



MartinRoll

Building global enterprises & brands

Skolkovo

Moscow - 26 February 2018

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**”To succeed in the global bazaar
requires a global mindset”.**

Narayana Murthy

Infosys founder and mentor

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Next Generation Leadership MartinRoll

Leadership in the 21st century will be influenced by constant change

21th century challenges	Implications for Next Gen Leaders
<ul style="list-style-type: none"> Geopolitical volatility Technological disruptions Economic and political uncertainty Shifting demographics 	<ul style="list-style-type: none"> Balance short- and long-term lens Resilience Keep horizontal and vertical outlook Global perspectives and local insights Strong strategic compass

Purpose	<ul style="list-style-type: none"> Unwavering focus Clear personal vision Clarity of thought 	Long-term lens	<ul style="list-style-type: none"> Has a futuristic vision Thinks and plans ahead Executes strategically
Resilience	<ul style="list-style-type: none"> Manages change Stays ahead of curve Strong character 	Adaptation & Agility	<ul style="list-style-type: none"> Manages disruptions effectively Continuously innovates
Networks	<ul style="list-style-type: none"> Build network of leaders Cascades relevant messages and change 	Culture orientation	<ul style="list-style-type: none"> Driven by values/ beliefs Business culture and ethics ambassador

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Branding starts in the boardroom MartinRoll

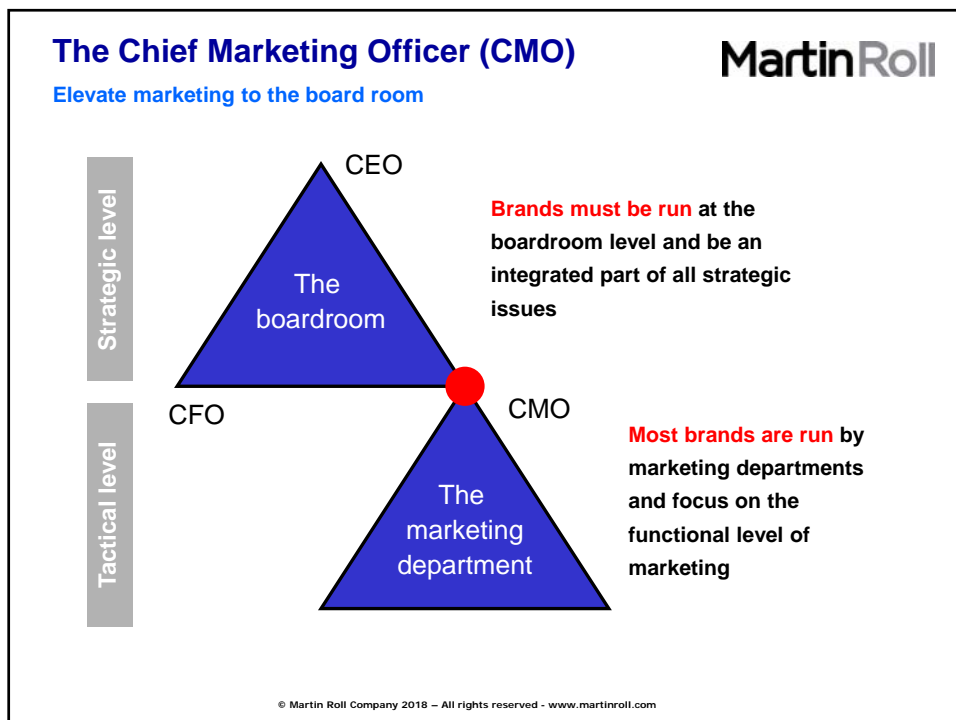
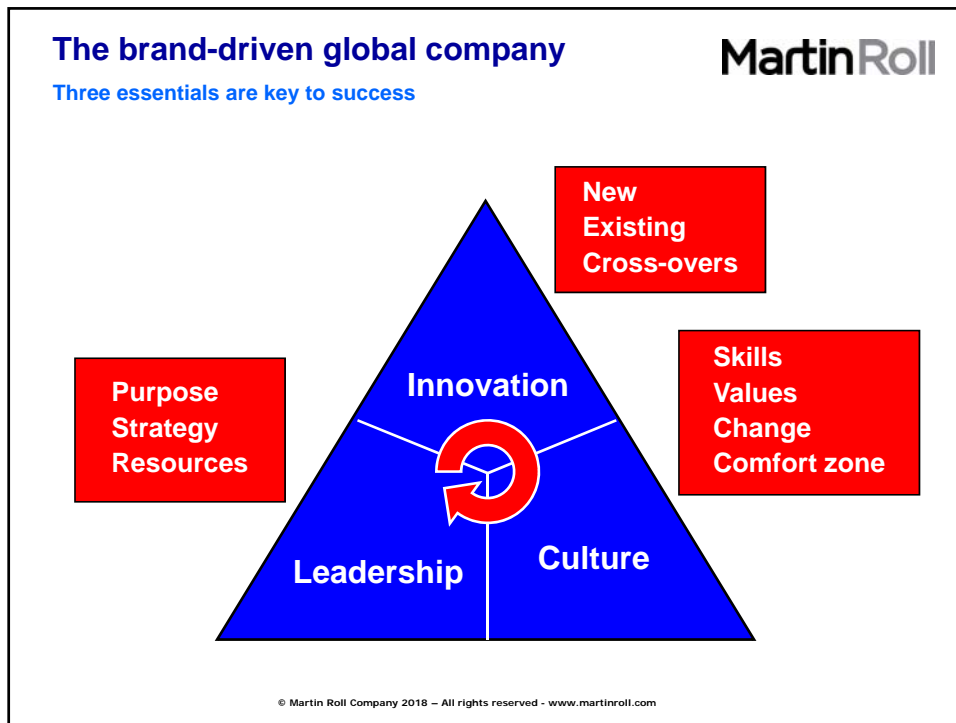
Three strategic drivers of successful brands

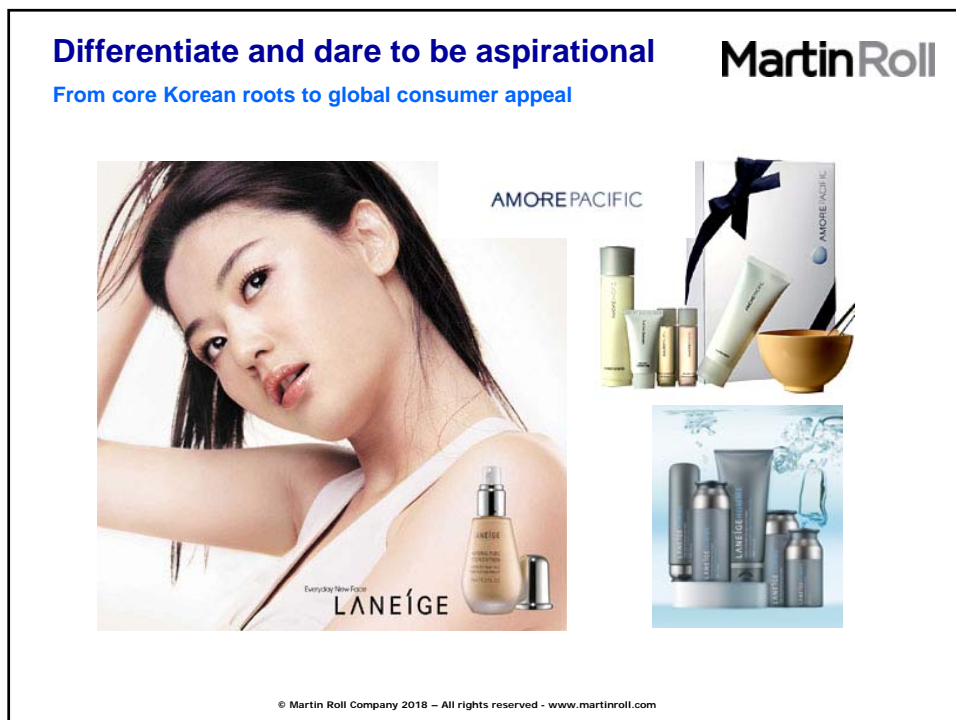
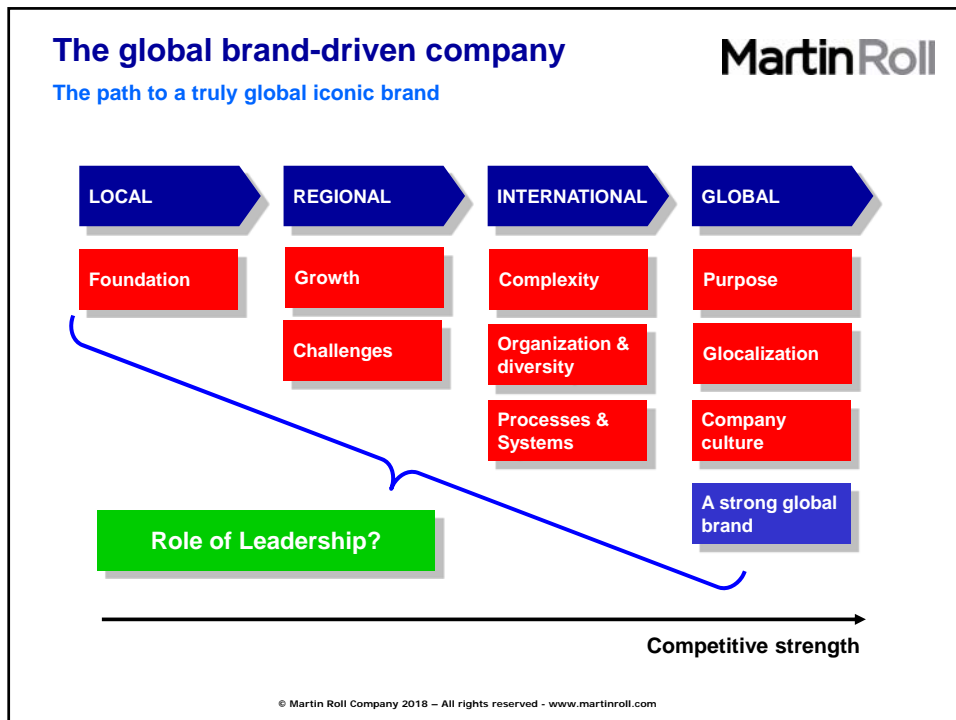
Mindsets & beliefs

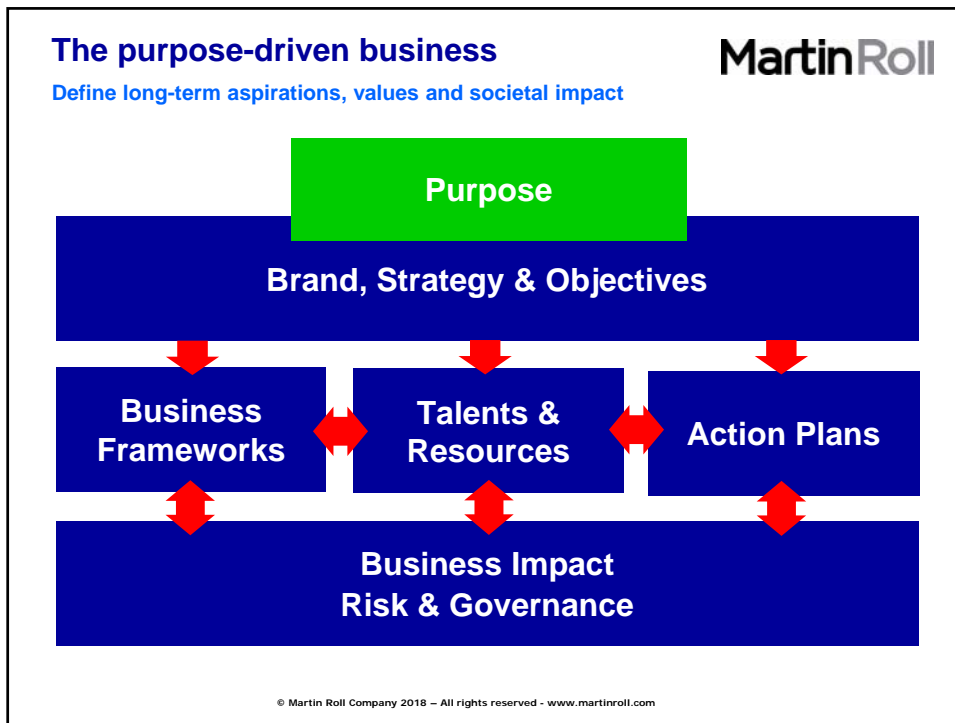
Skills

Resources

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Turn-around of LEGO

Back to core, deep consumer insights, then innovate

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Role of leadership?	Values & legacy?	Business opportunity?
Authority?	Trust?	Succession?

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Benefits of branding nations		MartinRoll
Nation brands: Important assets for enhanced global competitiveness		
Nation branding activity	Benefits	
1. Export branding	<ul style="list-style-type: none"> • Positive halo effect on products • Country-Of-Origin effects • Increased ability to export 	
2. Generic nation branding	<ul style="list-style-type: none"> • Ability to attract tourists and skilled workers • Increased ability to attract investments • Ability to reduce incentives for investors • Increased cost pressure on competition • Resilience to financial crisis • Ability to sustain higher prices 	
3. Internal nation branding	<ul style="list-style-type: none"> • Ability to retain skilled workers • Increased productivity from better morale 	

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”Frankly, IKEA is doing more for the image of Sweden than any governmental efforts combined..”

*Director of the Swedish Institute in
“Public Diplomacy Magazine”*

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The admired Thai destination brand

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Bold government decision to build tourism eco-system

amazing
THAILAND

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The solid Swiss brand

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Relentless focus on quality and governance enforced by heritage



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Redefining Made-in-Asia

From local to global reputation building on a strong core

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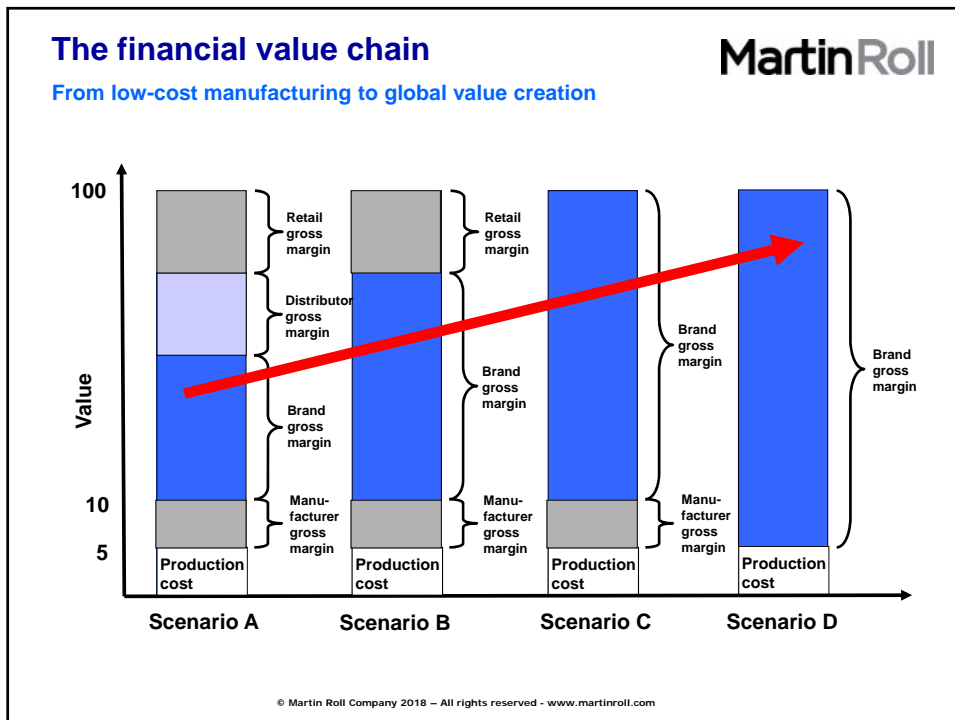
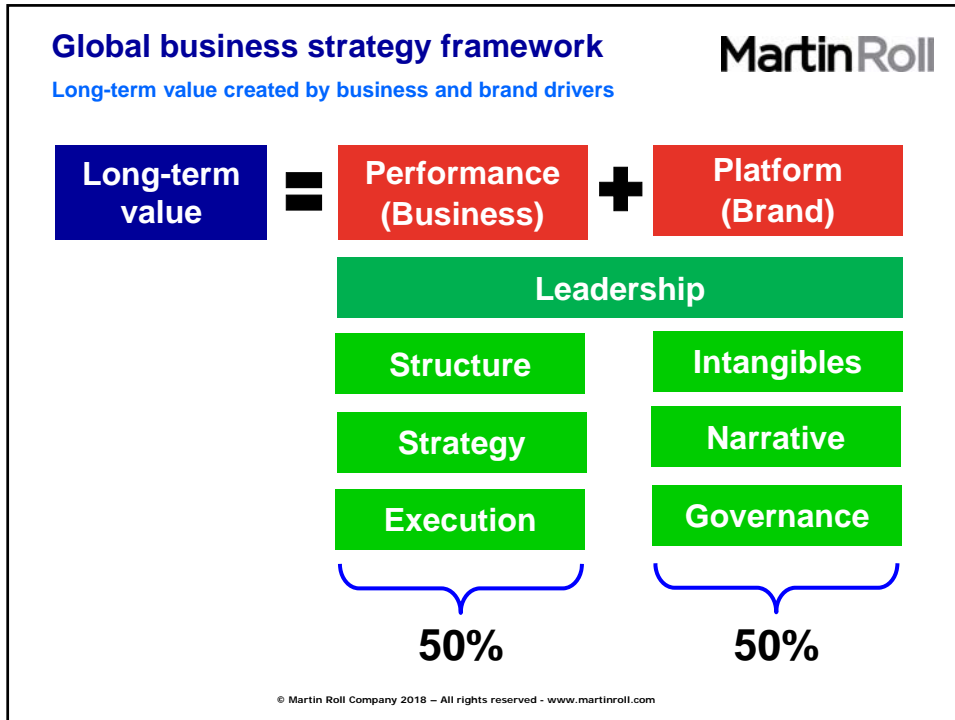
HUAWEI

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**The success of Next Generation
Leaders will be defined by their
ability and willingness to drive a
powerful transformation agenda:
Daring, Bold & Different**

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”Have the courage to follow the heart and intuition. They somehow already know what you truly want to become”.

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Build your own (unique) business model **MartinRoll**
Winning, high-performing companies balance Art & Science

Art  **Science**

Role of leadership?	Values & legacy?	Business opportunity?
Authority?	Trust?	Succession?

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”The fact that scientific analysis of data has made the world a better place does not mean that it should drive every business decision...”

Roger Martin

Harvard Business Review (Sept 2017)

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10 characteristics of a strong brand

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Brands are strategic assets for successful companies

1. A brand drives shareholder value
2. The brand is led by the boardroom and managed by brand marketers
3. The brand is a fully integrated part of the entire organization, aligned around multiple touch points
4. The brand can be valued in financial terms and should be treated as an asset in the balance sheet
5. The brand can be used as collateral for financial loans and can be bought and sold as assets
6. Customers are willing to pay a substantial and consistent price premium for the brand
7. Customers associate themselves strongly with the brand, its attributes, values and personality
8. Customers fully buy into the concept which is often characterized by emotional and intangible relationships
9. Customers are loyal to the brand and would actively seek it and buy it despite other cheaper options
10. A brand is a trademark and marquee (logo, shape etc) which is fiercely and proactively protected by the company

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The Asian brand challenge
Lack of imagination and calculated risk taking

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Anything is possible **Just do it**



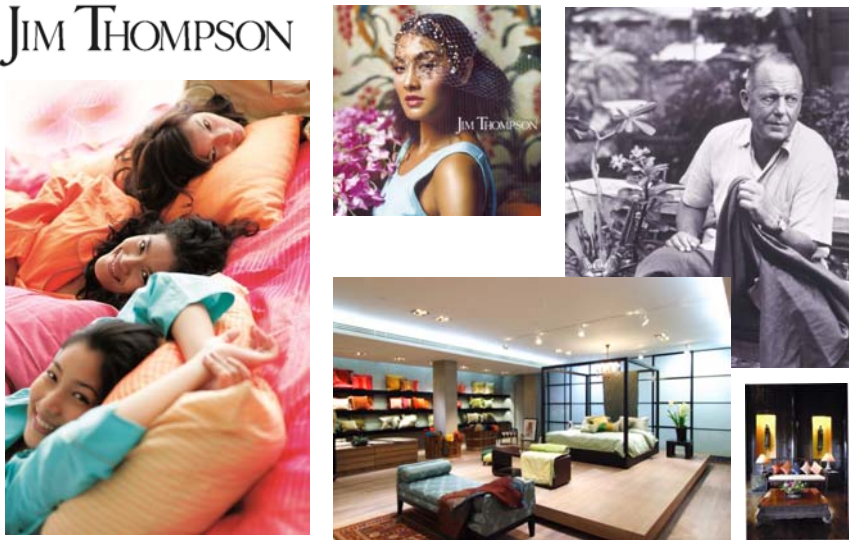
Authenticity and Differentiation

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Authenticity will regain prominence
Jim Thompson: Brand built on strong myth with a modern twist

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JIM THOMPSON



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Hermès

Legacy, craftsmanship & strong heritage as brand guardrails

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"We don't have a policy of image, we have a policy of product"

Hermès CEO



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Hallyu: The Korean Wave

The rise of Korea's billion USD cultural economy & pop culture

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The iconic Korean brand
Korean conglomerates led the global rebranding

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The image displays four prominent Korean conglomerate logos. On the left is the Samsung logo, featuring the word 'SAMSUNG' in white capital letters inside a blue oval. To its right is the Hyundai logo, which consists of a silver, stylized 'H' inside an oval, with the word 'HYUNDAI' in blue capital letters below it. Below the Samsung logo is the Amore Pacific Corporation logo, with the text 'AMORE PACIFIC CORPORATION' in blue. To its right is the LG logo, featuring a red circle with a white stylized 'L' and 'G' inside, followed by the letters 'LG' in grey.

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”Without action, the world would still be an idea...”

*Georges Doriot, Founder
INSEAD Business School*

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Asia: 5 strategic themes

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Asia continues to play an increasing, influential global role

1. **Asia will be the future global leader. It will take time as also Asian countries have challenges**
 - Demographic shifts (4 billion people, rising middle class)
 - Expanding younger population across Asia
 - Rising middle class in Asia: 66% of global in 2030
 - Increased political and consumer self-confidence
 - Asia will continue to outperform the rest of the world towards 2050
 - China will assume a more influential and assertive role
2. **Gradually shifting away from Western/American style capitalism which reigned for the last 200 years**
 - From an era of plenty to an era of scarcity
 - Knowledge, education and optimization will become key factors
3. **Economic globalization will be redefined by Asia with huge political and economic perspectives**
 - Rise of Asian multinationals & brands
 - Higher innovation budgets + strong beliefs in innovation
 - Conducive government incentives & policies
 - Continued state influence & interference

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Innovation in Asia at scale

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JD.com: Changing the face of e-commerce in China



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Asia: 5 strategic themes

MartinRoll

Asia continues to play an increasing, influential global role

4. **The West will gradually move into the role as adjusting partner instead of trendsetter**
 - Trends will continue to emerge from Asia
 - Asia will build more global iconic brands
 - Export of “The Asian Identity” and “The Way of Life”
5. **Shift in 50 global city ranking (GDP based):**
 - 2007: 8 in Asia
 - 2025: 20 in Asia
 - All newcomers origin from Asia
 - Urbanization will be a powerful Asian growth driver

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New face of Asia: Urbanization

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Mobile car wash in Beijing



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3 global growth strategies
Internationalizing and globalizing the enterprise

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Organic growth

Alliance

Acquisition

Management expertise?

Time-to-market?

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HSBC 

The world's local bank

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lenovo

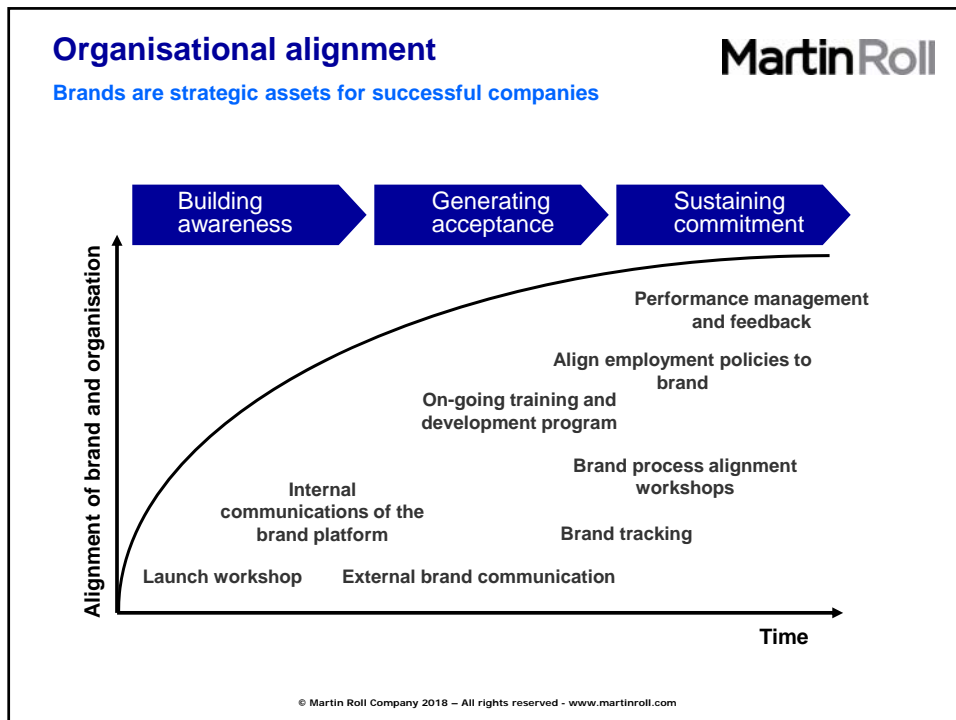
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**HERO
HONDA**



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Arrogance and complacency are the most lethal enemies of strong brands....

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Leveraging brands as strategic assets

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The Singapore Girl is managed by board and government owner



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Intensive training builds the culture

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Singapore Airlines runs 15-20 days training a year

SIA Academy

- Service excellence is everything across the organization
- Well-trained employees at all levels
- Rigorous training and retraining
- Awards and recognitions



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Culture is the currency of strong brands
Identifying and nurturing customer centricity

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**SQ from PEK
to SIN**

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**”Fully engaged customers deliver
23% premium over the average
customer in terms of share of wallet,
profitability, revenue and relationship
growth”**

Harvard Business Review

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Singapore Airlines' success factors

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Consistency and excellence are key drivers

1. **Well-balanced brand promise and brand delivery through strong executive leadership**
 1. Facilitates future earnings, customer loyalty and strong pricing advantage
 2. Strong brand management guards the brand assets
2. **Operational efficiency**
 1. Heavy investment schemes
 2. Efficient fuel cost hedging
3. **Service Excellence**
 1. Well-trained employees at all levels
 2. Rigorous training and retraining
 3. Awards and recognitions
4. **Culture of constant product innovation**
 1. Setting industry standards (first to offer)
5. **Modern fleet**
 1. Reliable maintenance and support
 2. Top safety record
 3. Average fleet age: 6 years (one of the youngest in the industry)
6. **Global network**
7. **Benchmarking best practices**
8. **Keep reinforcing commitment to excellence and superior quality**

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**”Culture eats strategy for
breakfast....”.**

Peter Drucker

Professor of Management

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ZARA: Culture of encouragement

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Inditex is a distinctively different company



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New paradigm for brands

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Marketing and brands are becoming strategic drivers

From	To
Manufacturing	Branding
Production	Design and innovation
Low cost/ Low perceived value	Low cost/ High perceived value
Price as sales driver	Value as sales driver
Short-term financial focus	Long-term financial focus
Branding in marketing function	Branding in boardrooms
A function drives the brand	Organisation drives the brand
Market share	Brand equity
Marketing as cost	Branding as strategic investment
(Profit & Loss statement)	(Balance sheet)

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How to build iconic global brands

10 key drivers of excellence provide a global road map

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1	Global brands are driven by a strong purpose	1	→ 10
2	Global brands provide strong financial results	1	→ 10
3	CEO leads the brand but everyone remains involved	1	→ 10
4	Strong brands drive constant innovation	1	→ 10
5	Global brands are customer centric	1	→ 10
6	Excellence in insights and intelligence	1	→ 10
7	Technology is a key business enabler	1	→ 10
8	Business performance and brand equity are measured	1	→ 10
9	Strong culture brings iconic global brands to life	1	→ 10
10	Global brands drive constant change	1	→ 10

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”Board directors should spend a greater share of their time shaping an agenda for the future”









“Building a forward-looking board”
McKinsey Quarterly

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Rethinking the crucial role of strategy

Success is not a given in a fast-paced, digital & disruptive world

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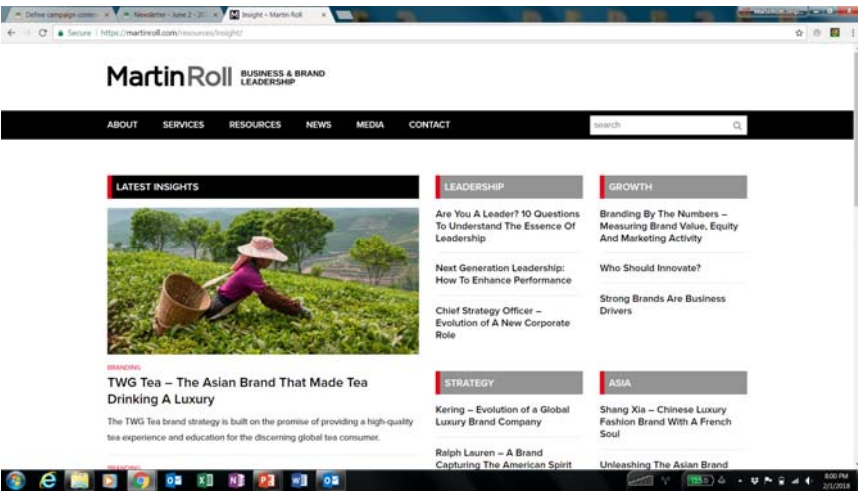
 <p>Defined entire new consumer tech categories and drives the market</p>	 <p>1990s: Failed to innovate, reinvigorate the brand and capture consumer spirits</p>
 <p>Service excellence and first mover in technology as core drivers of impact</p>	 <p>Failed to capture the smart phone technology despite the market lead</p>
 <p>Redefined fast fashion and delivers faster, better and broader than anyone</p>	 <p>Failed to leap-frog in technology even though evolution appeared slowly</p>
 <p>Rediscovered the core and innovated based on deep consumer insights</p>	 <p>1990s: Complacency and bureaucracy blocked for disruption at the core</p>

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Insights center

www.martinroll.com/resources/insight/

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The screenshot shows the 'Insights center' website with a navigation menu (ABOUT, SERVICES, RESOURCES, NEWS, MEDIA, CONTACT) and a search bar. The main content area features a 'LATEST INSIGHTS' section with a featured article on TWG Tea. Other articles are categorized under 'LEADERSHIP', 'GROWTH', 'STRATEGY', and 'ASIA'.

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Family Business Strategy (2018/19)

Leading Future Paths & Driving Long-term Impact

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Martin Roll

Business & Brand Strategist

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- Martin Roll delivers the combined value of an experienced global business strategist, senior advisor and facilitator to Fortune 500 companies, Asian firms and family-owned businesses on how to build and manage strong, global brands as well as leadership of high-performing, marketing-oriented businesses
- Martin Roll is very experienced in engaging and advising clients at all management levels from business owners and C-suite leaders to functional staff across multiple industries and cultures.
- Martin Roll has been a Senior Advisor to McKinsey & Company since 2015
- Martin Roll is a keynote speaker at global conferences, an experienced conference moderator and executive workshop facilitator. He also teaches MBA, EMBA and Executive Education programs at Nanyang Business School (Singapore), and is a frequent guest lecturer at INSEAD and other leading global business schools
- He is a Visiting Entrepreneur in Residence at INSEAD

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Martin Roll

Business & Brand Strategist

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- Martin Roll is a member of the global Advisory Council of Welspun Group (Mumbai), a non-executive board of director at ORLO Watches (Denmark) and a Senior Advisor to Cocoon Capital (Singapore)
- Martin Roll is the author of global bestseller “Asian Brand Strategy” (Updated edition 2015) and co-author of “The Future of Branding”
- New books in pipeline: How Successful Leaders Raise the Bar (2018), and Family Businesses Strategy (2019)
- He is a business columnist with INSEAD Knowledge, a prolific management writer, and a regular commentator in global media
- Martin Roll has lived in Asia for two decades and serve clients on all continents
- MBA from INSEAD
- **Specialties:** Branding, Marketing, Strategy, Leadership, Digital Transformation, Change & Transformation, Family Business, C-suite Mentoring, Turnarounds, Business Coaching, Asia & Emerging Markets, China, India, Business Models, Retail, Luxury, Private Equity, Innovation & Start-Ups

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Engage Martin Roll to drive impact

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