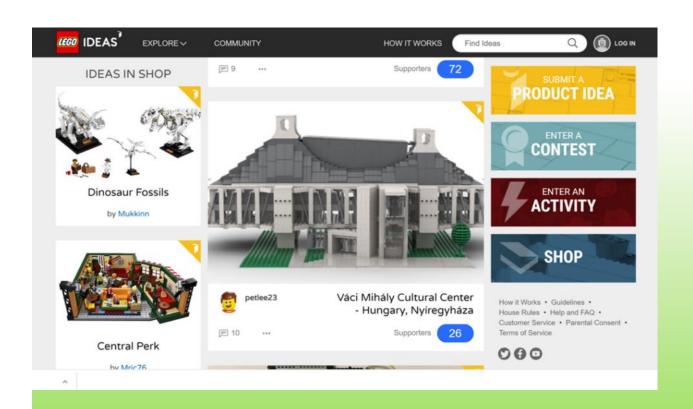
Larger Than Life: AR / VR places larger products in a portable with all space. such there to explain and to interest with any fevhales without sampling stre photograph product. Take it to Me. Ito avoing of transportation takes are used for absparing of goo

major habs by reducing congestion on roots / in other Strifting Product Selection: E-codemerce moses from for to feet produce to

dispurced retail that can have place in the virtual or physical world.

## Innovation



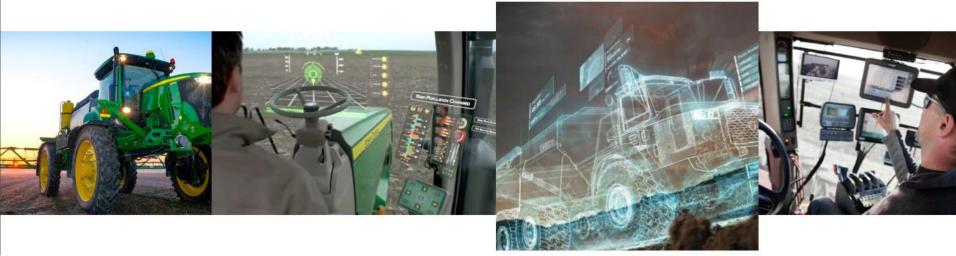


## Commerce

## Workforce



# Opportunities exist at intersections











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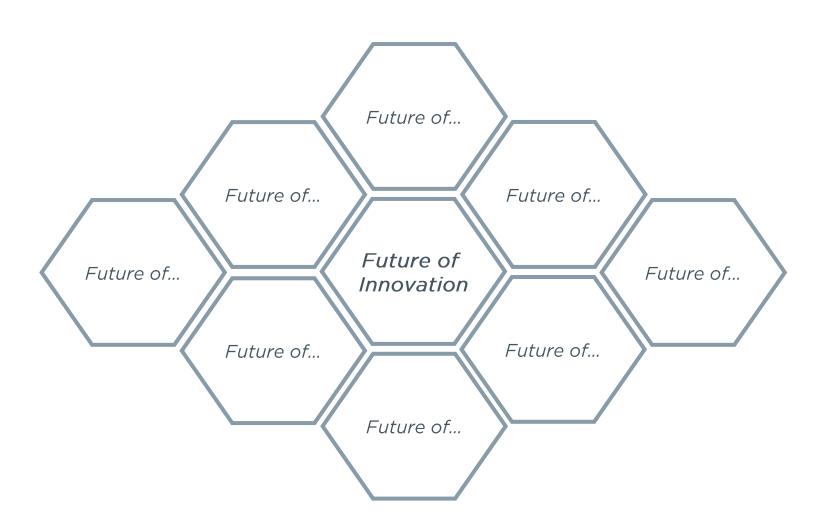
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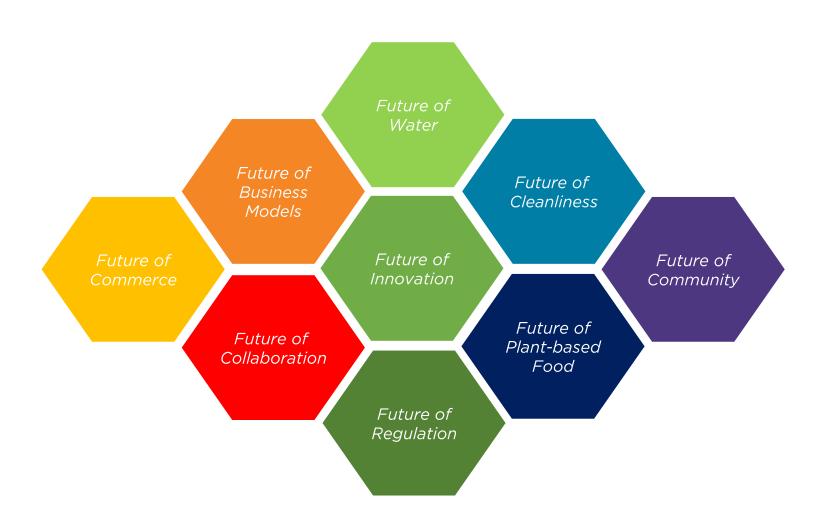
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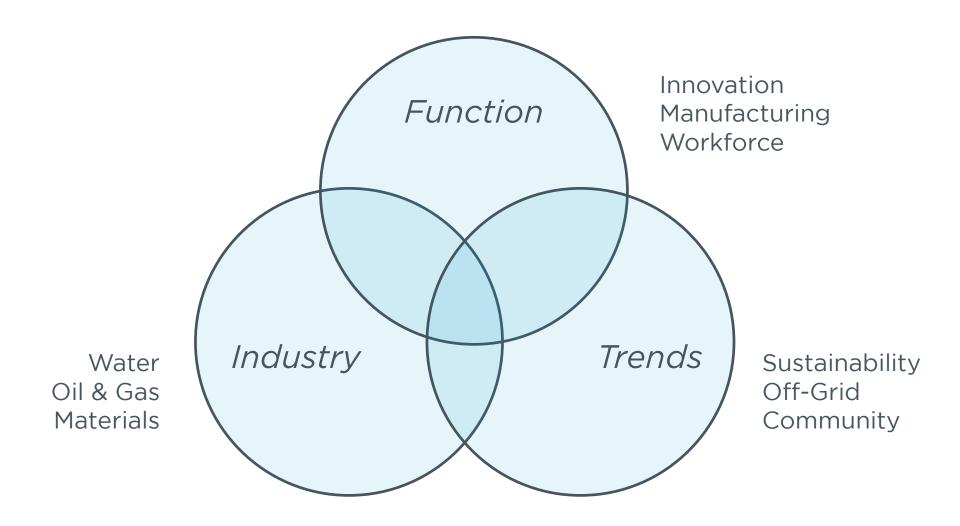
Sociocultural Competitive Economic Natural Advancements Regulatory International Organization

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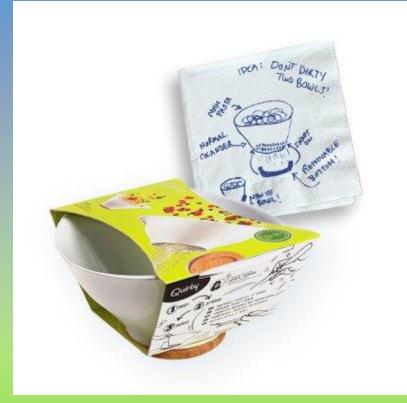
## Commerce



Workforce

## Commerce

## Innovation





Workforce

# The importance of alignment

## The Future of...

Commerce Mobility

Water Business Regulations Models

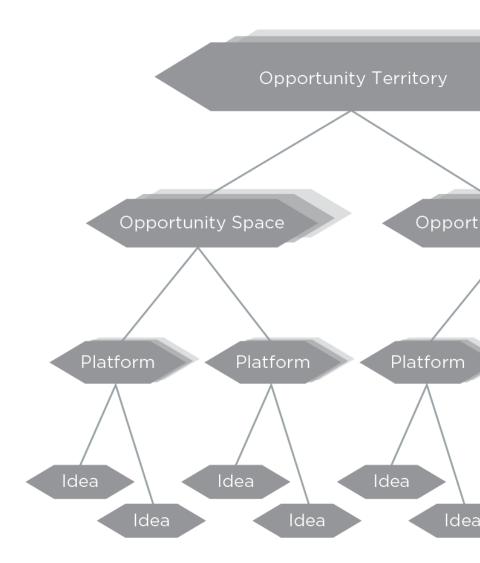
Innovation

Workforce

Cleanliness

Manufacturing

Sustainability Energy







NewEdge



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