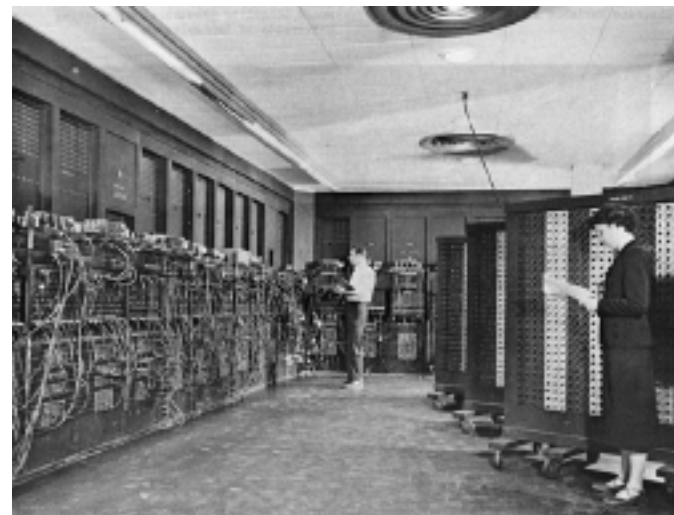


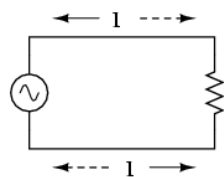
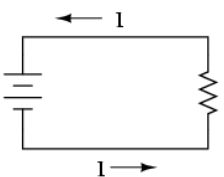
Diving into Digital

twitter: @pmabray

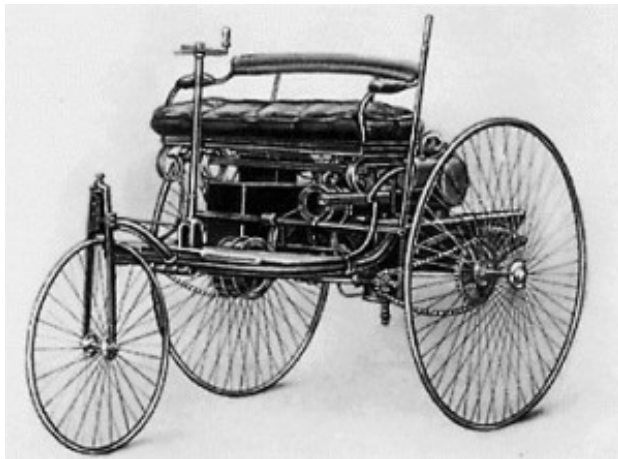


DIRECT CURRENT (DC)

ALTERNATING CURRENT (AC)



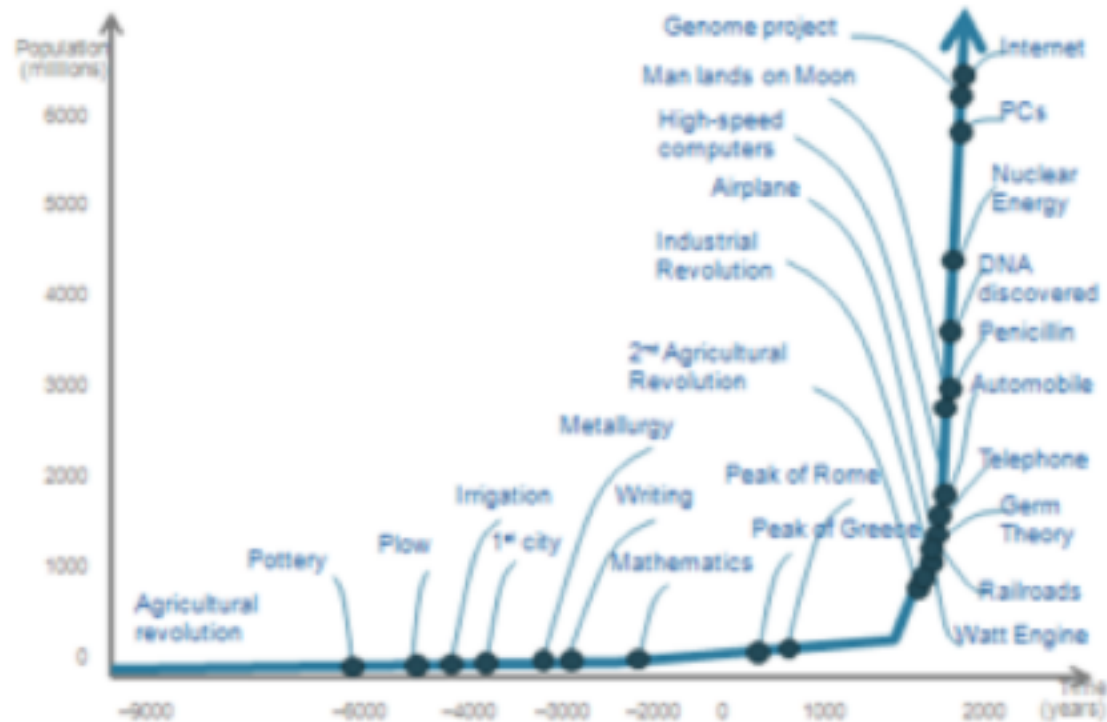
$\sin \alpha = \frac{BC}{AB} = \frac{a}{c}$
 $\cos \alpha = \frac{OB}{AB} = \frac{b}{c}$
 $\tan \alpha = \frac{OB}{BC} = \frac{b}{a}$
 $\cot \alpha = \frac{BC}{OB} = \frac{a}{b}$
 $\alpha^{\circ} = \frac{180}{\pi} \alpha$; $\alpha = \frac{\pi}{180} \alpha^{\circ}$
 $360^{\circ} = 2\pi$; $180^{\circ} = \pi$
 $\sin^2 \alpha + \cos^2 \alpha = 1$
 $\frac{\sin \alpha}{\cos \alpha} = \tan \alpha$
 $\sin \alpha = \cos \alpha \tan \alpha$
 $\frac{\cos \alpha}{\sin \alpha} = \cot \alpha$
 $\sin \alpha = \frac{1}{\csc \alpha}$
 $\cos \alpha = \frac{1}{\sec \alpha}$
 $\tan \alpha = \frac{1}{\cot \alpha}$
 $\cot \alpha = \frac{1}{\tan \alpha}$
 $\sin \alpha \csc \alpha = 1$
 $\cos \alpha \sec \alpha = 1$
 $\tan \alpha \cot \alpha = 1$
 $\sin \alpha \cos \alpha = \frac{1}{2} \sin 2\alpha$
 $\cos \alpha \sin \alpha = \frac{1}{2} \sin 2\alpha$
 $\sin^2 \alpha = \frac{1 - \cos 2\alpha}{2}$
 $\cos^2 \alpha = \frac{1 + \cos 2\alpha}{2}$
 $\sin 2\alpha = 2 \sin \alpha \cos \alpha$
 $\cos 2\alpha = \cos^2 \alpha - \sin^2 \alpha$
 $\tan 2\alpha = \frac{2 \tan \alpha}{1 - \tan^2 \alpha}$
 $\sin \alpha = a \sin \omega t + b \cos \omega t$
 $\alpha > 0$
 $\sin \left(-\frac{b}{2a}, \frac{4a}{a} \right)$
 $\Delta = 4ac - b^2$
 $a > 0$
 $\tan \varphi = \pm a^2 \left(\frac{b}{a} \right)^2$



Multiple Technology Revolutions

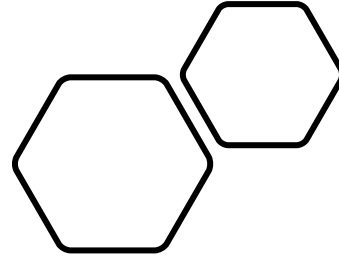
- Rapid growth in computing innovation leads to subsequent new revolutions
- Moore's Law is now applicable to more than computing, which means several technologies are evolving exponentially at the same time

The History of Technology



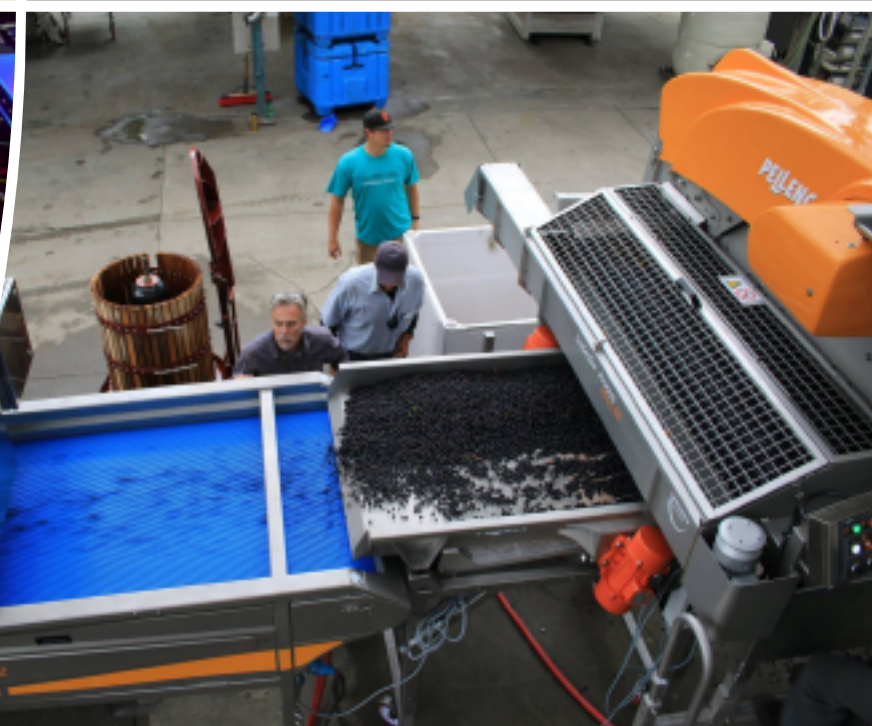
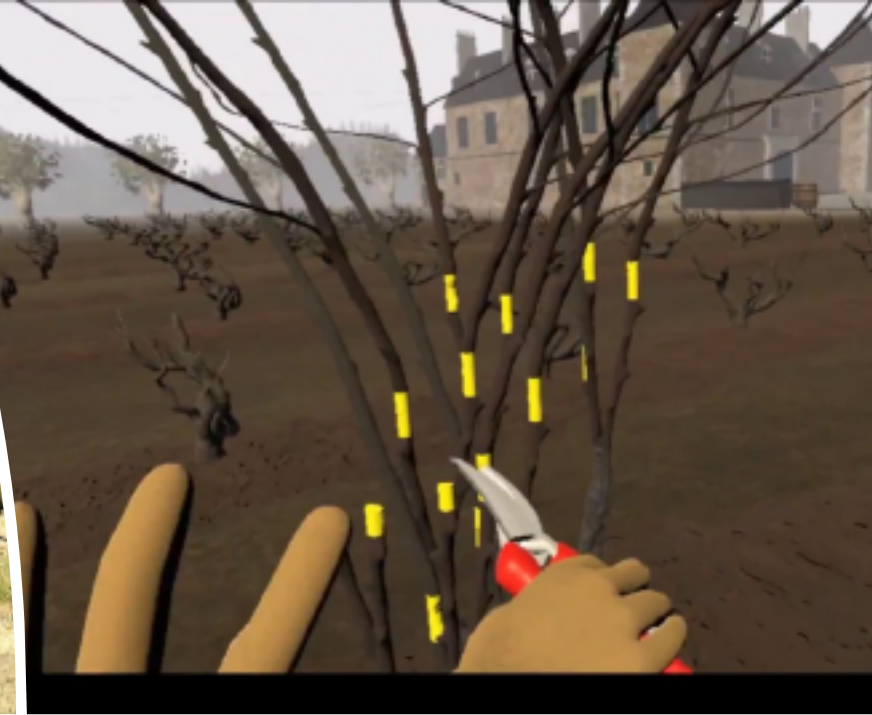


Innovation in Wine



Production

- Optical Scanners
- Drones
- Big Data re:
Vineyard
management



And can I get an email address where we can send you reminders three times a week that we sell wine?

4
© DAN
BIZARRO
6-23-16



Wine Marketing



Packaging



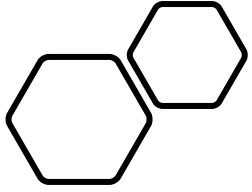
FOOD & DRINK / WINE

Has This \$3,500 Bottle of Wine Just Set the New Bar for Napa Cabernet?

Fairchild and Melka made just 300 (big) bottles of Perrarus.



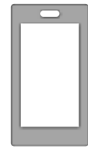




Macro Trends



Wine



Digital



Ecommerce



Block Chain



Ad Tech

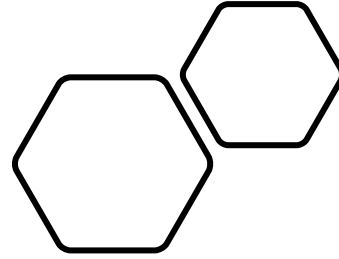


BI/AI



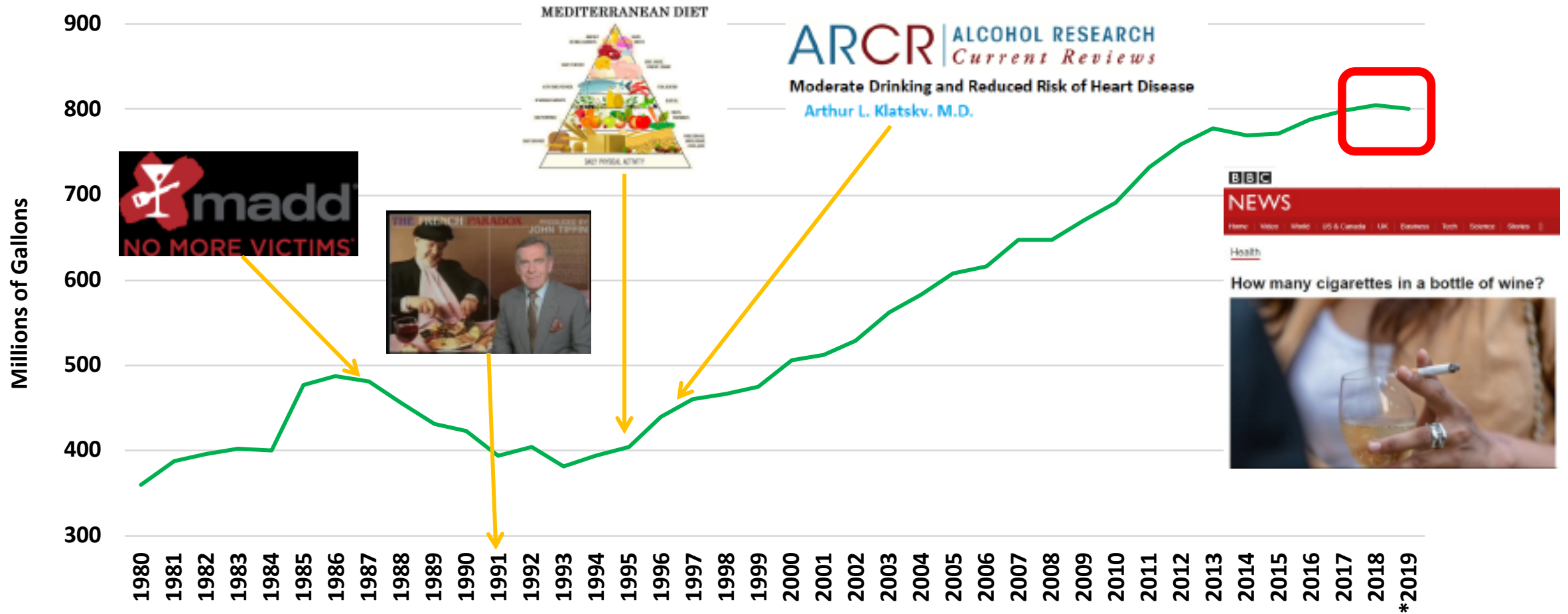
Big Data

Wine



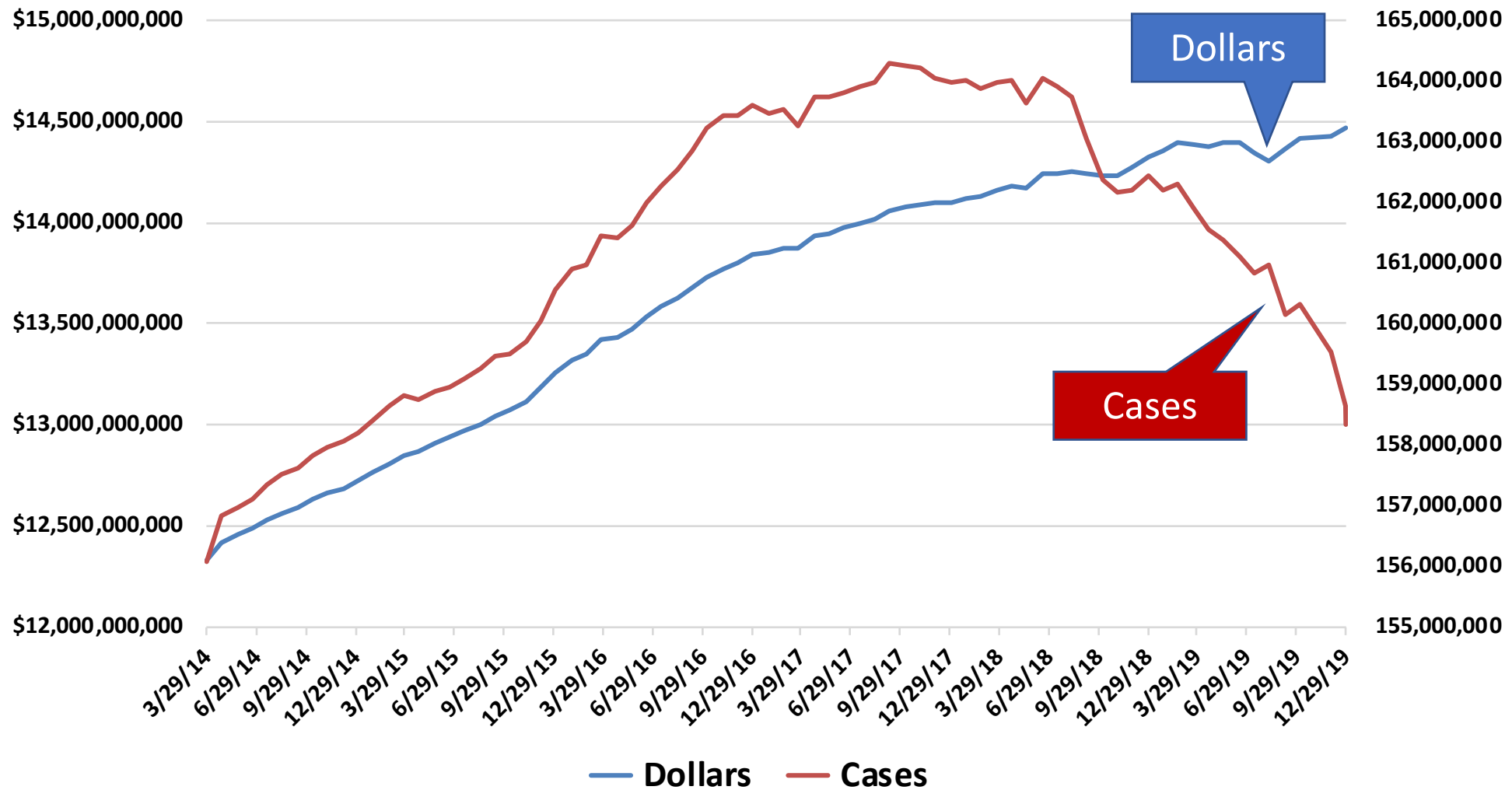
Total US Table Wine Consumption is Flat ... at Best

Long Term Wine Trends 1980 to the Present



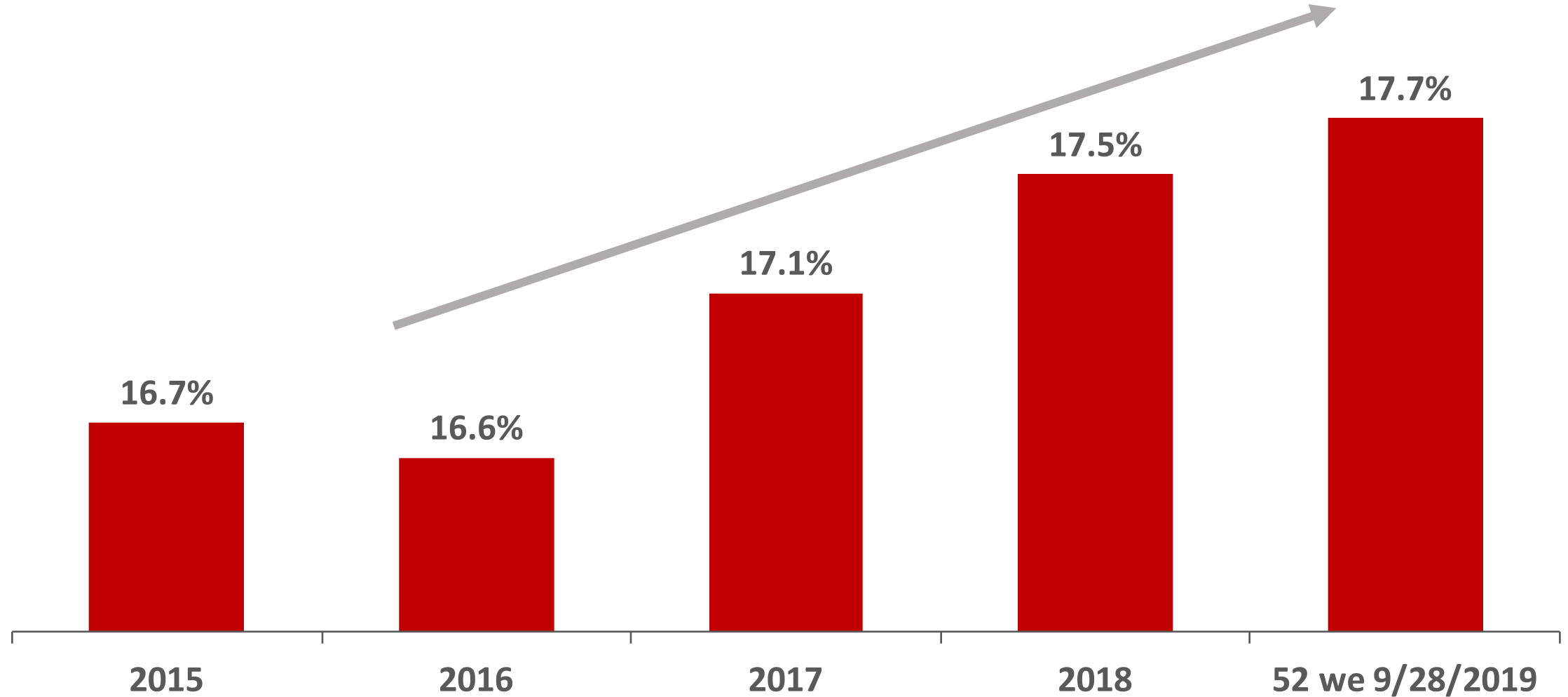
Current US Off-Premise Wine Sales Trends 2014 - Present

Volume Turned Negative 2017. Value has flattened. Some Channel Shifting.



Private Label Wine Channel Growing

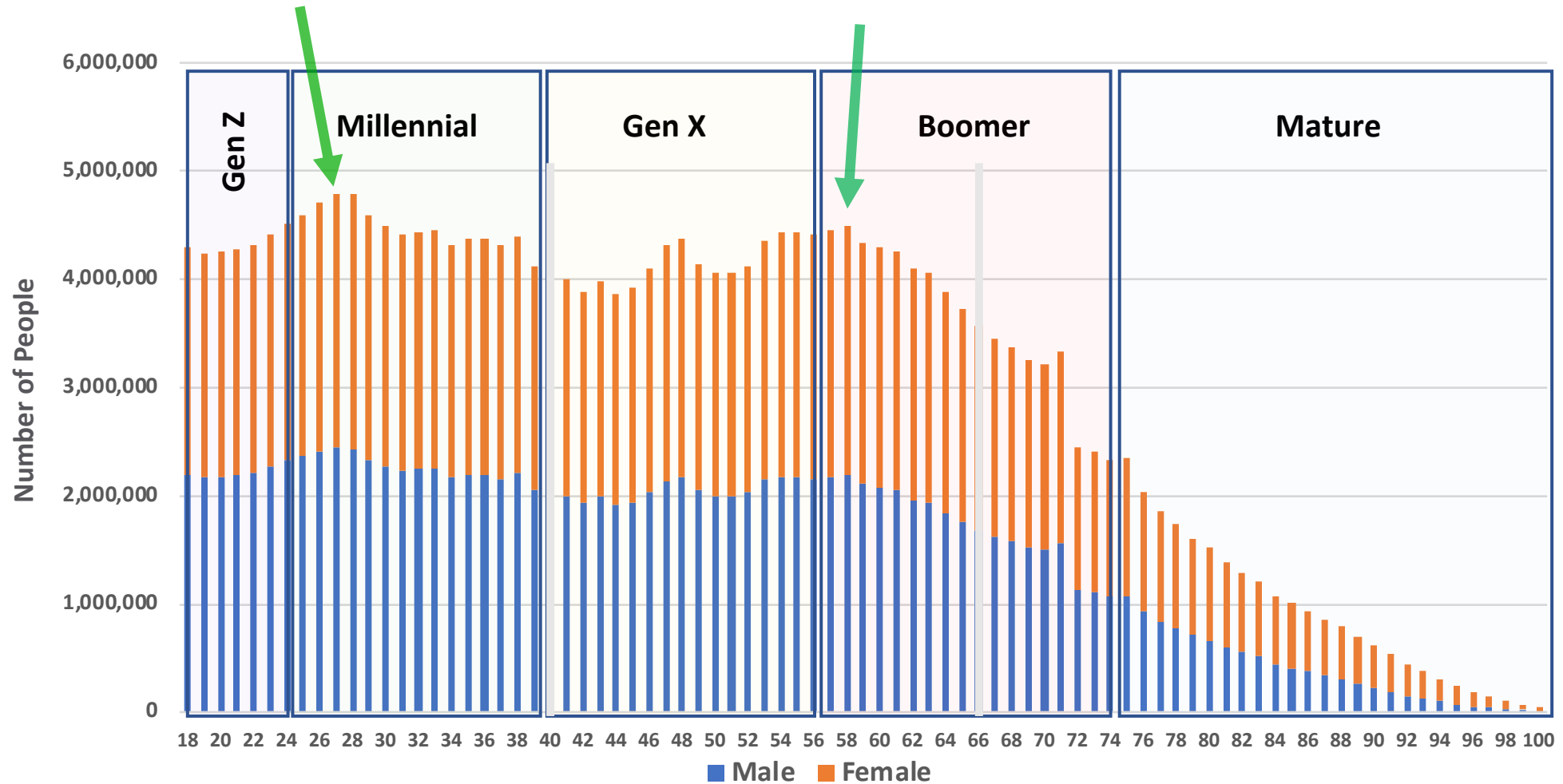
Category Plays to Frugal Consumer's Pocket Books



Source: Nielsen Retail Measurement Services, 2015, 2016, 2017, 2018, and 52 weeks ended 9/28/2019

Population is Hitting Milestones. The Current Wine Consumer is Aging.

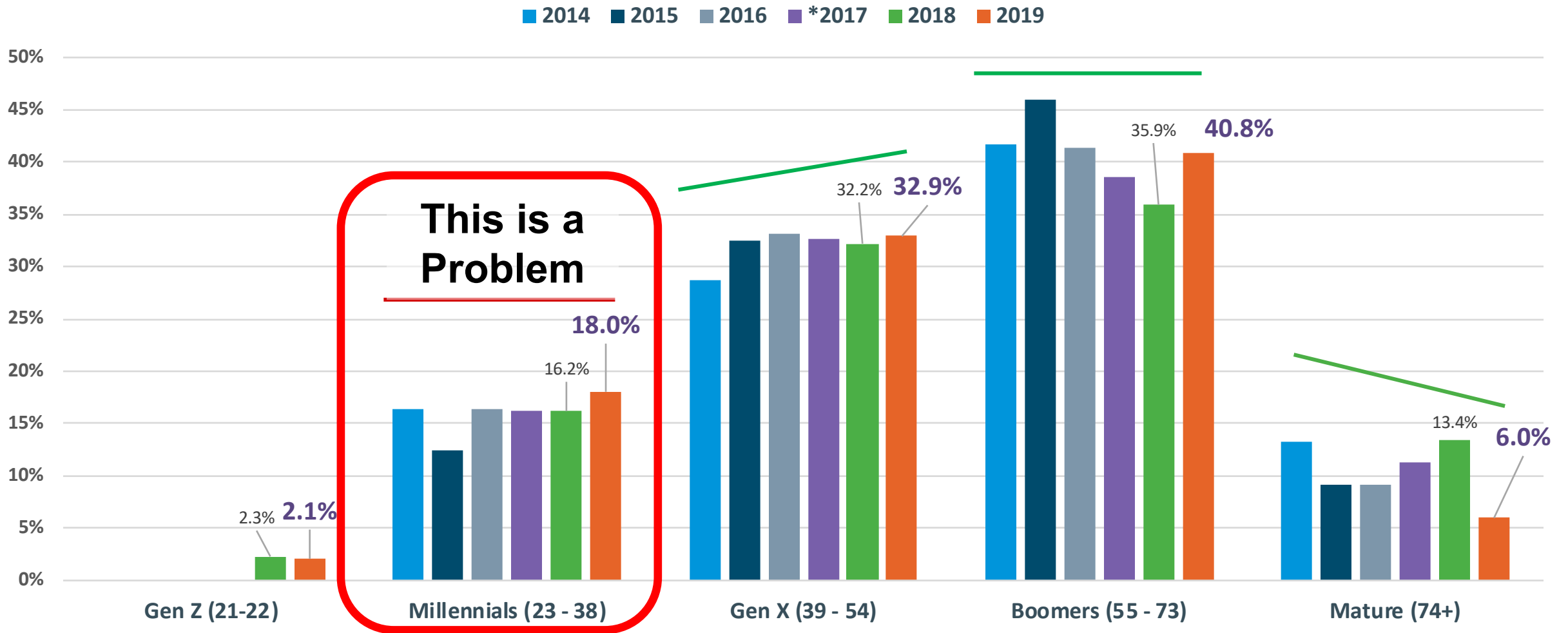
The New Consumer Opportunity is Younger than Today



Source: U.S. Census Bureau

Which Consumers does Washington Attract?

Washington is Attracting the Same Age Consumers as other Regions

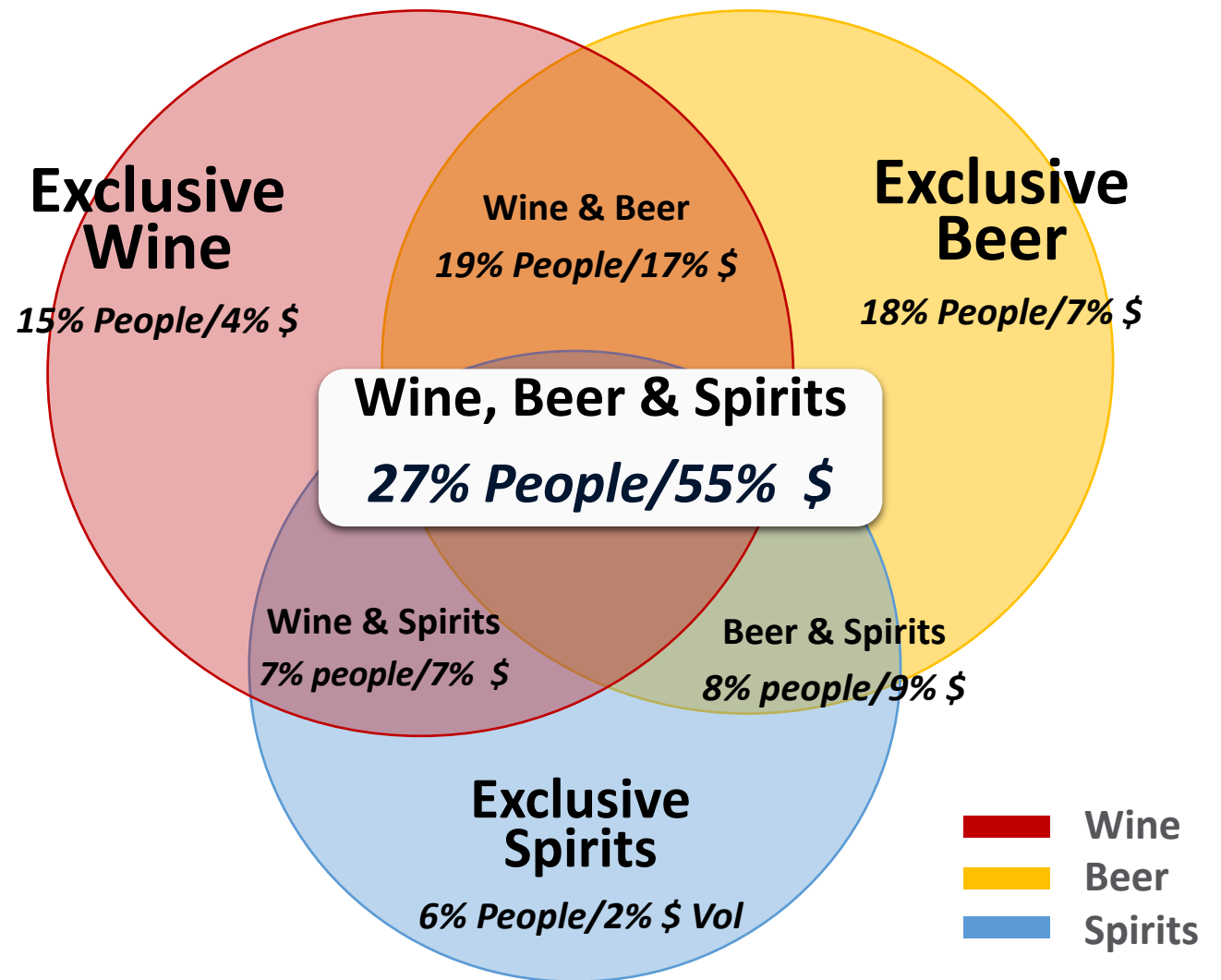


Source: SVB Winery Conditions Survey, 2019

Most Wine Consumers Drink Across Categories

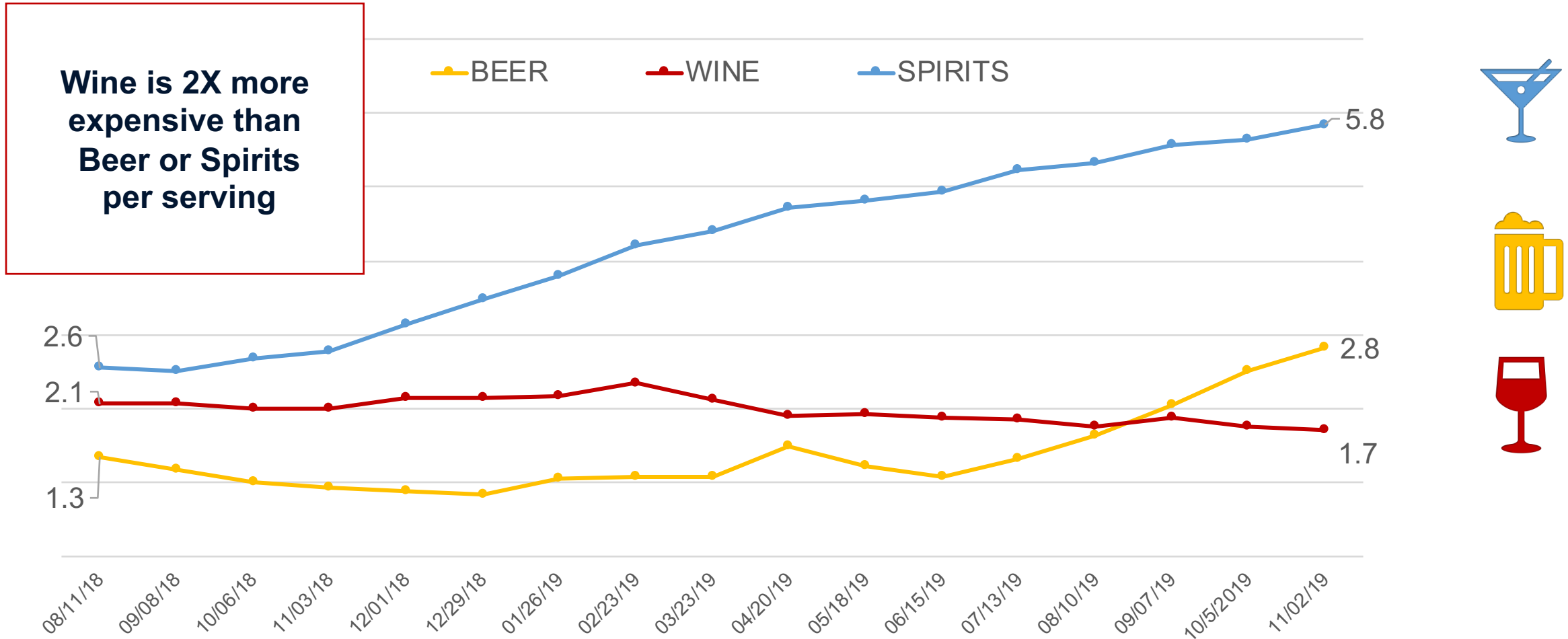
Only 15% of drinkers are exclusive to wine.

Competition is from
Spirits, Seltzer
& Craft Beer



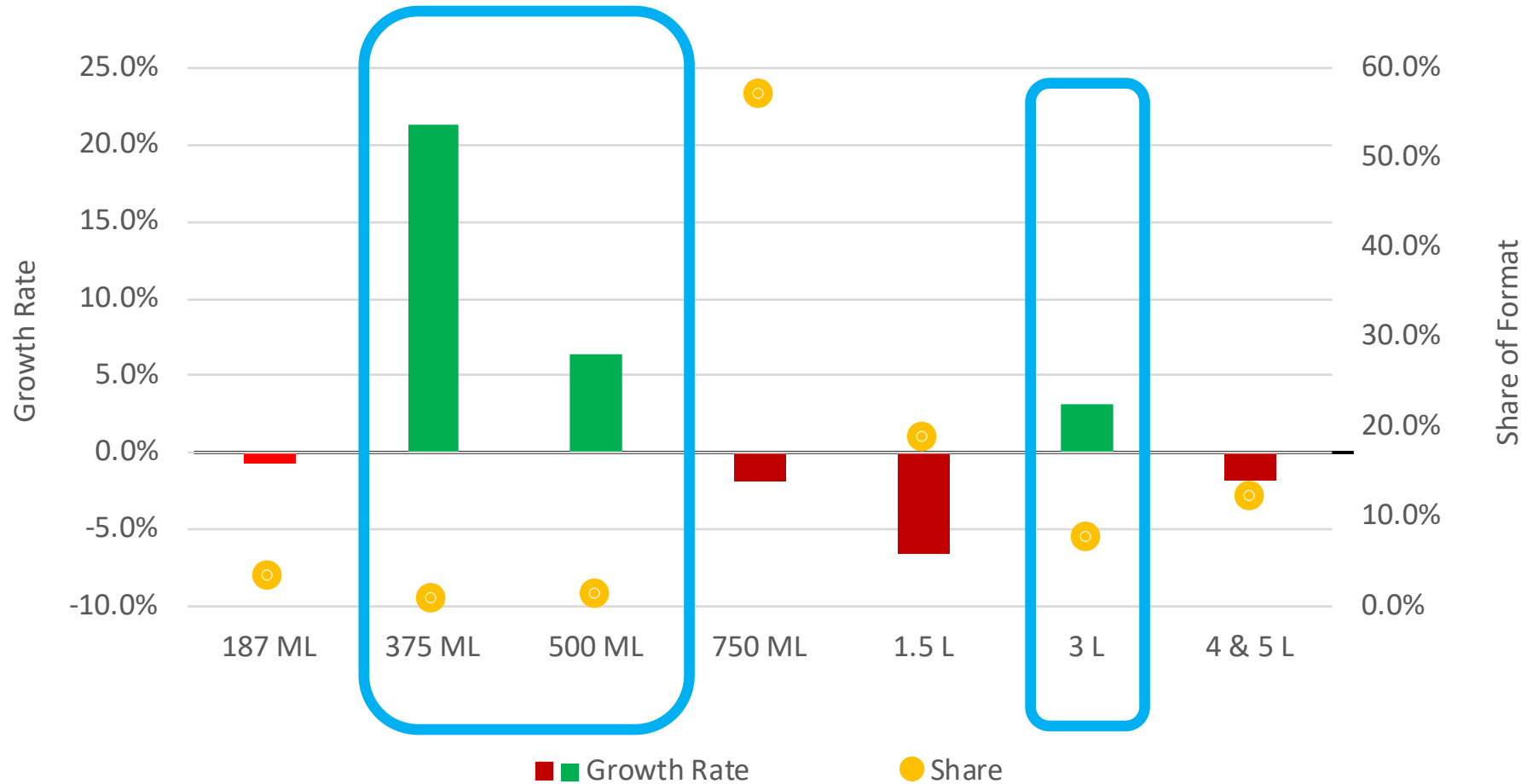
More Alc. Bev. Consumers Are Selecting Spirits

Spirit Producers Are Better at Marketing Compared to the Wine Community



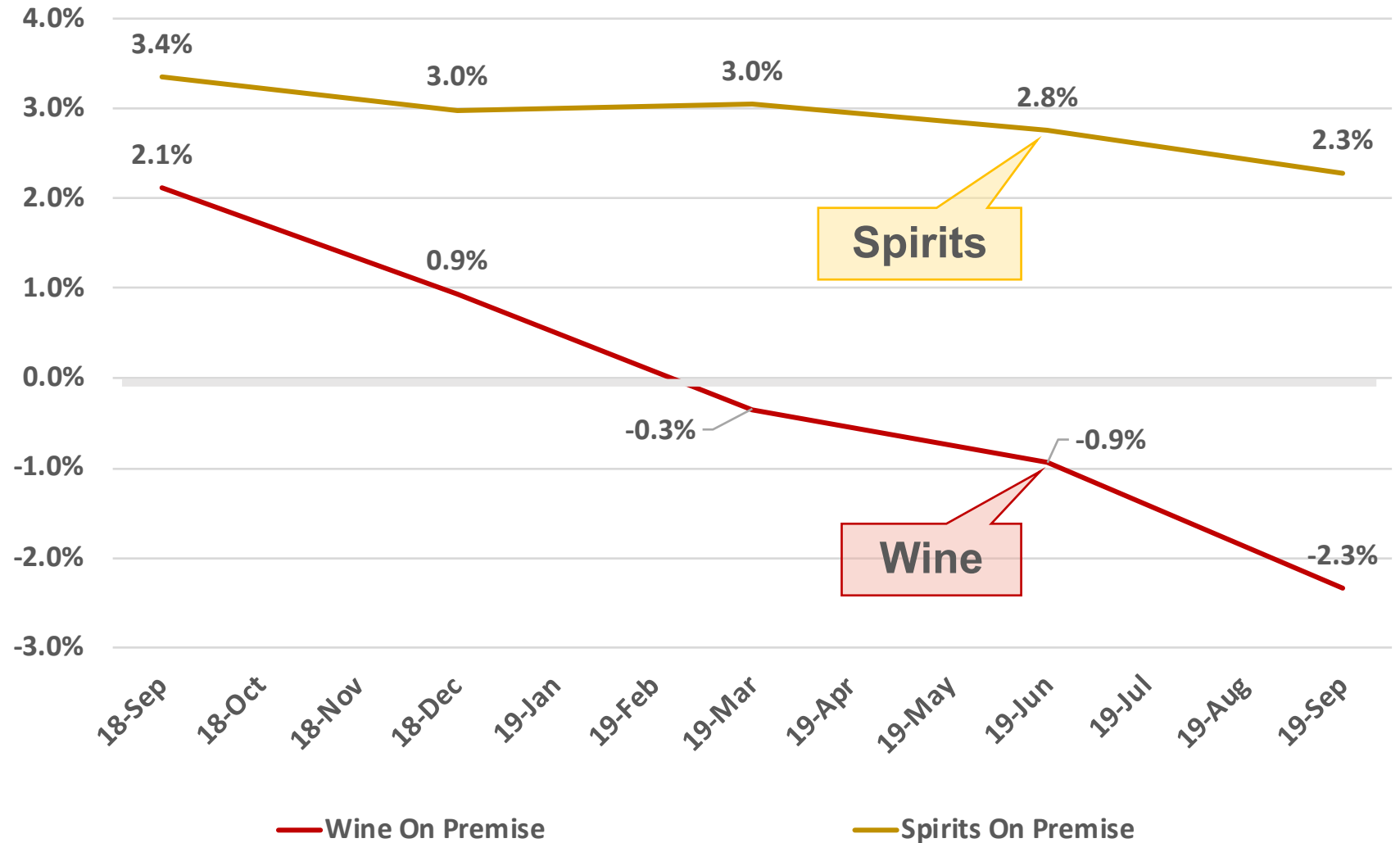
Growth & Share of Formats

Smaller ad Alternative Formats Growing – Old & Younger Drinkers



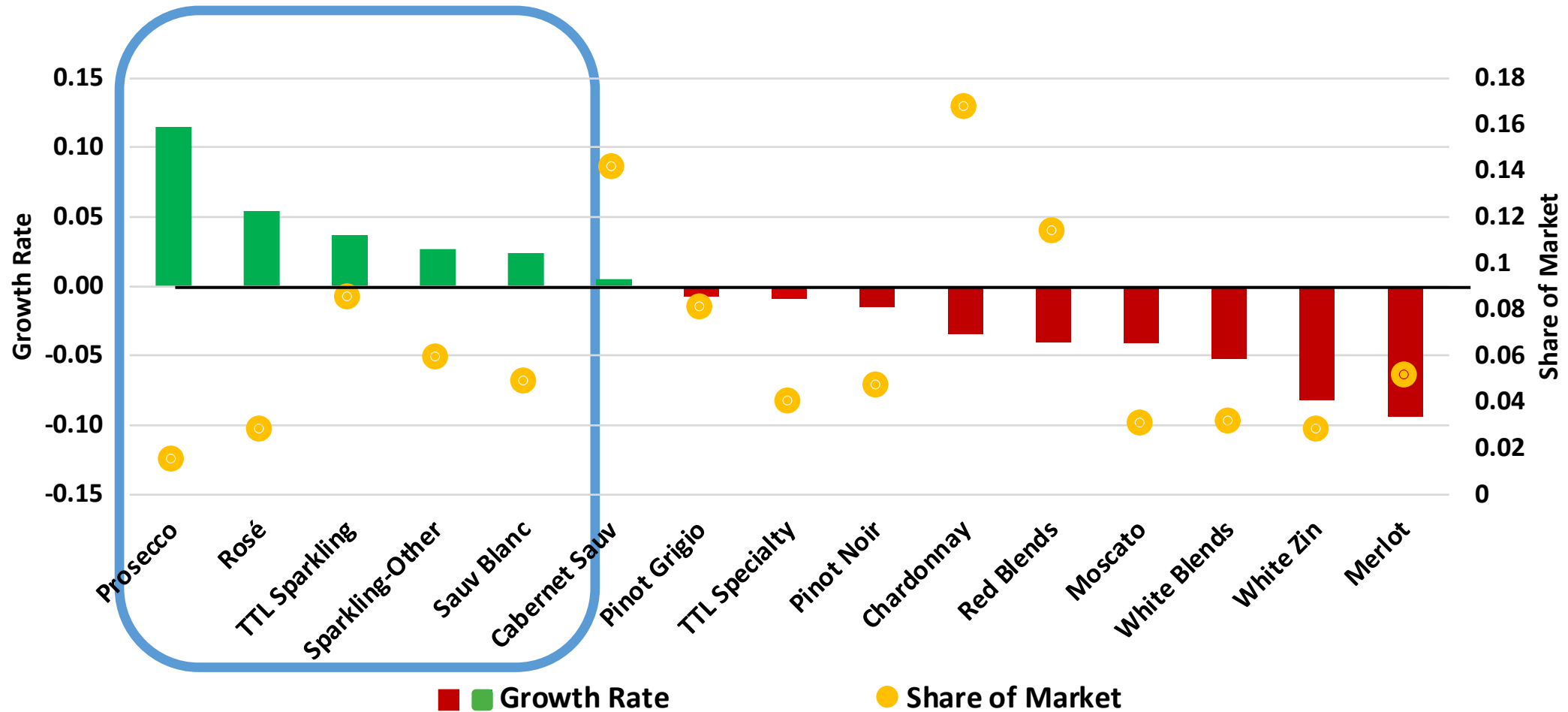
Wine Consumer Opting out of Restaurants: Alc. Bev. Is Suffering

By-the-Glass
Programs Suffer
in Restaurants
Today

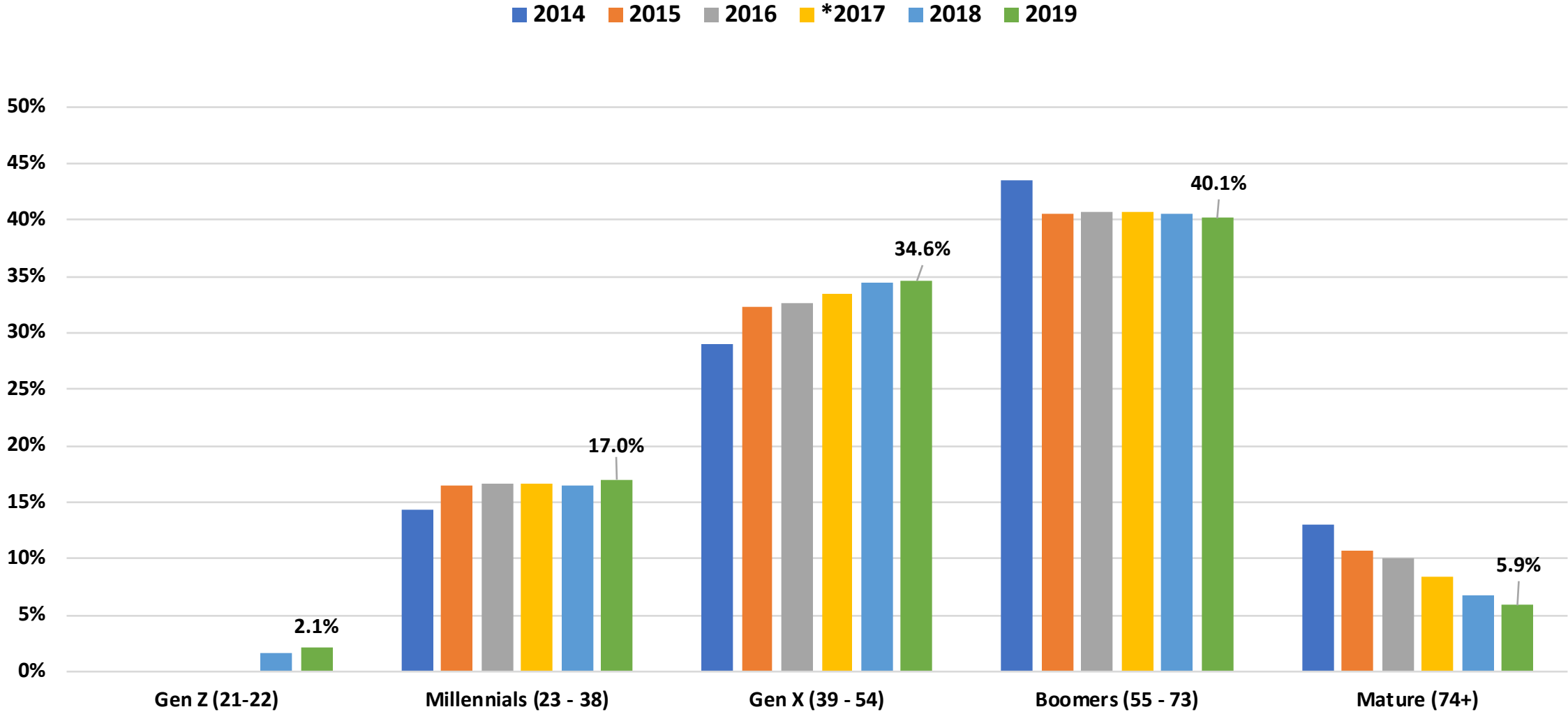


Younger Consumers Fingerprints on Varietal Growth

Bubbles & Rosé Leading Growth – Both Skew to Younger Drinkers



Wine Consumption by Cohort



Source: SVB State of the Wine Industry Survey

IF OLDER CONSUMERS HAVE
MORE BUYING POWER, WHY DO
MARKETERS SEEM TO IGNORE
ANYONE OVER THE AGE OF 35?



DID YOU
HEAR
SOME-
THING?



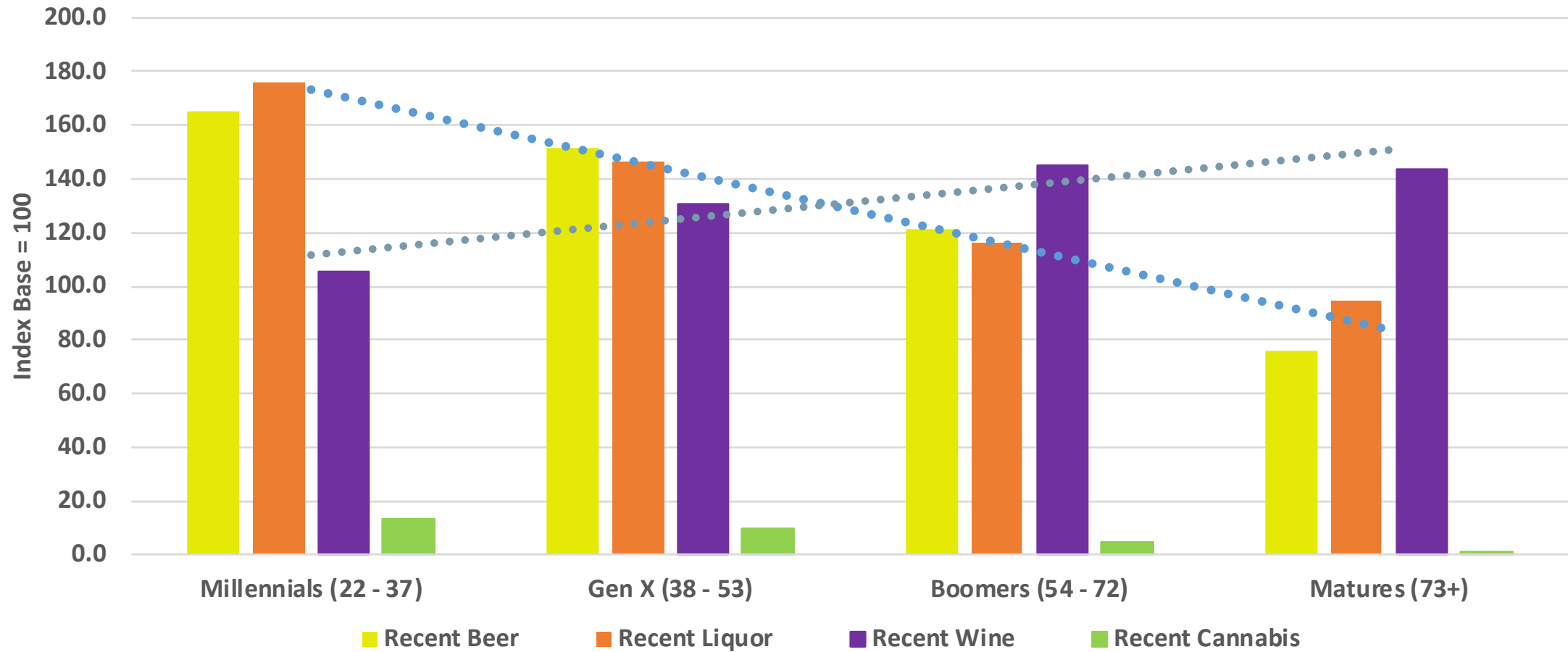
NOTHING
IMPOR-
TANT.



TOM
FISH
BURNE

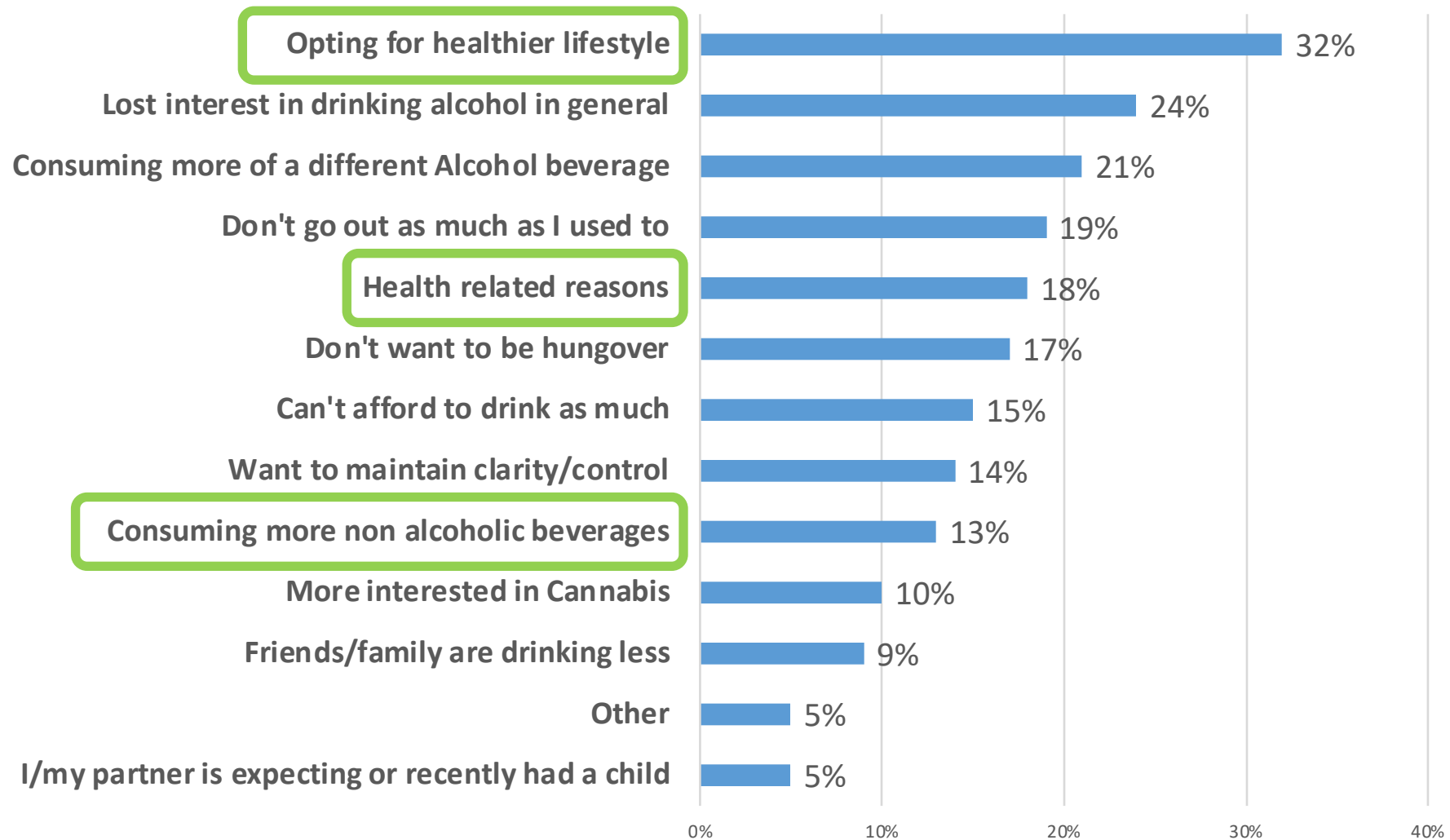
Younger Consumers and Spirits and Beer Consumers

Will Younger Consumers Continue to Move to Wine as they Age?

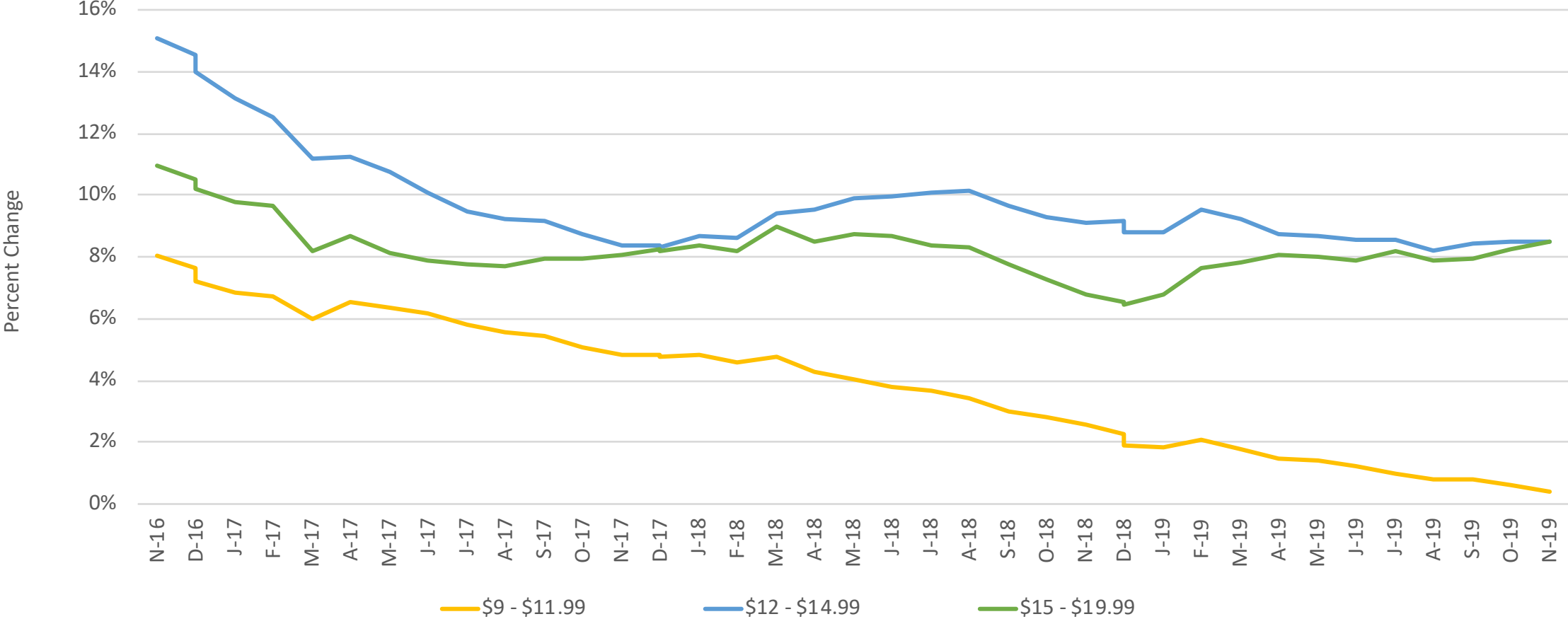


Why are Younger Consumers Cutting Back

63% Cited Health as the Main Reason



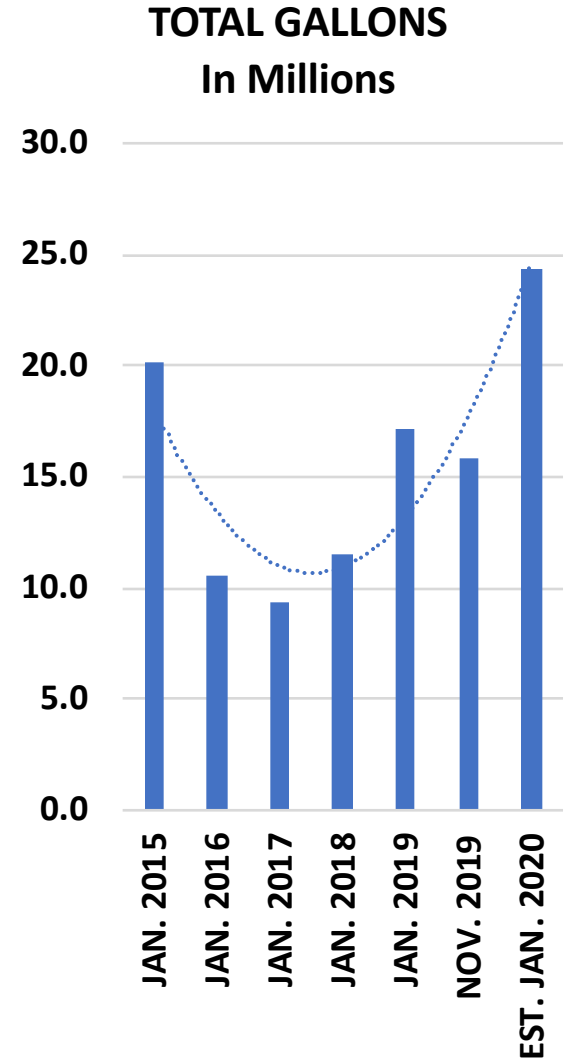
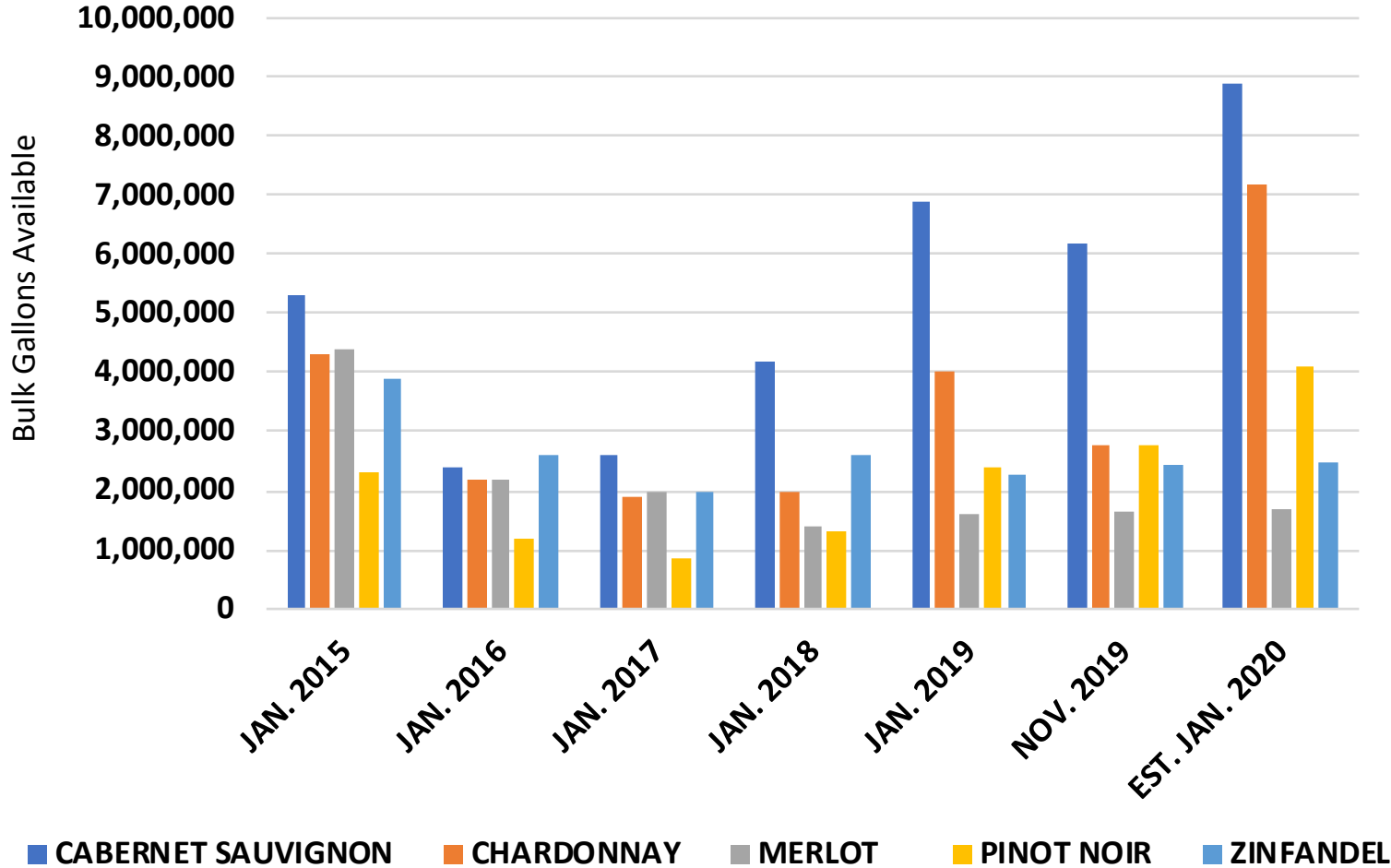
Growth Rate in Volume Between \$9 - \$19.99



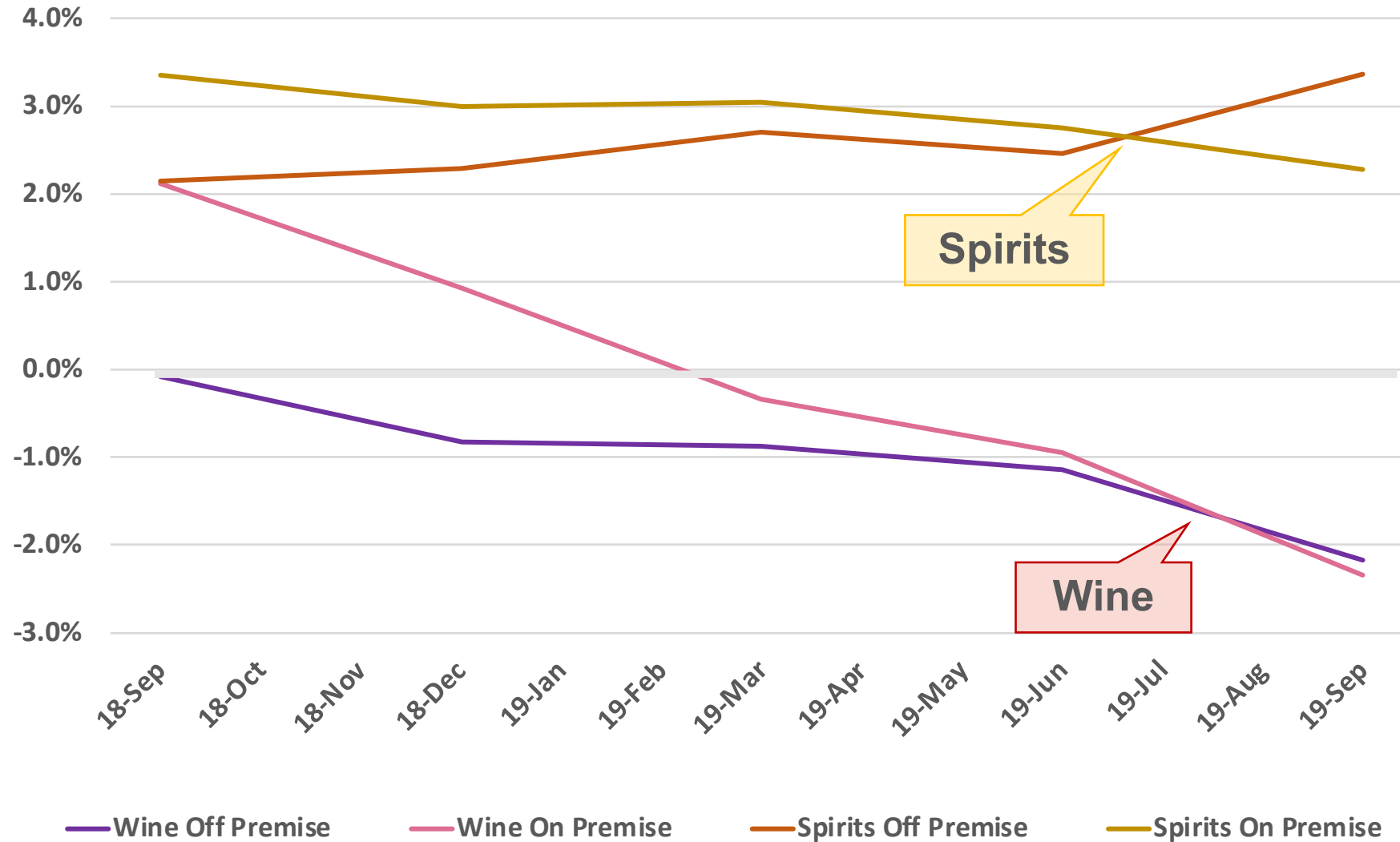
Source: Nielsen – Rolling 52 Week 11-2019

Acute Over Supply in Market

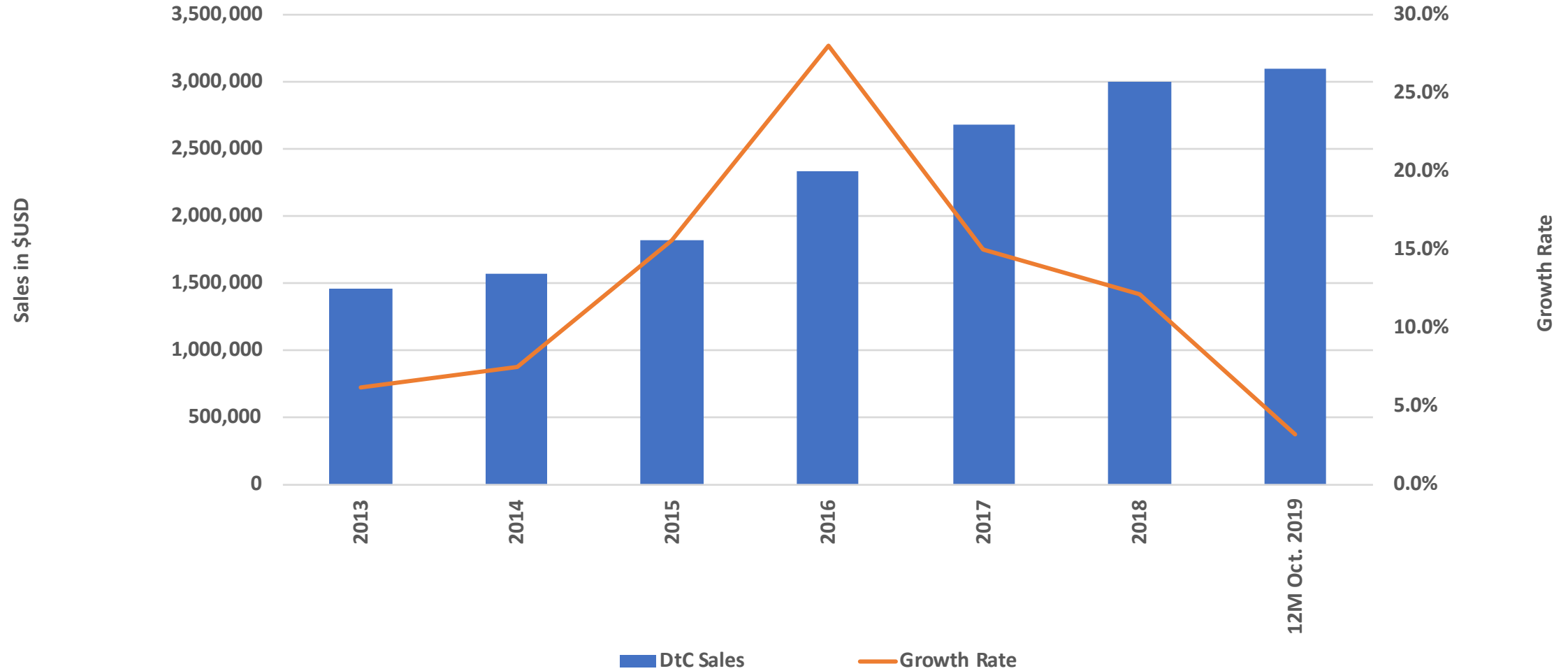
California Bulk Wine Inventory
*Jan 2020 Est.



Wholesale Depletions of Wine & Spirits

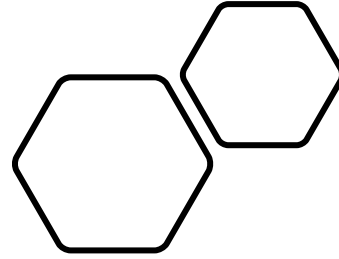


Annual Sales & Growth Rate Direct to Consumer



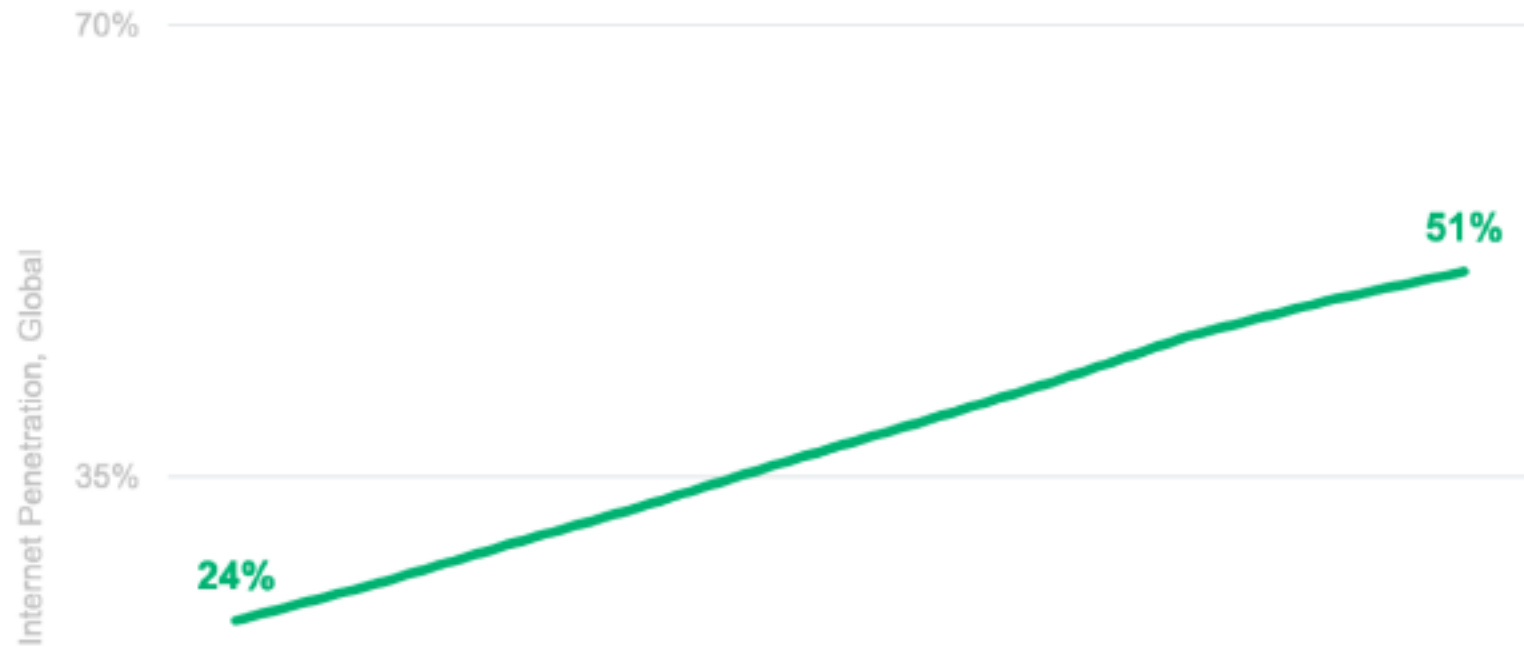
Source: Wines Vines Analytics/ShipCompliant

Digital



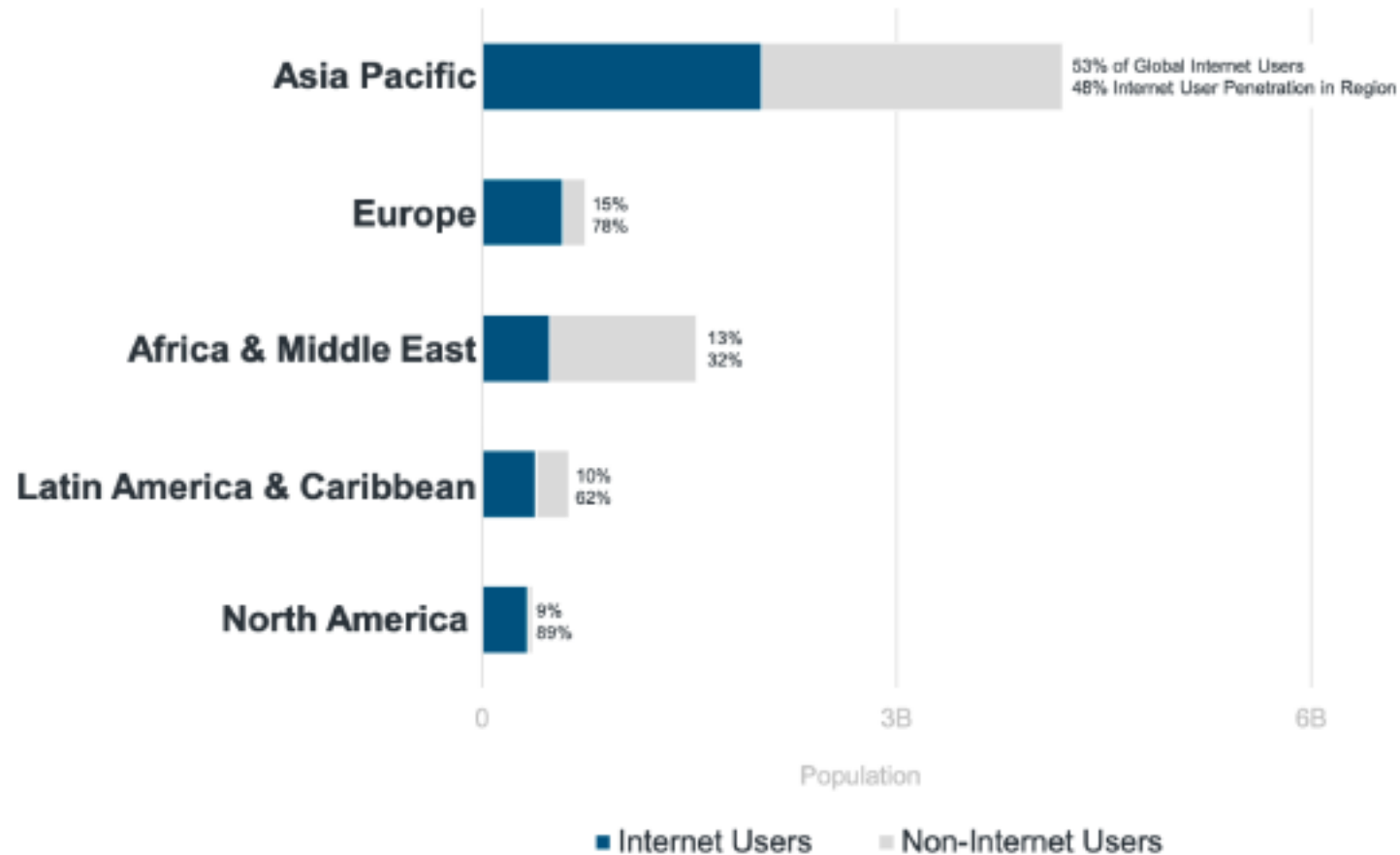
Global Internet Users =
3.8B >50% of Population

Internet Penetration, 2018

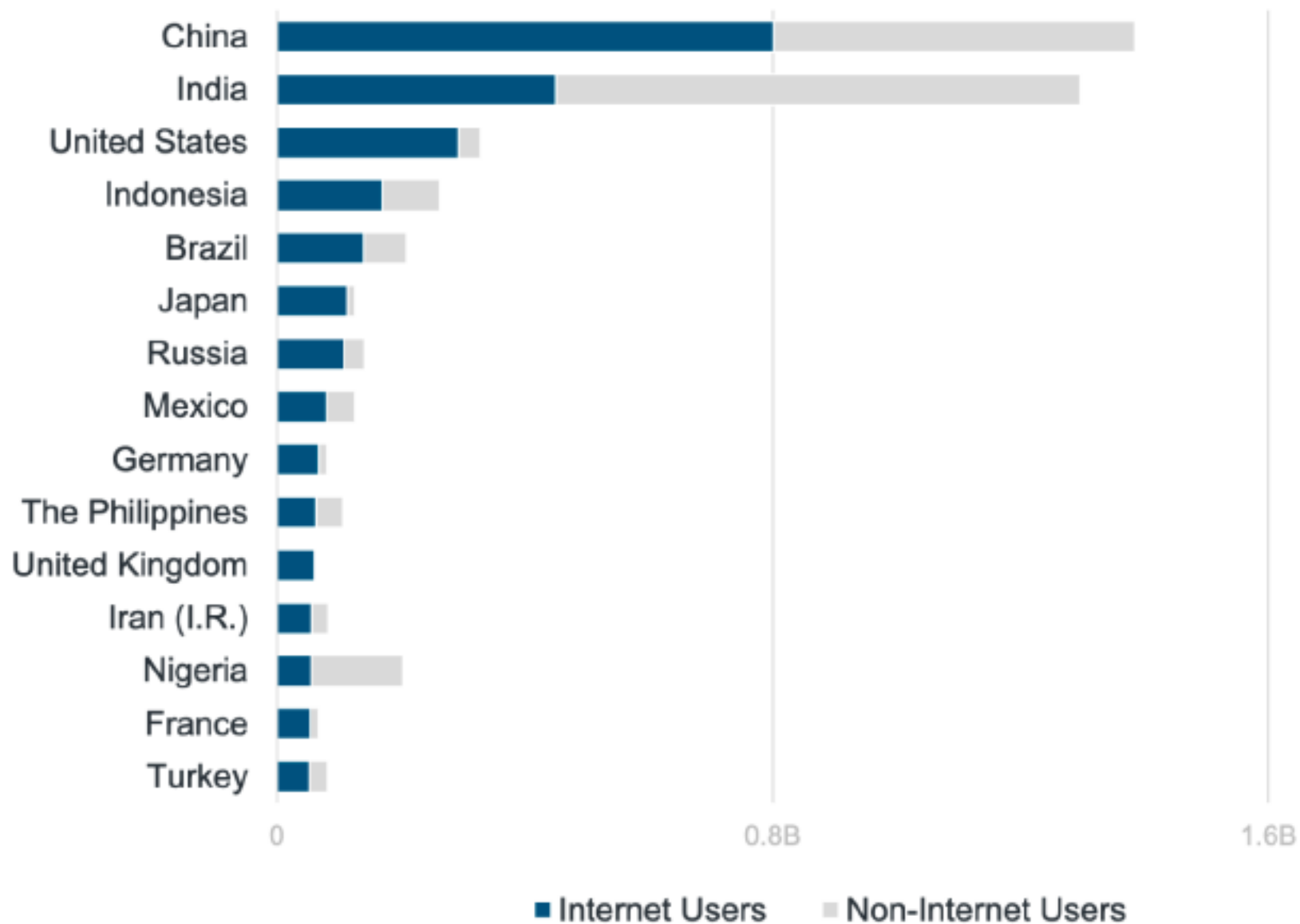


Global Internet Users = Asia Pacific Leads in Users + Potential

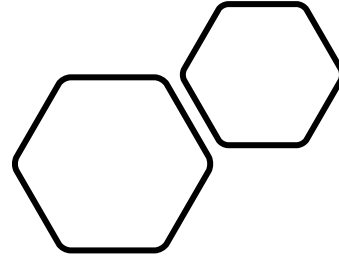
Internet Users by Region, 2018



Internet Users – Top Countries, 2018



E-Commerce

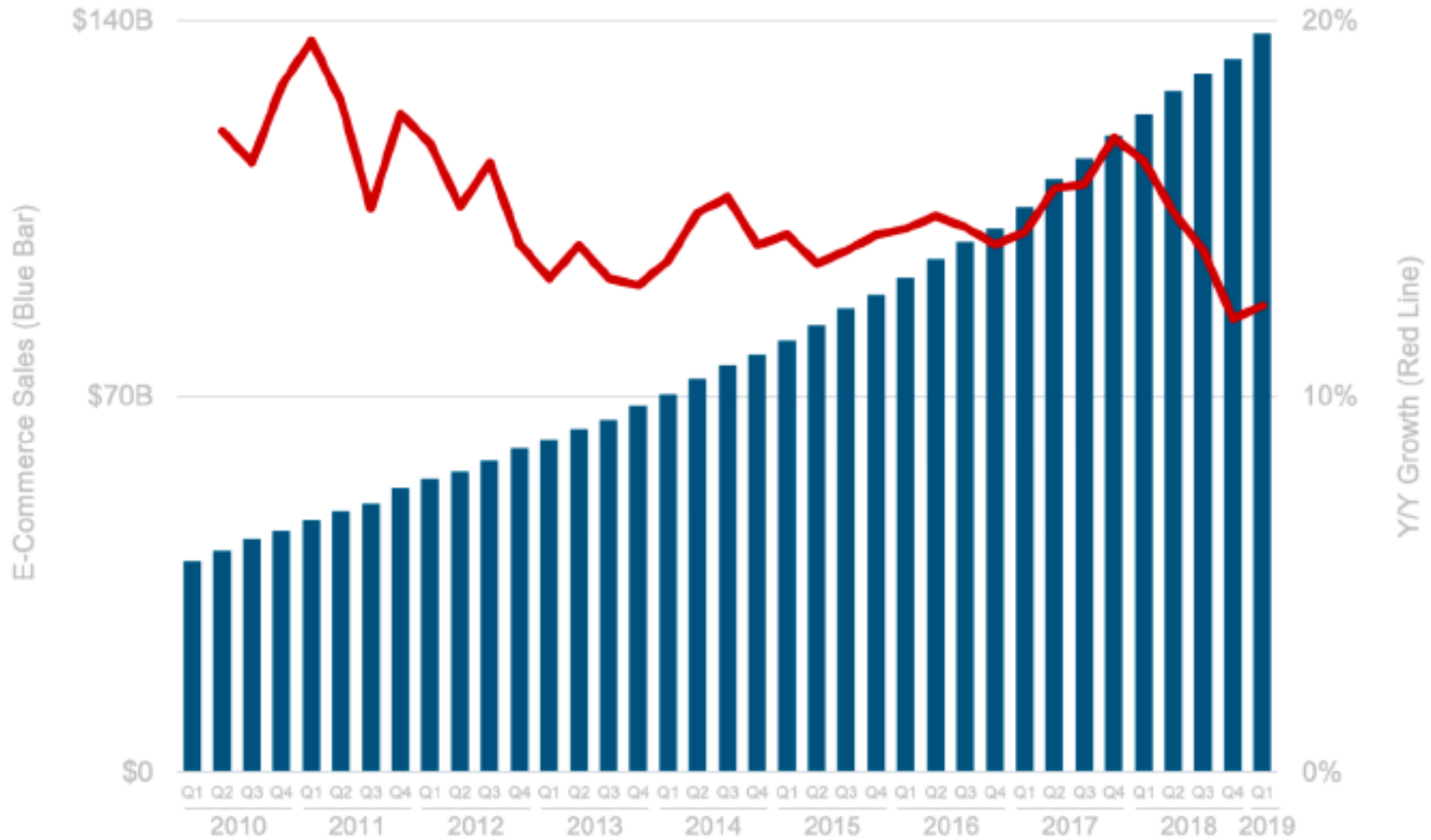


E-Commerce Share = Gains Continue @ 15% of Retail vs. 14% Y/Y

E-Commerce as % of Retail Sales, USA



E-Commerce Sales vs. Y/Y Growth, USA



Marketplaces Eat Markets

aka The Amazon Effect

amazon

The Amazon logo, featuring the word "amazon" in a bold, lowercase, sans-serif font. Below the text is a grey, stylized smile that forms the shape of the letter "a". The smile is composed of a series of small, sharp, upward-pointing teeth or spikes, giving it a jagged, toothy appearance. The smile starts under the 'a' and ends under the 'n', curving upwards at the ends.

Historical disruption in retail has followed similar patterns

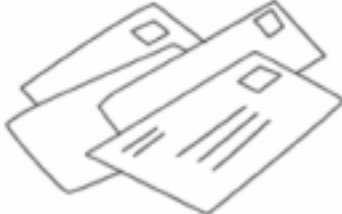
Amazon Effect

Department Stores
First Disruption



3 Times/Yearly
Margins: ~40%

Mail Order Catalogue
Second Disruption



4 Times/Yearly
Margins: ~30%

Big Box Retailers
Third Disruption



5 Times/Yearly
Margins: ~20%

E-Commerce
Fourth Disruption



25 Times/Yearly
Margins: ~5%

1900

1950

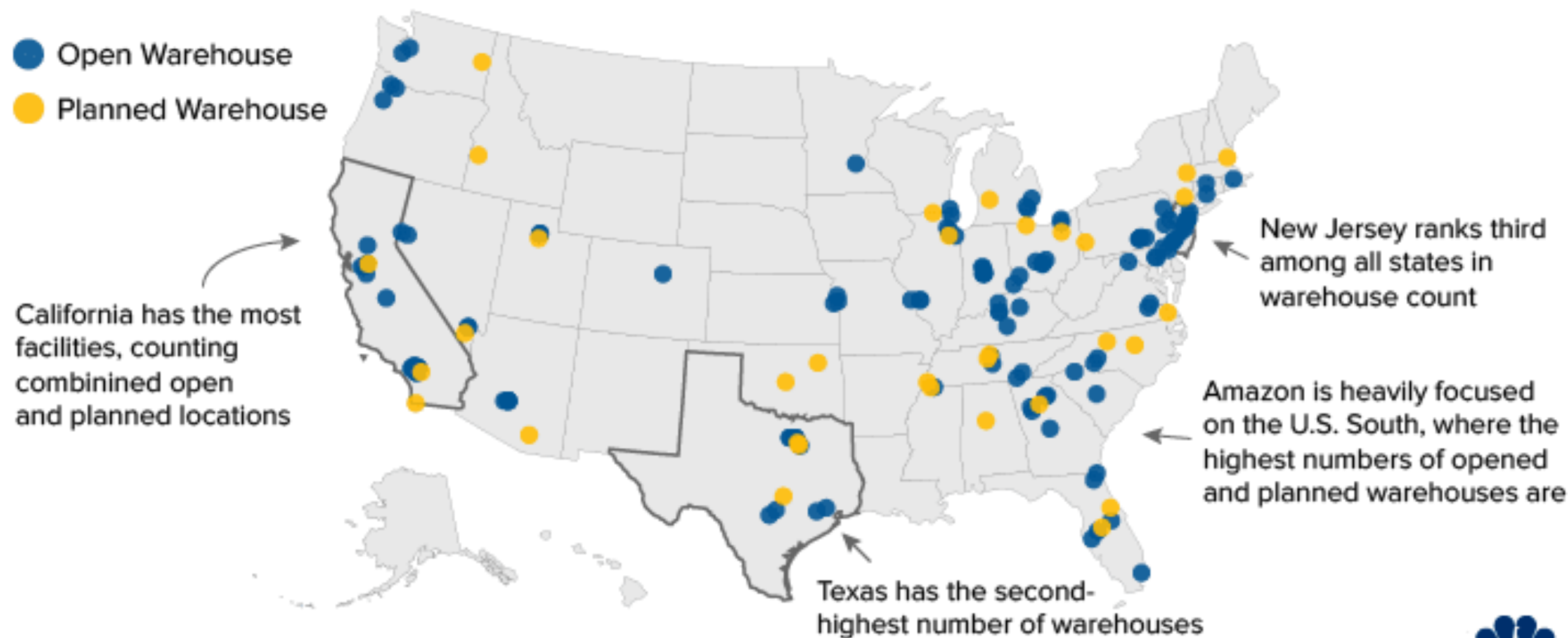
2000

Source: Appendix Slide 49

© Copyright 2013 Innosight LLC

Amazon fulfillment centers across the US

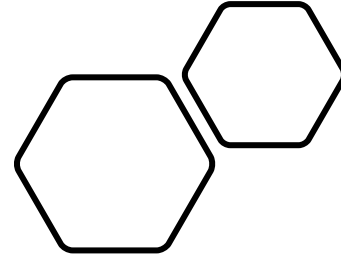
The company has over 100 active warehouses and dozens of planned locations



SOURCE: MWPVL International Inc., Supply Chain and Logistics Consultants. Includes warehouses of 500,000 square feet or more.



Social Media



Social Media

CONVERSATION PRISM 5.0

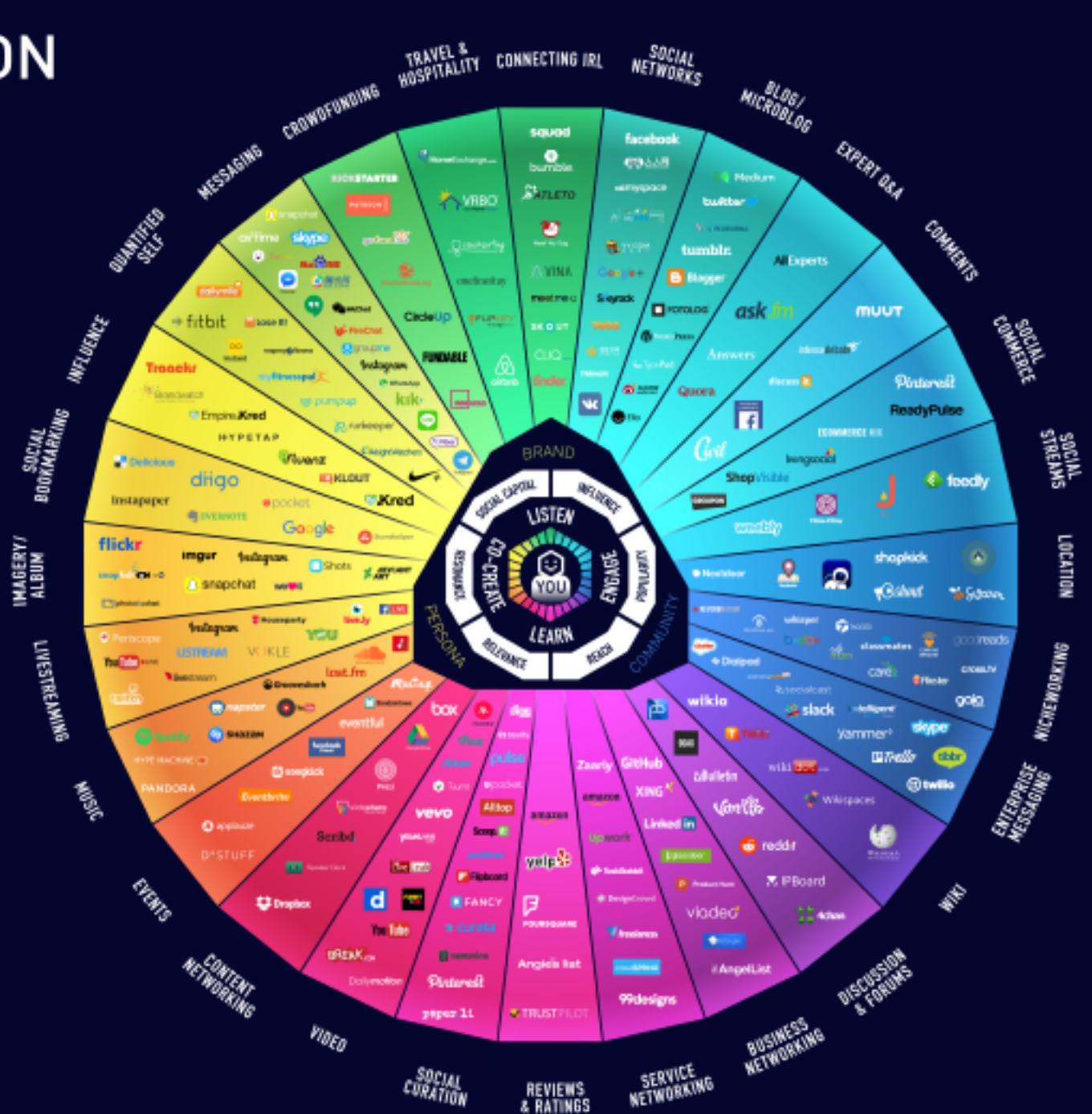
Brought to you by
Brian Solis & JESS3

Social Media Gave Everyone a Voice

The Conversation Prism debuted in 2008 as social media was exploding online. Social media would change everything about how we communicate, learn and share. It forever democratized information and reset the balance for influence.

The Conversation Prism was designed as a visual map of the conversational networks that continue to reshape everything. Its purpose is to help you understand and appreciate the statusphere so that you can play a productive and defining role in the conversations shaping our future.

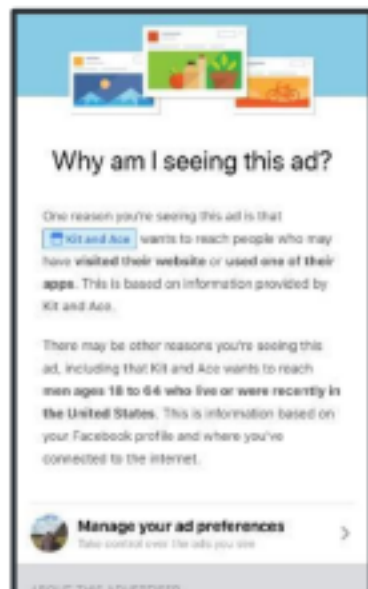
For more information check out conversationprism.com



Ad Share Gain Drivers = Better Targeting + New Creative + Commerce + High-Relevance

Facebook

Targeting
Audience Customization



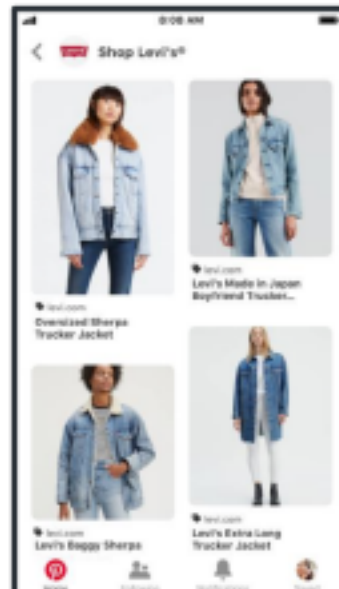
YouTube

Machine Learning
Automatically Time-Edited Clips



Pinterest

Commerce
Shoppable Catalogs



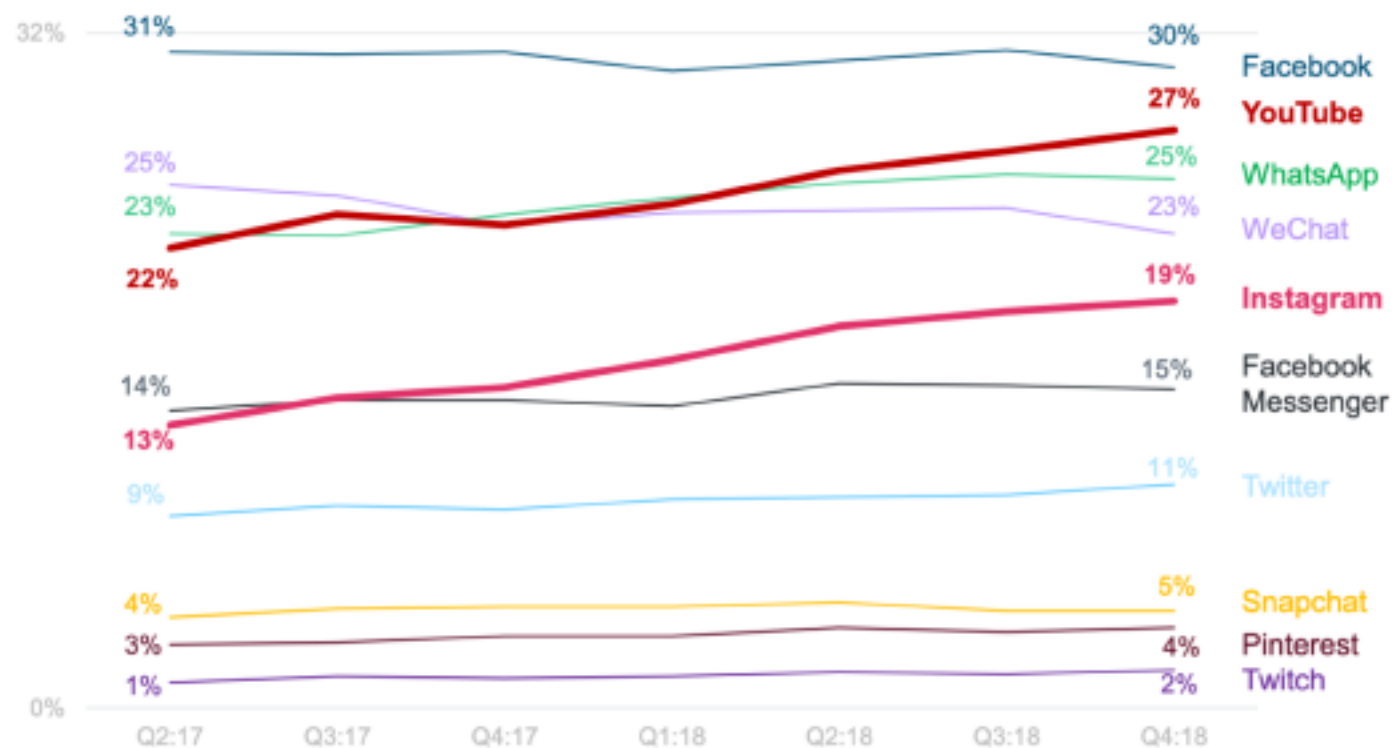
Twitter

High-Relevance
Promoted Tweets



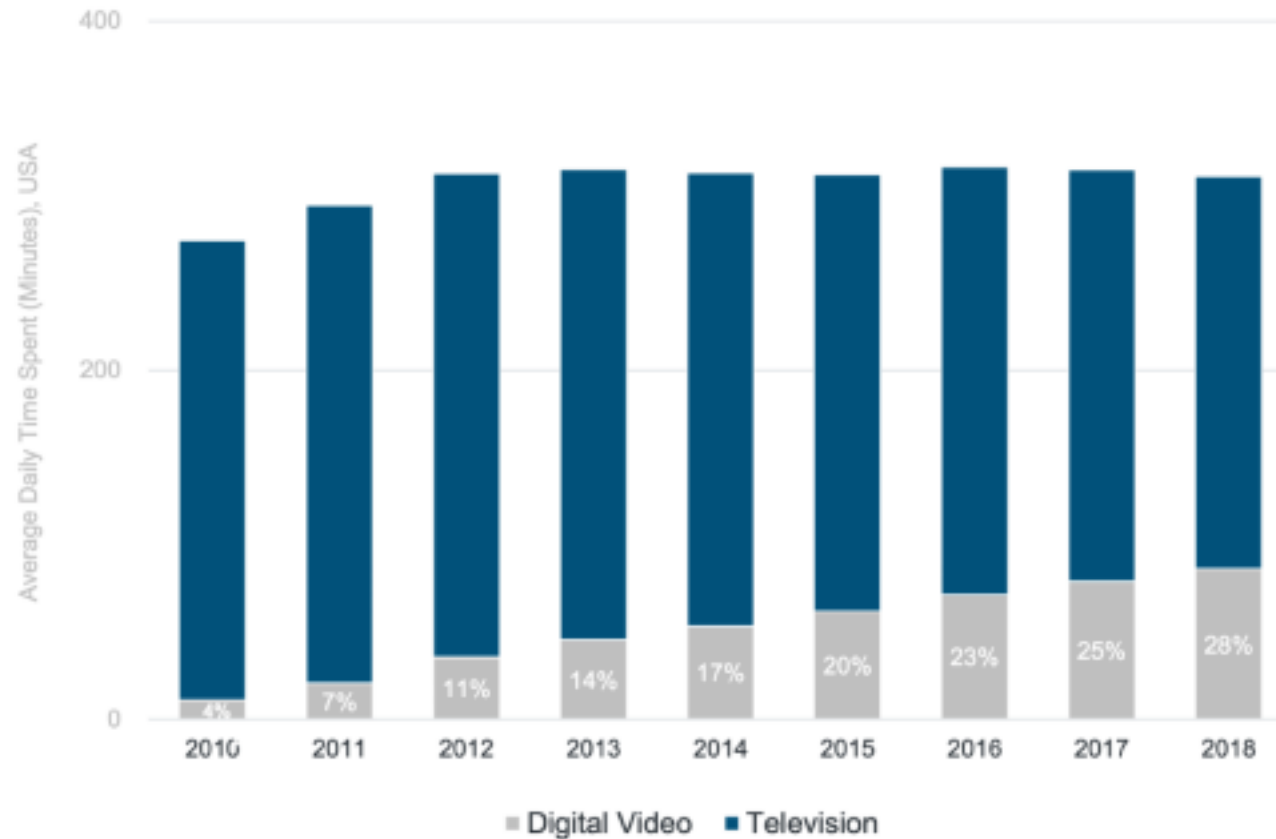
Online Platform Time = YouTube + Instagram Gaining Most

% Internet Users Using Select Platforms > 1x per Day, Global*



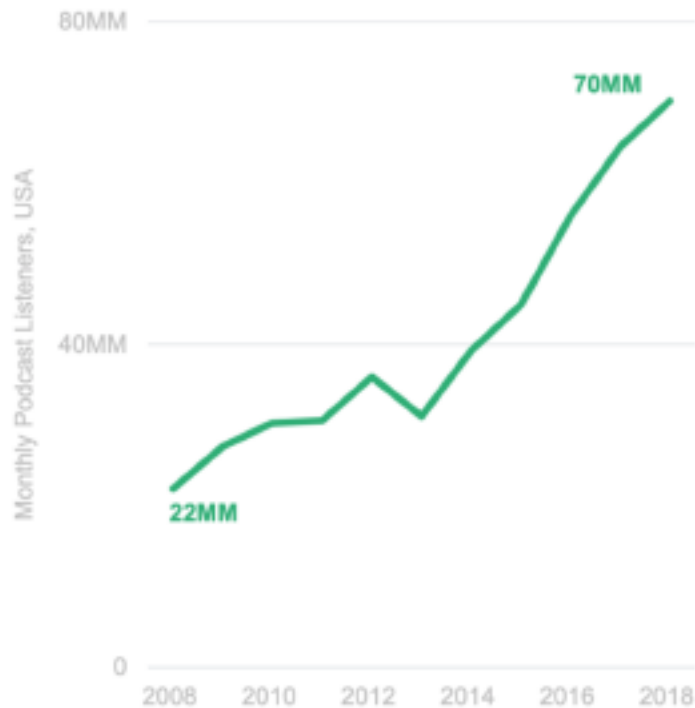
Video Time = Digital +2x in Five Years @ 28% of Total (vs. TV)

Video Watching Daily Minutes – Digital vs. TV, USA



Voice = 70MM Podcast Listener MAUs + ~2x in Four Years...

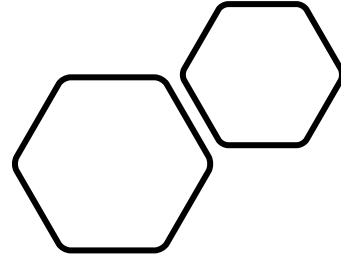
Podcast Listener MAUs, USA



Podcasts – Most Downloaded Apple Podcasts, 2018, USA

- 1) **The Daily** *The New York Times*
- 2) **The Joe Rogan Experience** Joe Rogan
- 3) **Stuff You Should Know** iHeartMedia
- 4) **Fresh Air** National Public Radio
- 5) **The Dave Ramsey Show** Dave Ramsey
- 6) **My Favorite Murder** Exactly Right
- 7) **TED Talks Daily** TED
- 8) **Up First** National Public Radio
- 9) **The Ben Shapiro Show** The Daily Wire
- 10) **Pod Save America** Crooked Media

Ad Tech



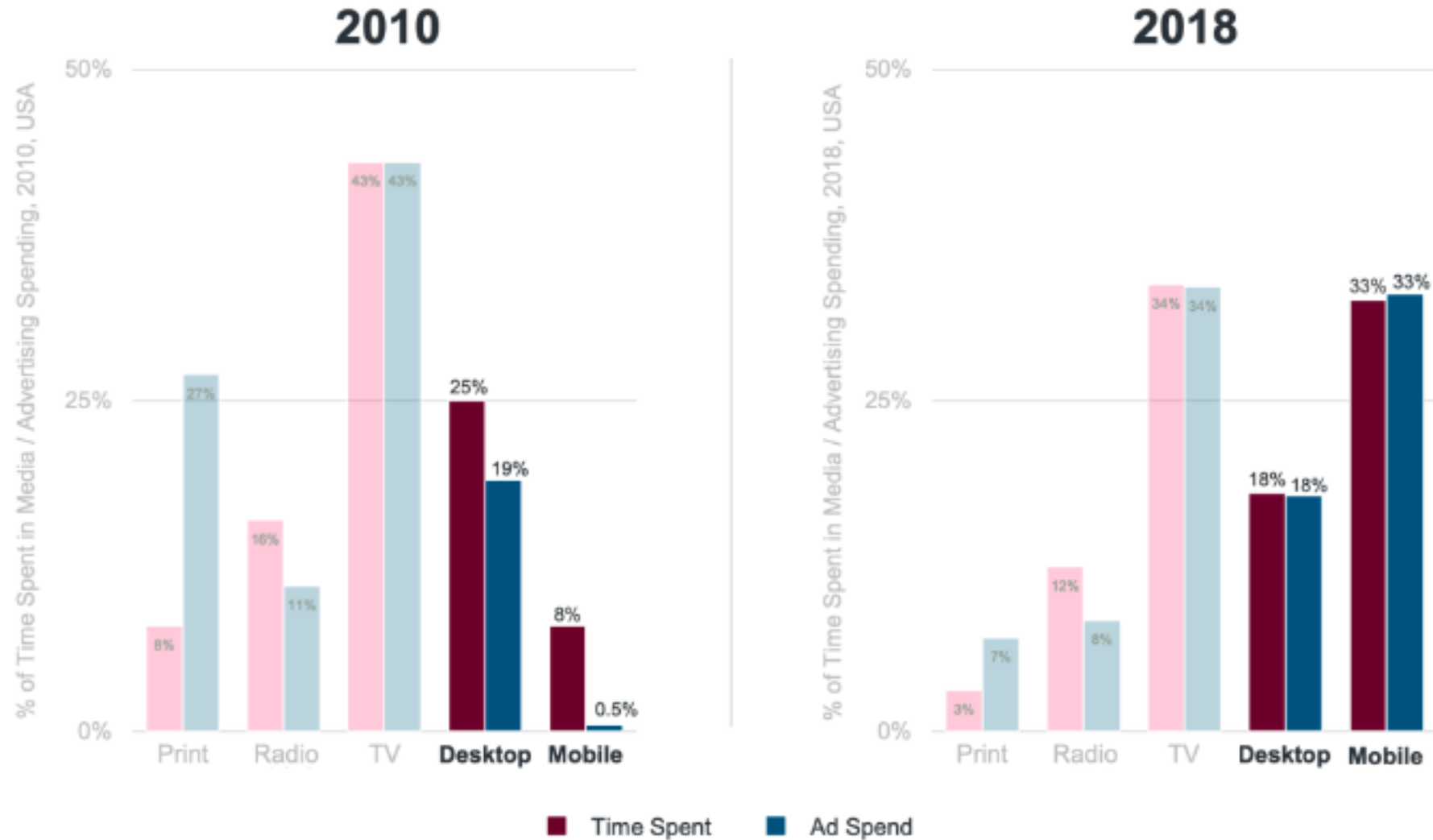
HOW DO WE INTERRUPT PEOPLE WITH OUR
ANNOYING AND IRRELEVANT ADVERTISING
IN A MORE **CUSTOMER-CENTRIC** WAY?



TOM
FISH
BURNE

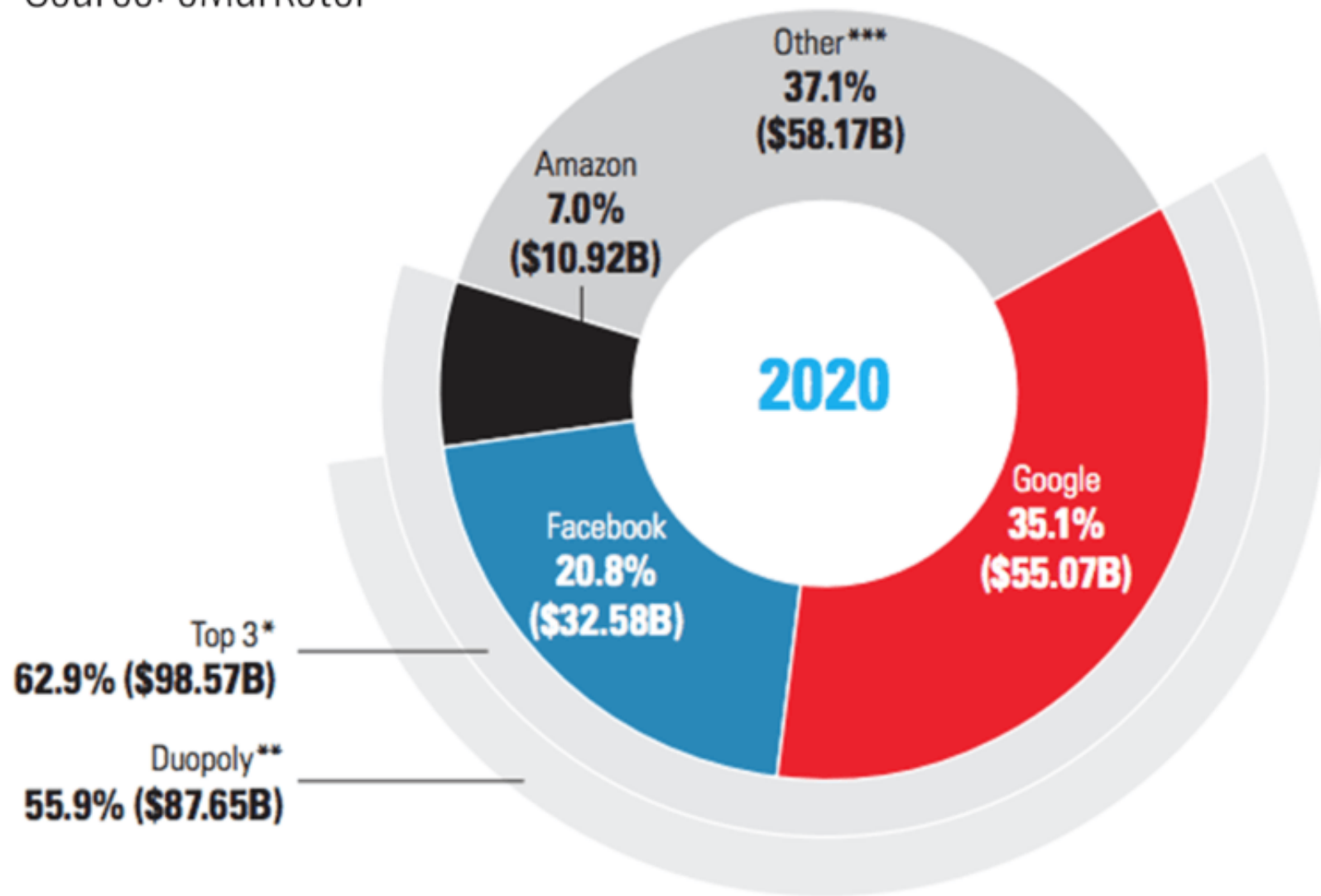
Media Time vs. Advertising Spending = Mobile @ Equilibrium (2018)...Desktop (2015)

% Time Spent in Media vs. % Advertising Spending



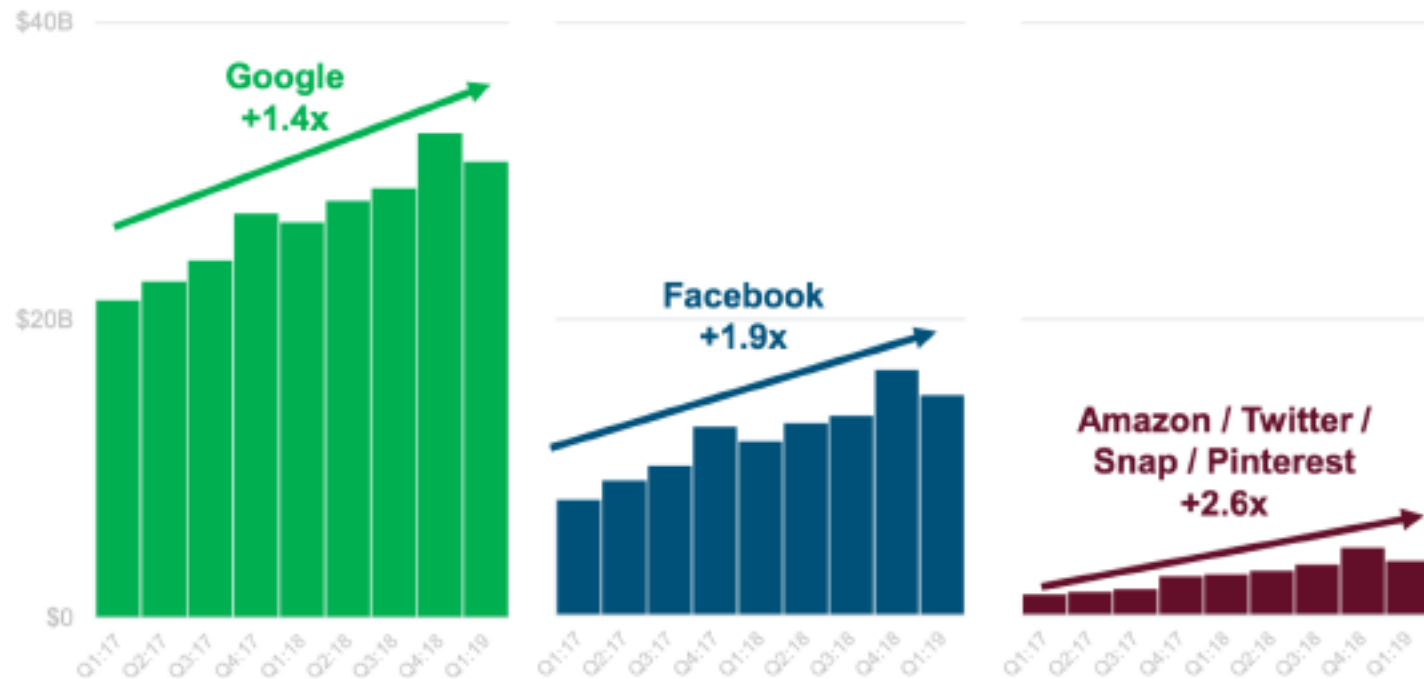
WHERE IS U.S. DIGITAL AD SPEND GOING?

Source: eMarketer



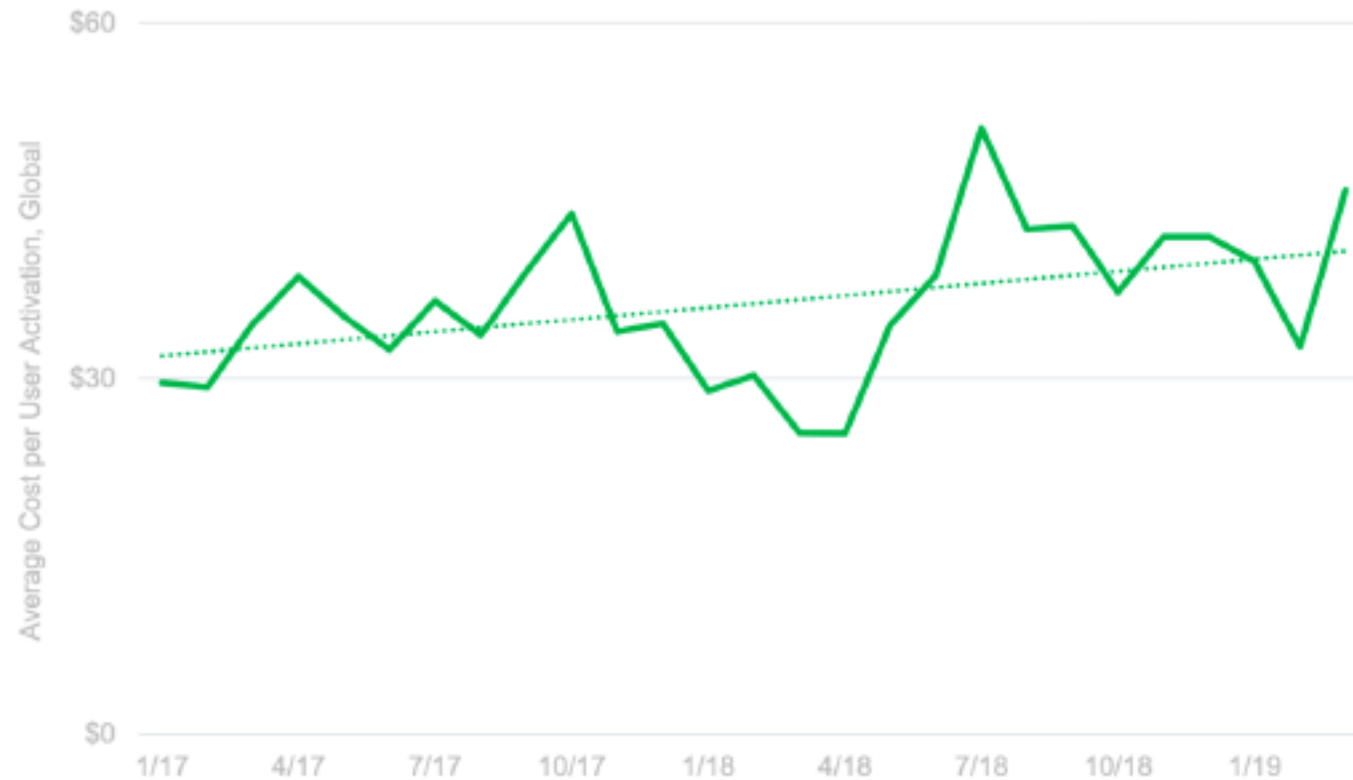
Internet Ad Platforms = Google + Facebook Lead But Others Gaining Share

Select USA-Based Advertising Platform Revenue, Global

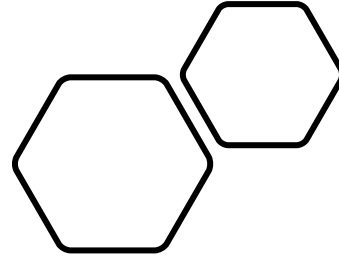


Customer Acquisition Cost (CAC) = Rising in Highly Competitive / Capitalized Sectors

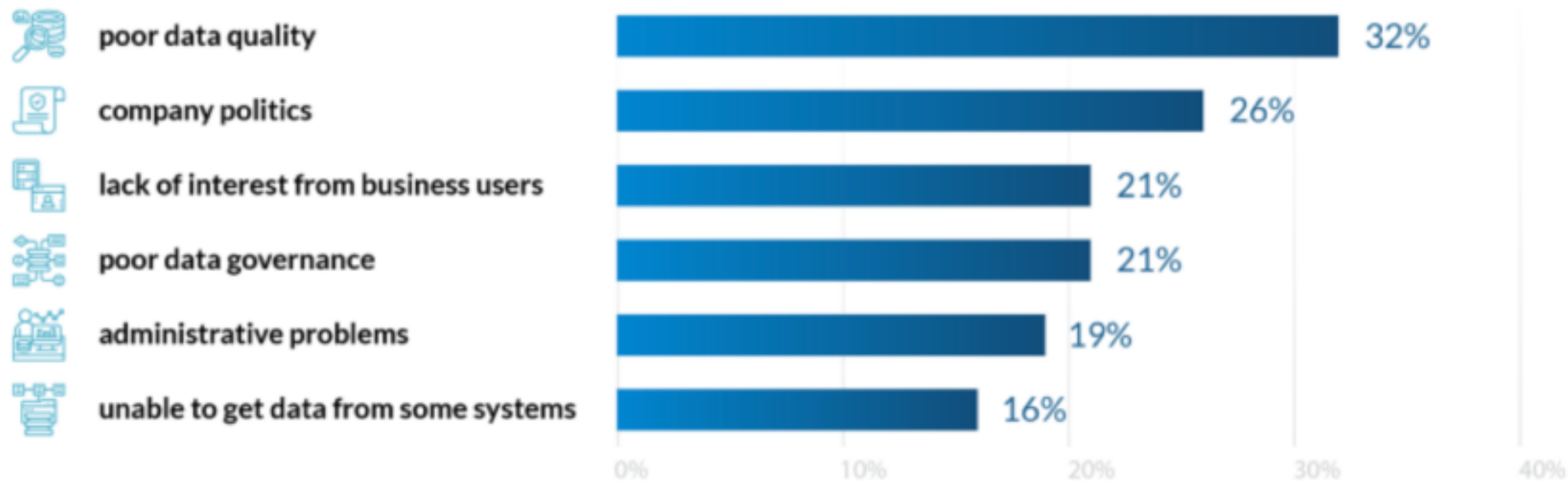
Cost Per User Activation – Mobile Finance Apps, Global per Liftoff



BI/AI

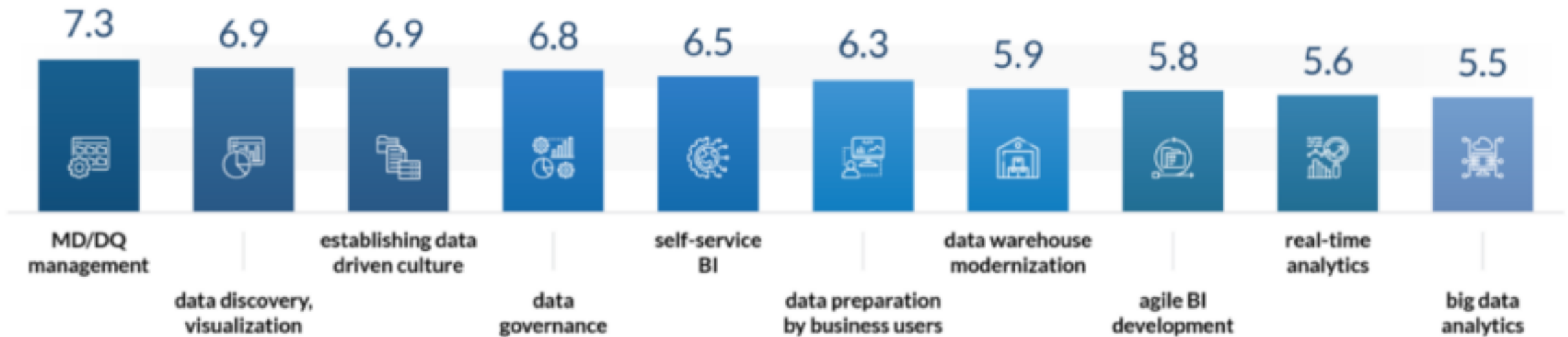


Most common business intelligence problems



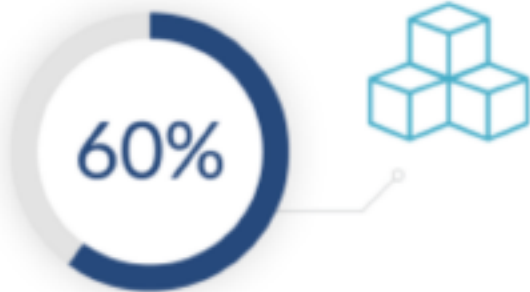
Activities where business intelligence will be crucial, score 1-10

Source: Datapine

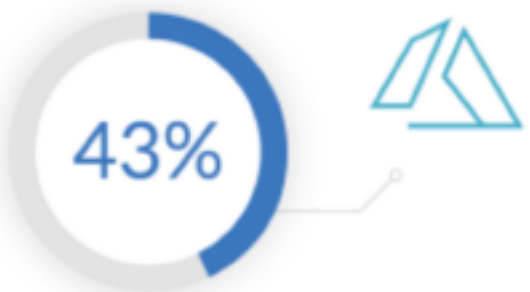


Leading cloud business intelligence providers

Source: Forbes



Amazon Web Services (AWS)



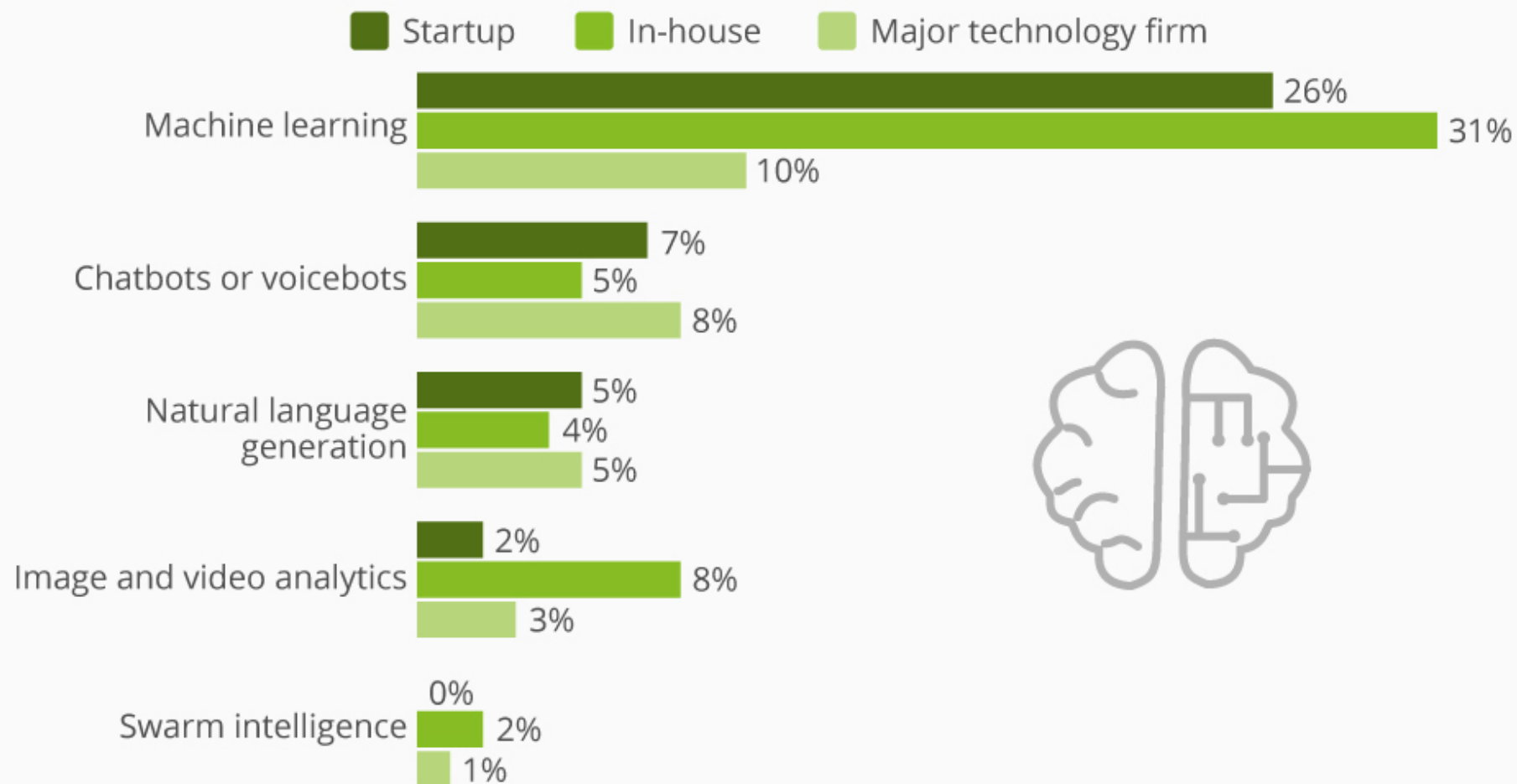
Microsoft Azure



Google Cloud

Machine Learning Dominates AI Use for Retailers

AI use case distribution in retail organizations worldwide in 2018, by operating model



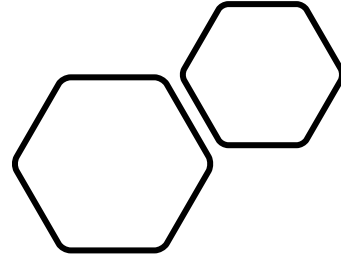
@StatistaCharts

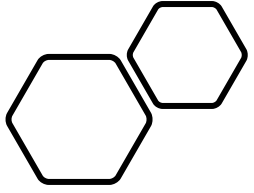
In October 2018, the top 250 retailers, determined by revenue, were surveyed across U.S., UK, France, Germany, Italy, Spain, Sweden, and the Netherlands for the study.

Source: Capgemini

statista

Big Data





Big Data



Data Use



Data Bias



Start Small,
Go Big

AR/VR/MR

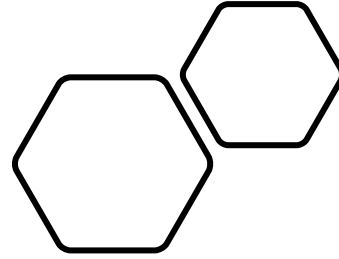


Image-Based Communication = Enabled by Computer Vision + Artificial Intelligence

Google Lens + AR Image Analysis / Communication Evolution

Visual Text Identification / Processing

2017

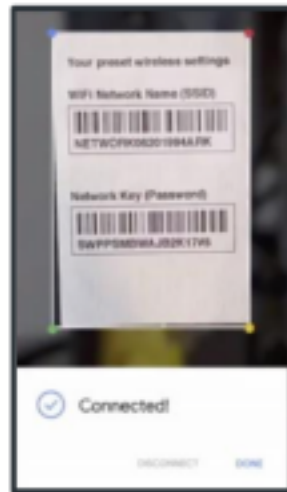
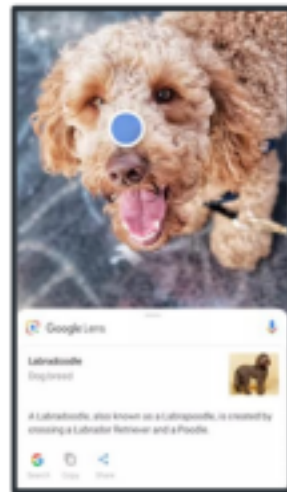


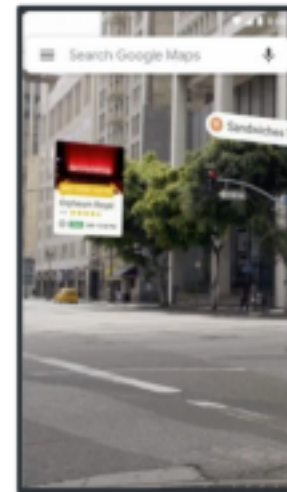
Image Identification / Context

2017



Contextual Augmented Reality

2018



Real-Time Visual Text Translation

2019



Edited Images = Growing Rapidly

Snap Lens Studio

User Generated / Custom Augmented Reality



Snap Community Lens Views



Innovation Models

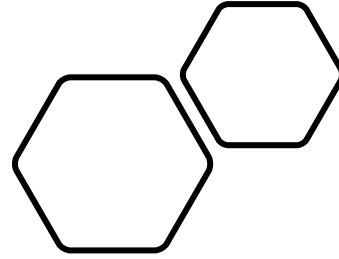


DNVB



Subscription

DNVB





zevo
flying insect trap



ADORAMA
VIDEO TAPES & CAMERA STORES



ALLUME



eVitamins

fabfitfun

FARFETCH

FIVE FOUR

Flipkart

FURNITURE ROW

GEEKFUEL

WHIPPING POST

Tommy John

Prosumer's Choice

BIRCHBOX

BLUEPORT

BLUTAG

HelloTech



HONEST



houzz

hubbc

TUFT & NEEDLE

TRUE

TOMBOYX

SPREZZABOX

BottleKeeper

breo

bugabo

Kamedis
Balance. Nature. Science.



KIDBOX

KitNipBox

KOPARI

Lakeland



SWOON
EDITIONS

Ritual

BUMKINS

CANDY CLUB

care/of

ideally

PABLETICS

PayNearMe

MikeMak

minted.

Modafino

MON PURS

naturebox

Rossi & Rei



CLEARISTA



Dia & Co

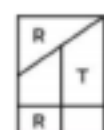


PACIFICCYCLE

Panjo

Plated.

Raise



Rossi & Rei

SNOWE

EARGO



ollie

evetane

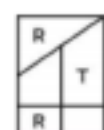
WALKER AND COMPANY



SHIPT



TechRabbit



trendbrew

truBRAIN

POSTMATES



AllTheRooms.

truBRAIN

VineOh!

WALKER AND COMPANY

Winc

wish



THINK

PRINTING

2MODERN

trendbrew

THINKCRUCIAL



ALOHA

ADORE ME

allbirds

ALLISON MITCHELL



ARDENE

Ashford

BANJO & MATILDA

SWYCH



tieks



BOXED

BELTOLOGY

BEVEL

Blue Apron

THE Bouqs CO.



brooklinen

BURROW

BOMBFELL

SeatGeek



STANCE



Casper

WARBY PARKER
eyewear DAVID K/ND

FOOD52

DOLLAR SHAVE CLUB



DSTLD



BULLETPROOF



STITCH FIX

craniologie

FATCO

FOOD52

hint

Paul & Evans



INDOCHINO

CAUSEBOX

Tortuga

THIRDLOVE



EVERLANE



JUSTEAB

PrimarTAFT

MeUndies

RADEN

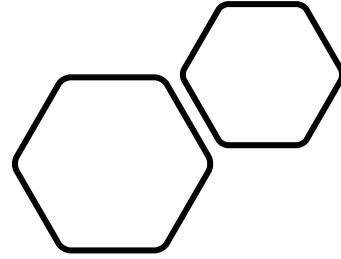
BOMBAS

iab³

DTC Sales as a % of NIKE Brand's Total Revenues



Subscription Economy





SUBSCRIPTION E-COMMERCE MARKET MAP

BEAUTY & COSMETICS



PERSONAL CARE



LEISURE



COFFEE & TEA



WOMEN'S APPAREL



MEN'S APPAREL



CHILD & BABY ITEMS



PET ITEMS



VITAMINS & SUPPLEMENTS



BEER & WINE



Subscription Economy

E-Commerce Subscriptions, %	Key Customer Value	Description	Example Brands
Replenishment	Saves time & money	Replenish the same or similar items	Hint water, any Amazon Subscribe, Dollar Shave club
Experience	Unique Experience	Subscription provides items to interact with	LootCrate, DateBox, Lets Make Art
Curation	Product Variety	Receive curated selection of items with varying levels of consumer decision making required	Most Wine Clubs, Fuego Box, Birchbox
Access	Exclusivity	Membership provides access and can convey additional VIP perks	Allocation Wine Clubs, NatureBox, Thrive Market

Happy Customers... Stitch Fix = Recommendations Drive Growth

Data-Driven / Personalized Recommendations...



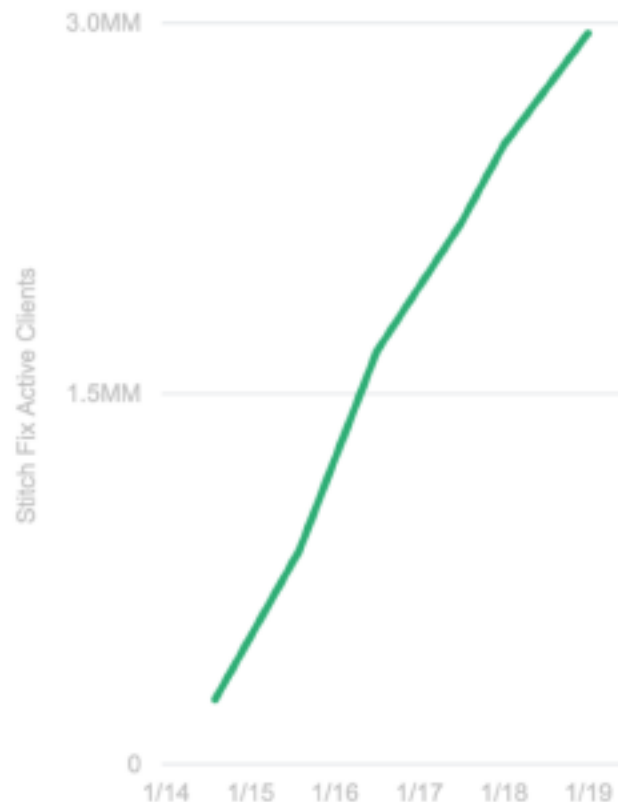
The better way to [sell clothing] is through personalization – get to know product, get to know people & generate really good recommendations...

What's really special about Stitch Fix is that 100% of what we sell is based on recommendations.

We have over 4,000 stylists...what makes them successful is listening, empathy & delivering what the client wants & doing that without judgment...Our business is about helping people feel their best, not necessarily selling the big high-end fashion trends.

Katrina Lake – Founder / CEO, Stitch Fix, 6/18

...Stitch Fix Active Clients



The Basic Business Model of the **Subscription Economy**

$$\text{ARR}_n - \text{Churn} + \text{ACV} = \text{ARR}_{n+1}$$

You start the period @ some recurring revenue run rate

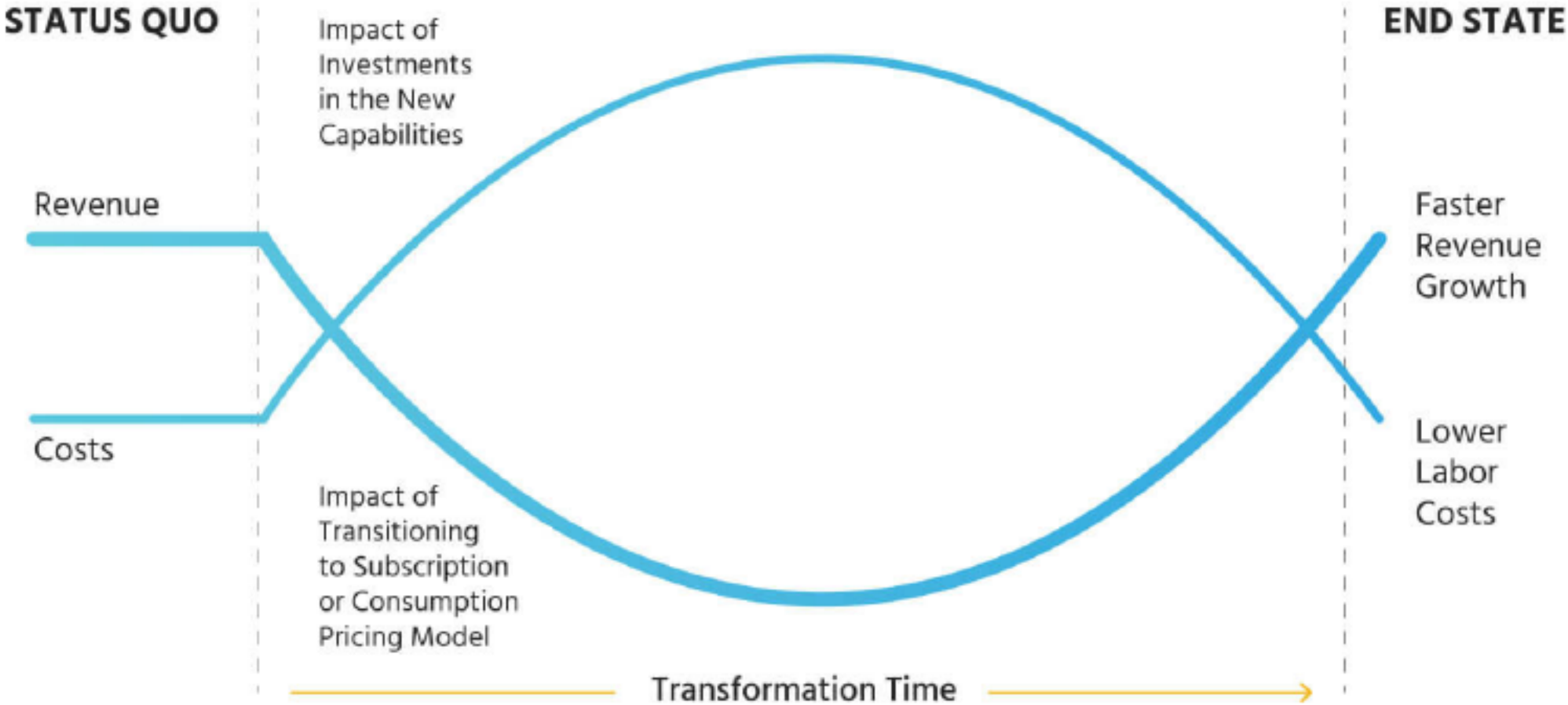
You spend some % of that ARR to service the base (COGS, G&A) and to reinvest in R&D

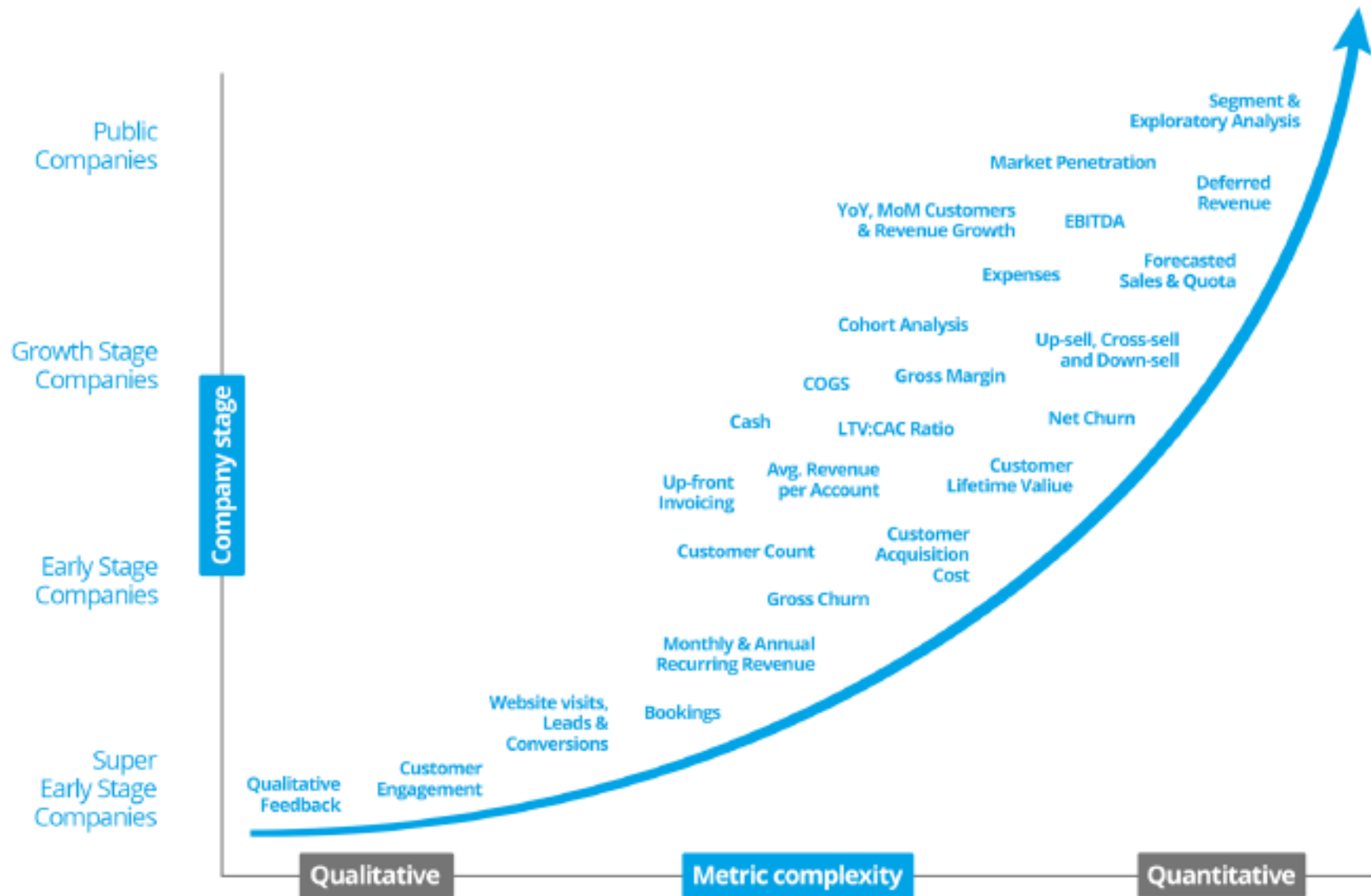
Hopefully you do a good job, and minimize the amount of that ARR that goes away

You invest to grow that ARR by acquiring new ACV (including both new customers and upsells)

You then end up at a new ARR level as you kick off the next period

The Fish Model

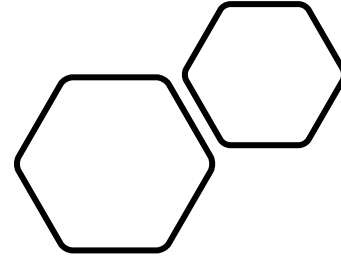




The **Subscription Economy** Income Statement would start with ARR vs Revenue

Annual Recurring Revenue	\$100	You start with an ARR level
Churn	(10)	You anticipate Churn
Net ARR	90	This gives you an expected income or cash flow to play with
COGS	(20)	
G&A	(10)	You spend to service the base
R&D	(20)	
Recurring Profit	40	This gives you your recurring profit margin

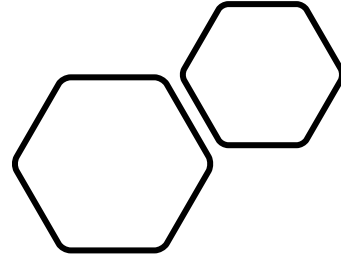
Green





The Environment & Sustainability

Let's Pick Wine + Tech



WE NEED TO DO SOMETHING
SO INNOVATIVE THAT NO
BRAND HAS EVER DONE
ANYTHING LIKE IT.



SEEMS RISKY. CAN YOU GIVE
EXAMPLES OF OTHER BRANDS
THAT HAVE DONE THIS?



TOM
FISH
BURNE



Companies miss out on billions in alcohol e-commerce sales – Rabobank

Posted By: Emma Upshall on: January 09, 2020 In: Alcohol, Business, Industries, Research, Retail

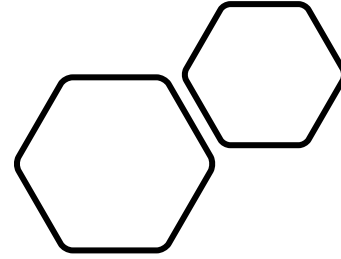
[Print](#) [Email](#)

PERCENT OF VOLUME & VALUE BY PRICE GROUP





Social Media



20

FEDERAL

RESERVE

NOTE

20

IL 40314425 E

L12

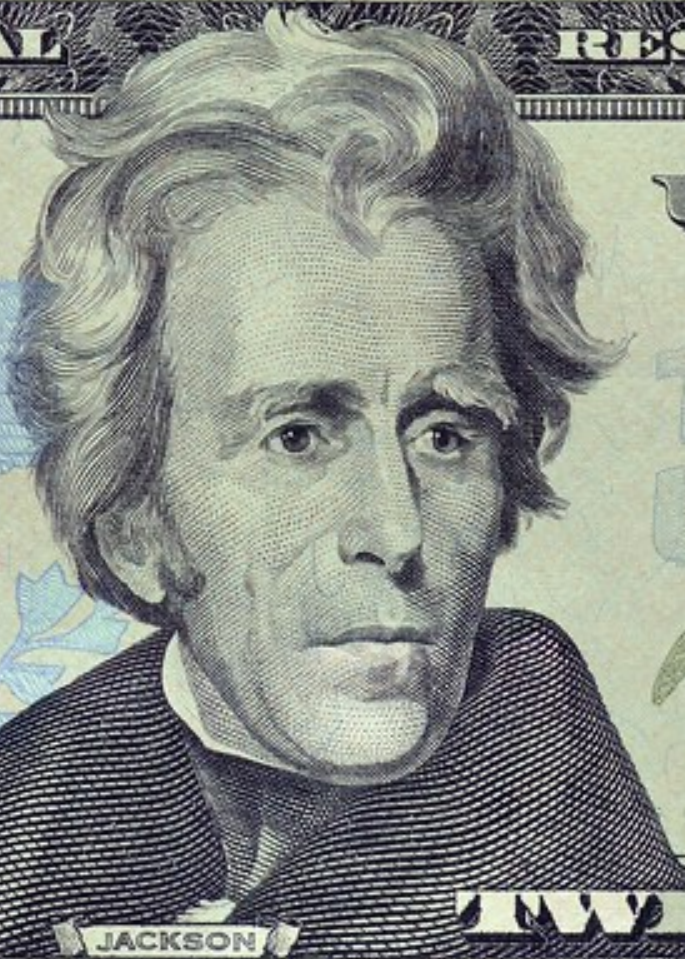


THIS NOTE IS LEGAL TENDER FOR ALL DEBTS, PUBLIC AND PRIVATE

Anna Escobedo Cabral

Treasurer of the United States.

B₂



JACKSON

B 399

THE UNITED STATES OF AMERICA

TWENTY DOLLARS USA

IL 40314425 E



Henry M. Paulson Jr.
Secretary of the Treasury.

20

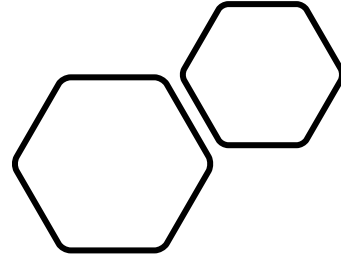
SERIES 2006

20

TWENTY DOLLARS



AI/BI



Select Brand
Ermetry Estates

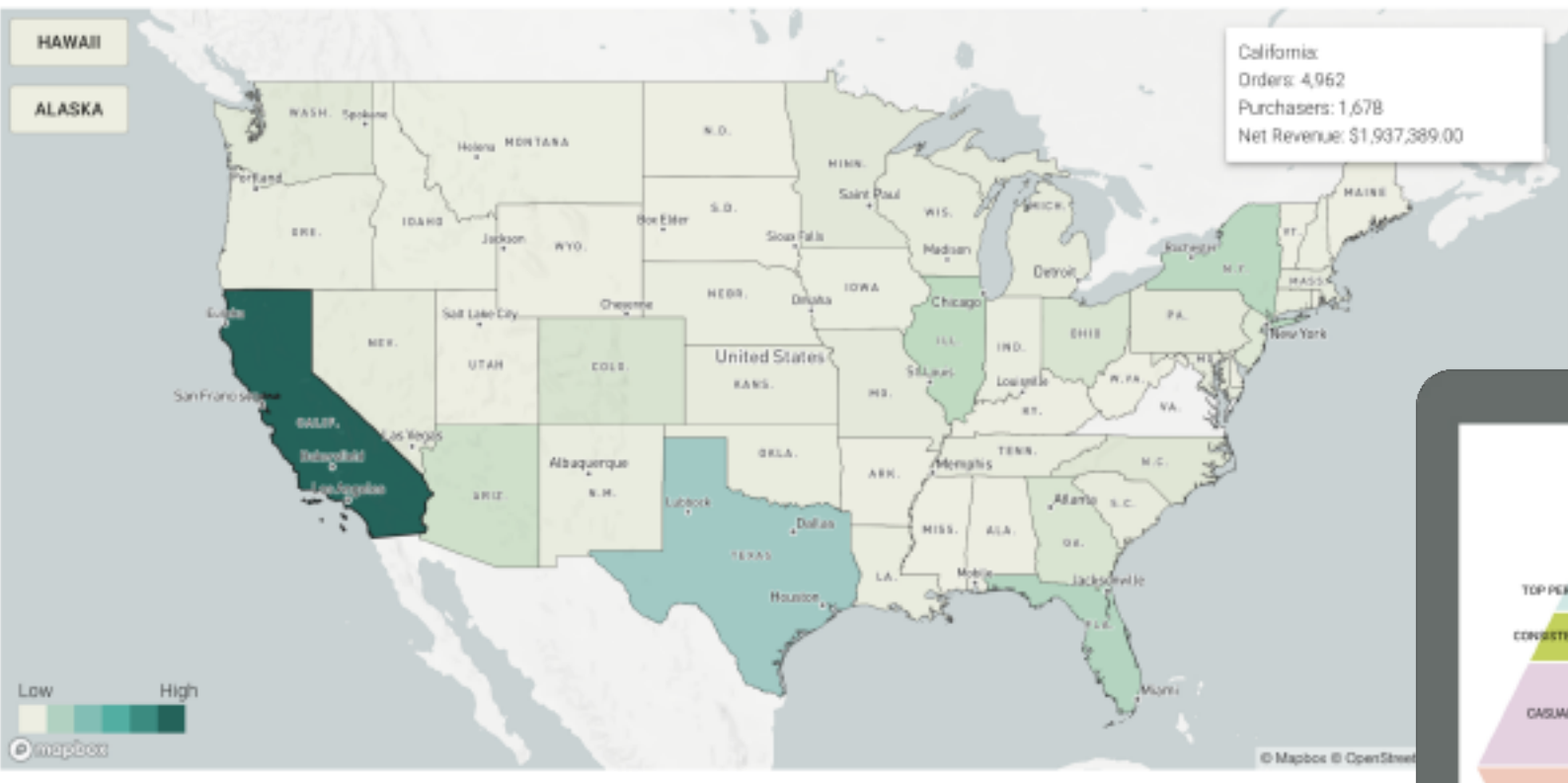
Customers

MORE FILTERS

DOWNLOAD CSV

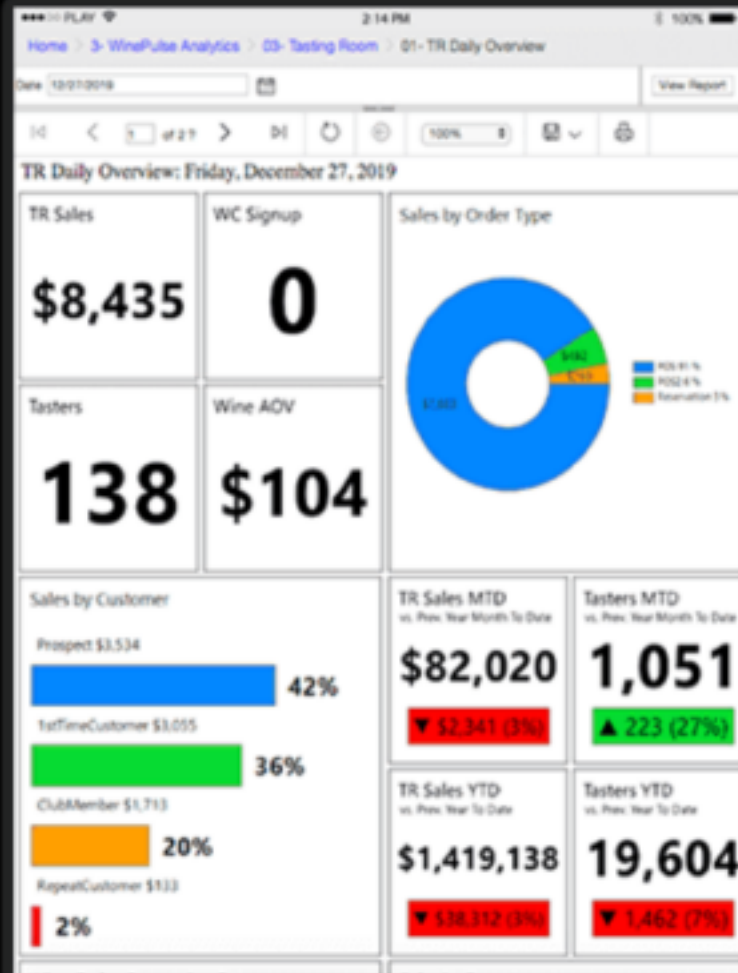
01-01-2019 to 12-19-2019 All Engagement

Select Multiple Regions

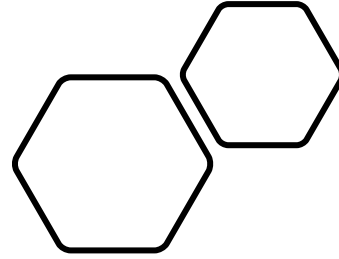




My Monthly Pulse Dec-19



AR/VR





DOWNLOAD



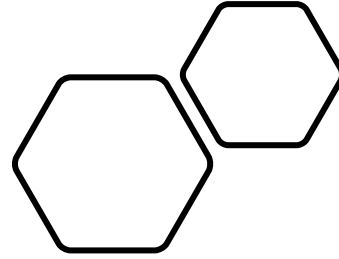
SCAN THE BOTTLE



DISCOVER



Stringing it All
Together



MarCom Tech



chiefmartec.com Marketing Technology Landscape ("Martech 5000")

May 2017



Sources: CabinetM, Capterra, G2 Crowd, Google, LUMA Partners, Siftary, TrustRadius — see <http://chiefmartec.com/2017/05/marketing-technology-landscape-supergraphic-2017/> for details.

Produced by Scott Brinker (@chiefmartec) and Anand Thaker (@anandthaker).



2011



~150

2012



~350

2014



~1,000

2015



~2,000

2016



~3,500

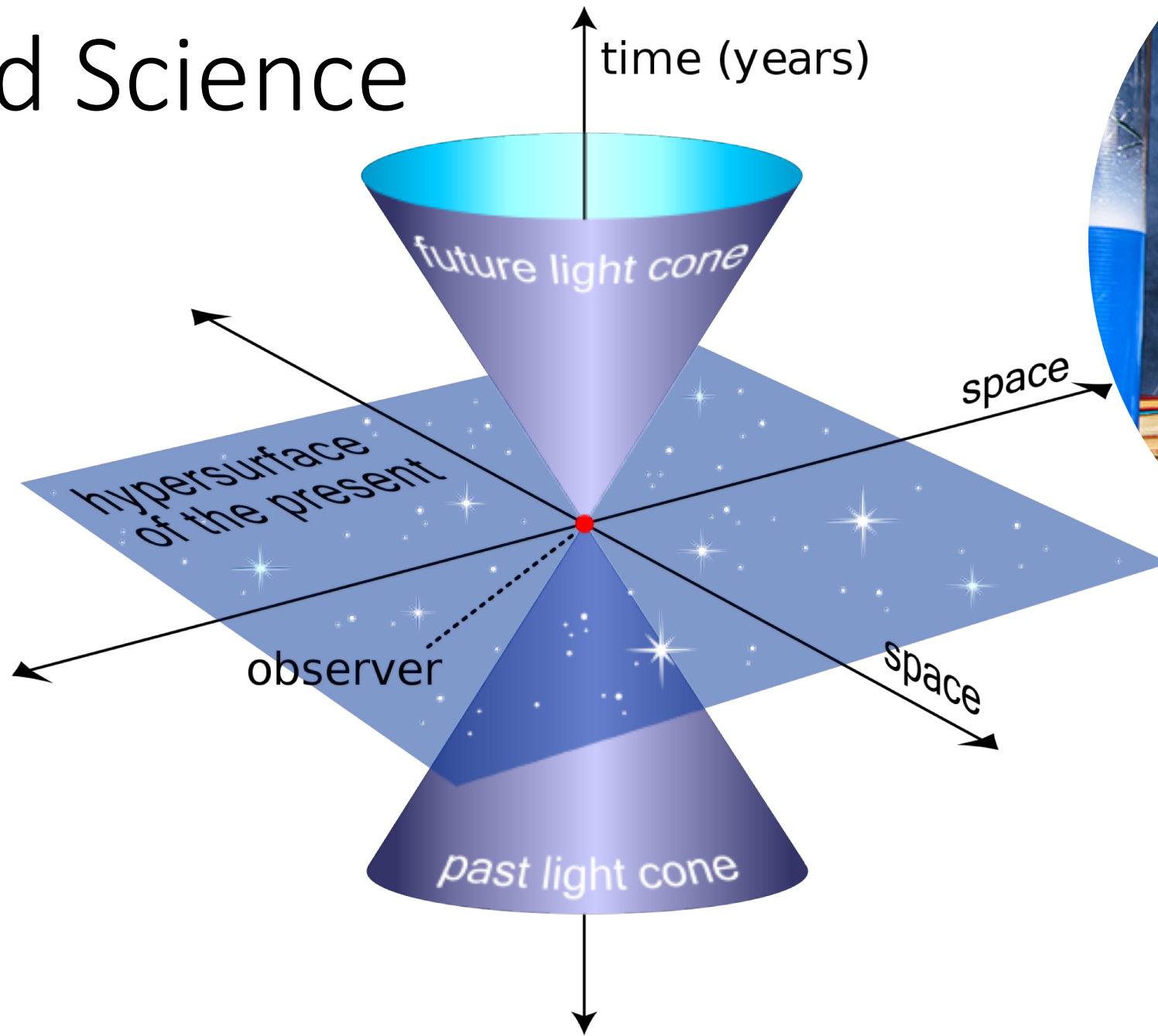
2017



~5,000

Growth of the marketing technology landscape over 7 years

Mad Science



Surviving Digital



THE SIX STAGES OF DIGITAL TRANSFORMATION



BUSINESS AS USUAL:

Organizations operate with a familiar legacy perspective of customers, processes, metrics, business models, and technology, believing that it remains the solution to digital relevance.



PRESENT AND ACTIVE:

Pockets of experimentation are driving digital literacy and creativity, albeit disparately, throughout the organization while aiming to improve and amplify specific touchpoints and processes.



FORMALIZED:

Experimentation becomes intentional while executing at more promising and capable levels. Initiatives become bolder and, as a result, change agents seek executive support for new resources and technology.



STRATEGIC:

Individual groups recognize the strength in collaboration as their research, work, and shared insights contribute to new strategic roadmaps that plan for digital transformation ownership, efforts, and investments.



CONVERGED:

A dedicated digital transformation team forms to guide strategy and operations based on business and customer-centric goals. The new infrastructure of the organization takes shape as roles, expertise, models, processes, and systems to support transformation are solidified.

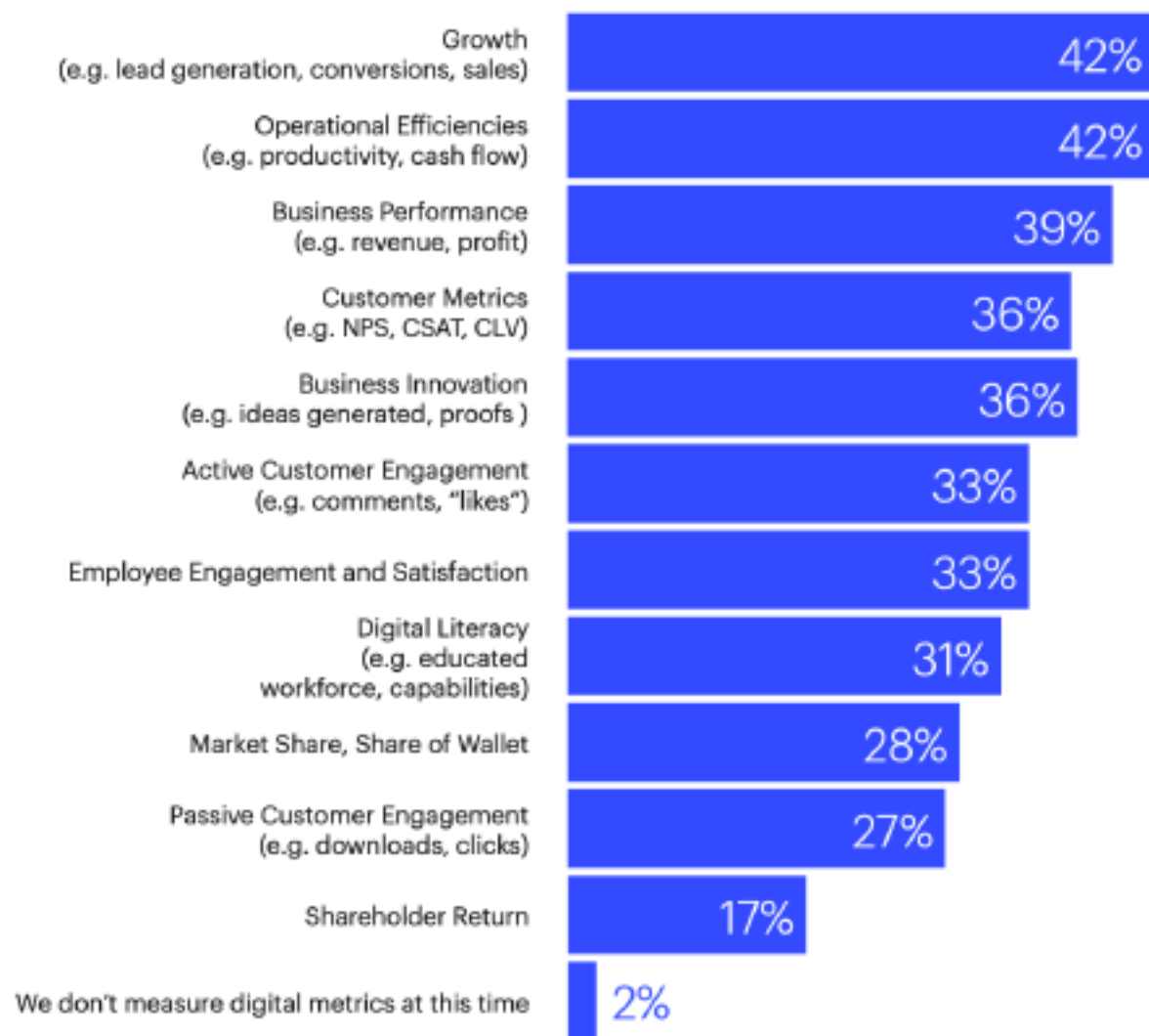


INNOVATIVE AND ADAPTIVE:

Digital transformation becomes a way of business as executives and strategists recognize that change is constant. A new ecosystem is established to identify and act upon technology and market trends in pilot and, eventually, at scale.

FIG 13: DIGITAL TRANSFORMATION METRICS

Q: What metrics does your organization actually measure today related to digital transformation?



Sex Panther. Because Romance is the only sport that requires two balls.



What is Sex Panther?

Sex Panther is a cologne. It is a manly cologne. So don't even try wearing it if you're not manly, because it will melt your face off like ladies' undergarments in a 1977 Trans-Am Special Edition.



How do I put it on?

Most people unscrew the cap, apply it by the handful to any exposed skin areas, and pour a generous amount down the front of the pants.

It would be unwise to drink it directly out of the bottle. No human being could withstand that. Seriously, even Kitty Dukakis.

WARNING: For your own safety, do not stand too close to the ladies while enjoying the fine aroma of Sex Panther Cologne.



How does it work?

Imagine wearing a midnight-black t-shirt with a wolf airbrushed on the front and a great white shark arm-wrestling a sherman tank on the back. Now imagine wearing a three-piece suit made out of those shirts. It's like that, but in cologne form.



What else do I need to know?

Two words: Moustaches.

NOTE: Sex Panther may or may not contain any of the following ingredients:



SEX PANTHER

60%
OF THE TIME
IT WORKS **EVERY TIME.**

Sex Panther. Scientifically engineered using space-age petroleum byproducts and animal parts. So you know it's good.

Quantitatively, it is possible to calculate the level of awesomeness contained within a single bottle of Sex Panther cologne using the equation:

$$\text{Panther} = .6 \left(\frac{Q + W + W^1}{\Delta U} \right)$$

From this, we can construct the appropriate dataset in order to plot the chart on the right (Fig. 1), which clearly shows that Sex Panther is over 150% more awesome than anything else ever sold in the history of the entire world, even that cologne that they sold in the 1930s that was made with the pulverized skull of Hernan Cortes.

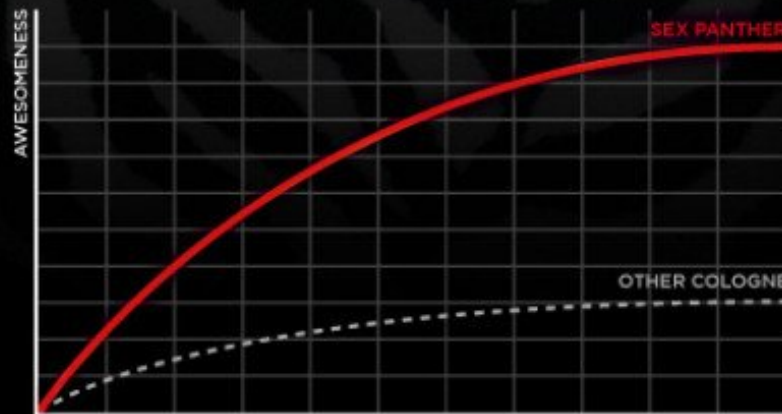


Fig. 1



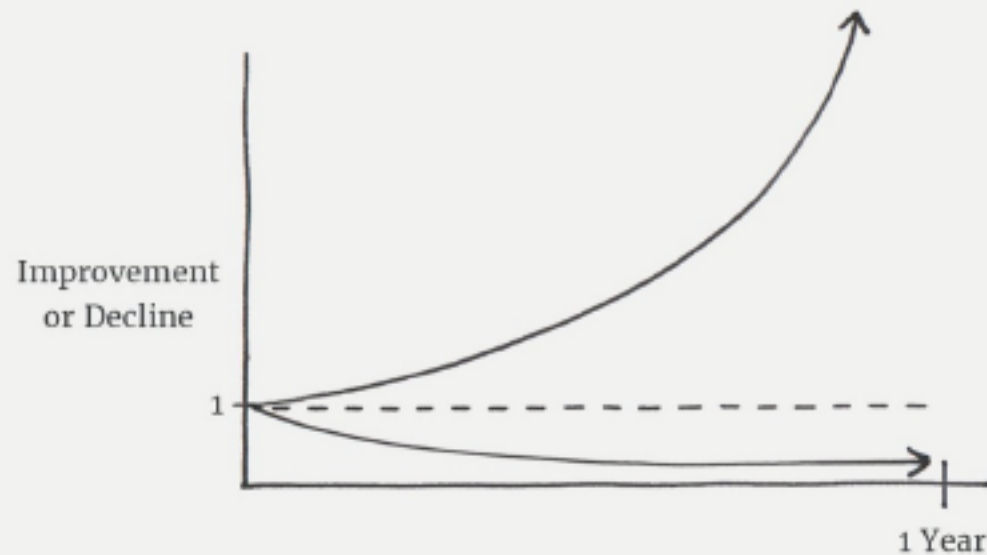
Seussian Implementation



The Power of Tiny Gains

1% better every day $1.01^{365} = 37.78$

1% worse every day $0.99^{365} = 0.03$



“You have brains in
your head. You have
feet in your shoes.
You can steer
yourself any direction
you choose.
- Dr. Seuss

People, Ideas, Machines

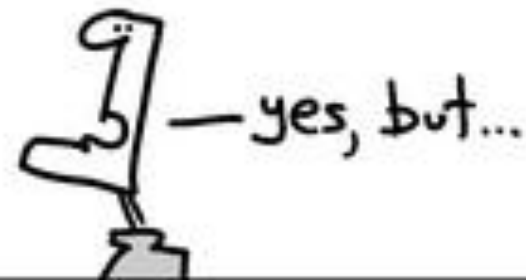
<http://www.the-buyer.net/insight/one-step-beyond-2020-joe-fattorini-on-people-ideas-machines-in-that-order/>



Without the Top, You'd Better Stop

"A **person's** a
person **NO**
matter how
SMALL!
-Dr. Seuss

GREAT IDEAS ALTER THE
POWER BALANCE IN RELATIONSHIPS.
THAT'S WHY GREAT IDEAS ARE
INITIALLY RESISTED.

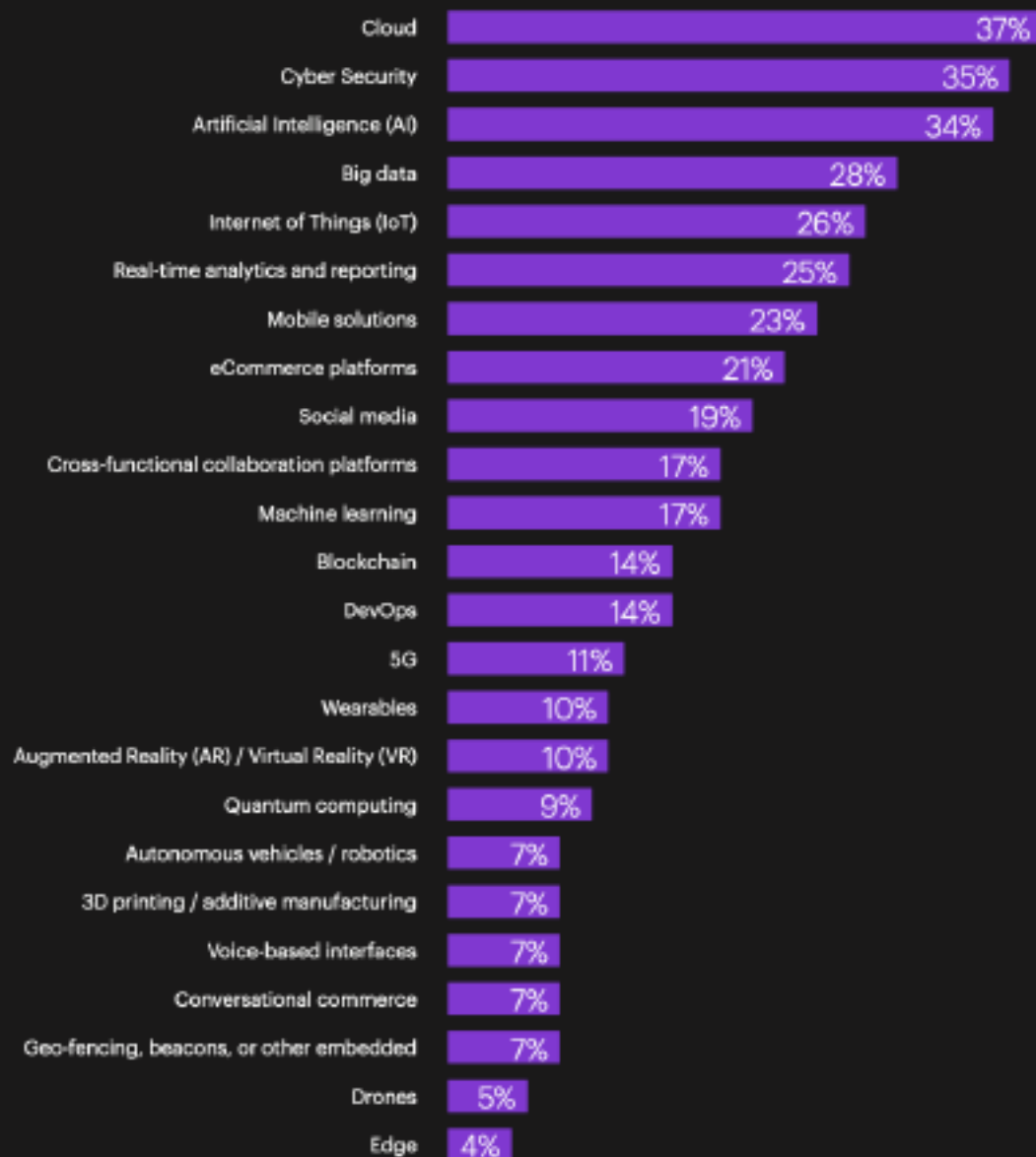


@hgh

Goals

FIG 12: TOP-PRIORITY TECHNOLOGY INVESTMENTS IN 2019

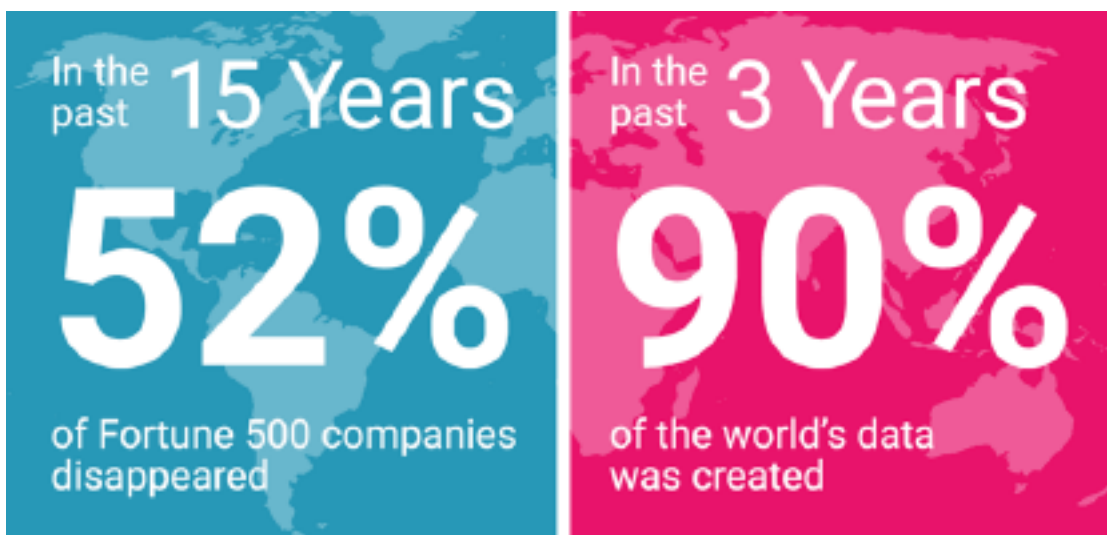
Q: What are your top priorities for technology investments in 2019?



Source: Altimeter Digital Transformation Survey, Q3 2018; Base: N=554

Paying it Forward

Cost Center or Investment Center



The 10 Most Valuable Companies on the Fortune 500

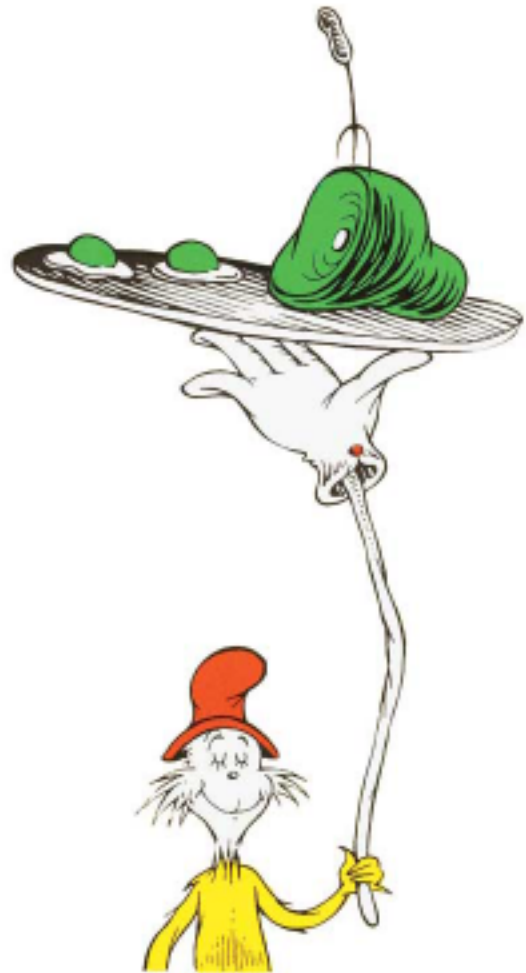
While Walmart is king on the Fortune 500, which ranks by revenue, investors see more promise in tech firms—bestowing Silicon Valley with some of the highest market values out there.

Value Rank ▼	Company	Market Value	Sector	Revenues (Bil)	F500 Rank
1	Apple	\$921 bil.	Technology	\$229 bil.	4
2	Amazon.com	\$765 bil.	Retailing	\$178 bil.	8
3	Alphabet	\$750 bil.	Technology	\$111 bil.	22
4	Microsoft	\$746 bil.	Technology	\$90 bil.	30
5	Facebook	\$531 bil.	Technology	\$41 bil.	76
6	Berkshire Hathaway	\$492 bil.	Financials	\$242 bil.	3
7	JPMorgan Chase & Co.	\$388 bil.	Financials	\$114 bil.	20
8	Exxon Mobil	\$349 bil.	Energy	\$244 bil.	2
9	Johnson & Johnson	\$332 bil.	Health Care	\$77 bil.	37
10	Bank of America Corp.	\$315 bil.	Financials	\$100 bil.	24

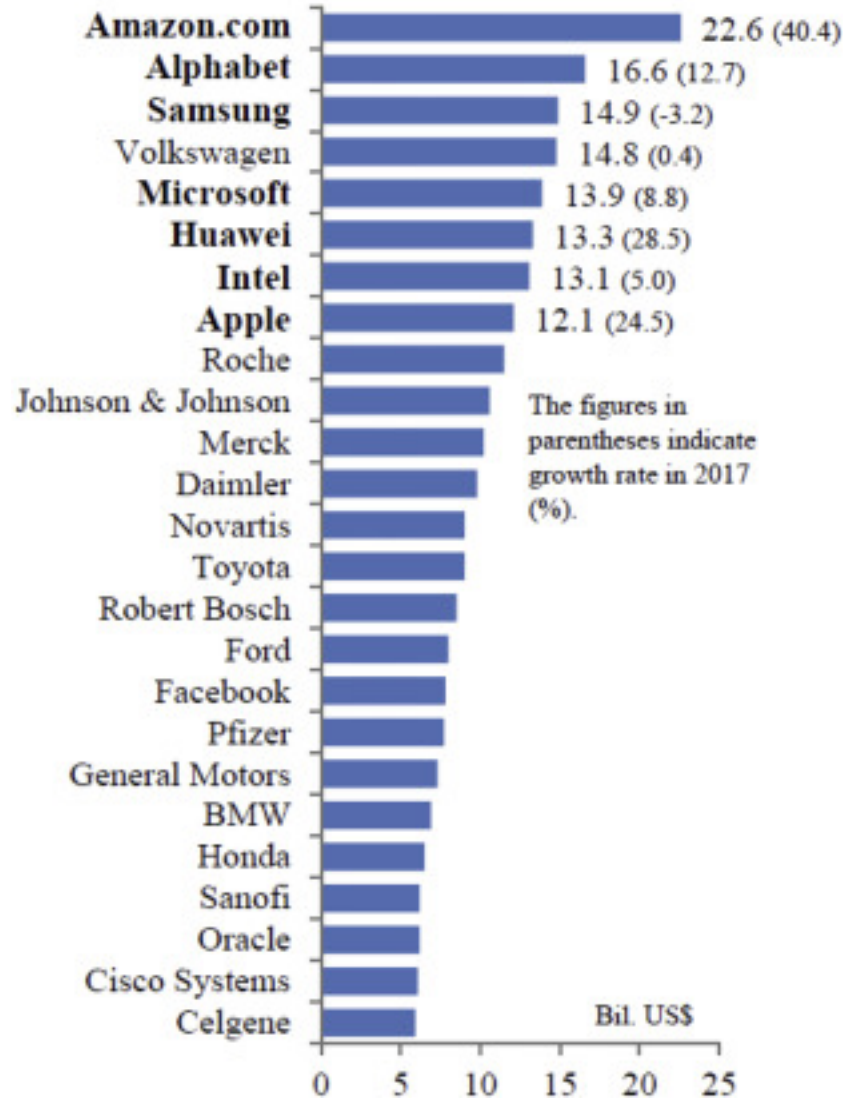
As of 5/21/2018

SOURCE: [Fortune 500](#)

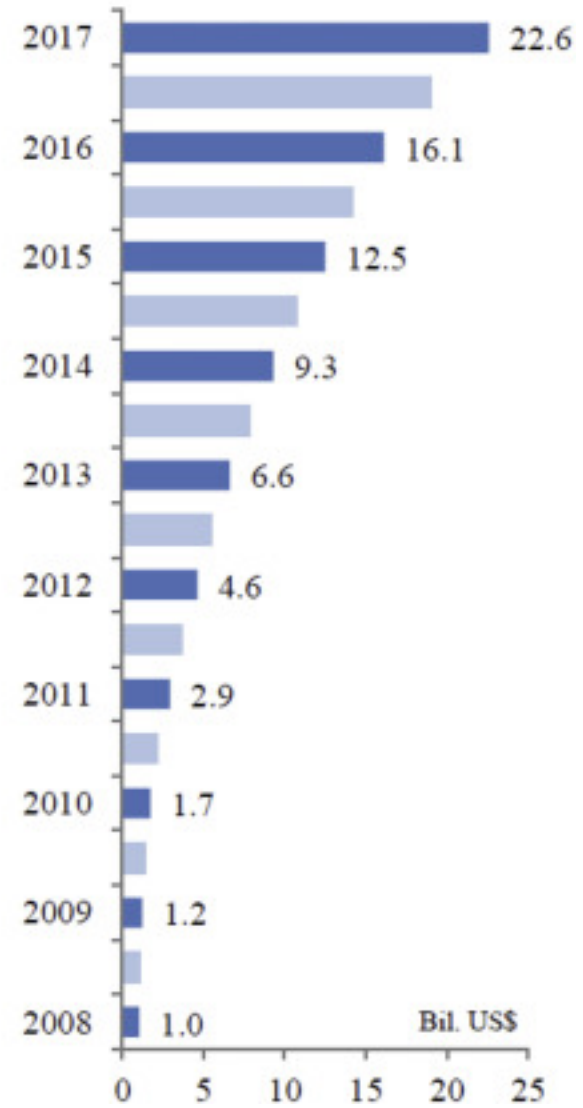
FORTUNE



World top 25 R&D leaders in 2017



Amazon (Mid-year and year end: 2008-2017)



Less Voices for Better Choices

WE'VE GOT
TO MAKE NOISES IN
GREATER AMOUNTS!
*So, open your
mouth, lad!*

FOR EVERY VOICE COUNTS!
-Dr. Seuss



Start Small, Aim Big (cone planning)

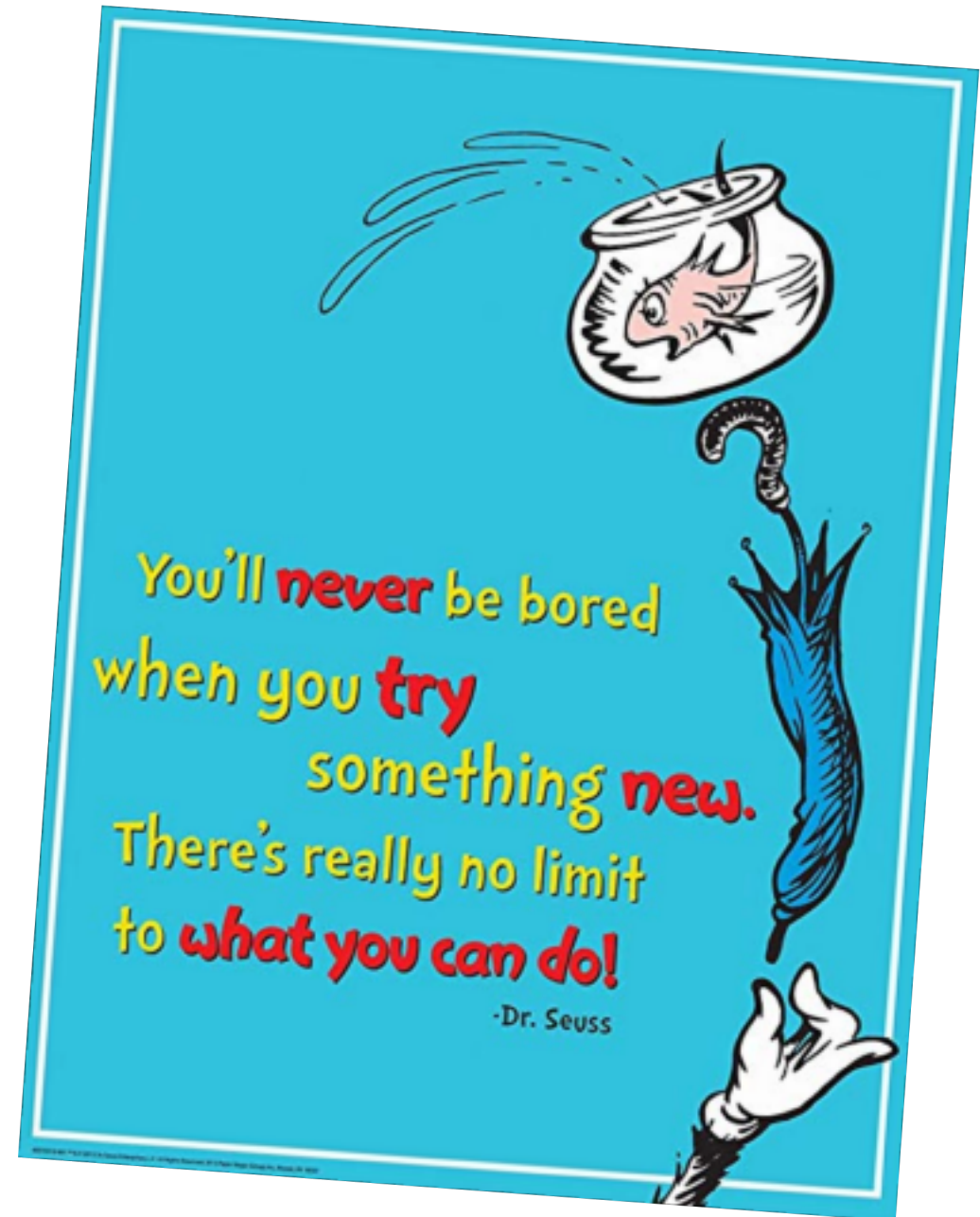
A Futurist's Framework for Strategic Planning

Instead of arbitrarily assigning goals on a quarterly or yearly time line, use a cone instead. First identify highly probable events for which there's already data or evidence, and then work outward. Each section of the cone is a strategic approach, and it encompasses the one before it until you reach major systems-level evolution at your company.



Source: Amy Webb, Future Today Institute

HBR

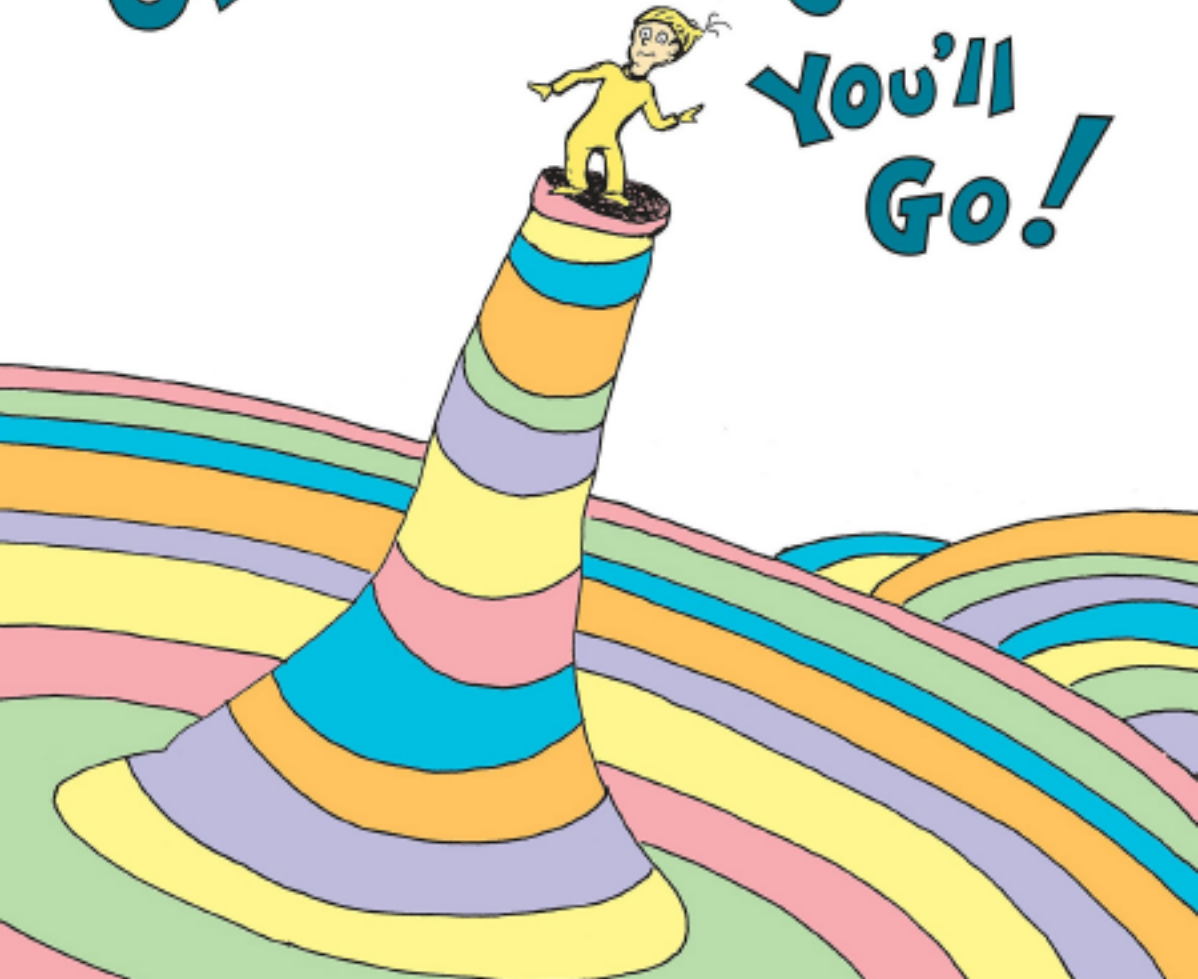


Don't Catch the Lure



Fail Forward

Oh, the Places
You'll
Go!



Oh the things
you can find
if you don't
stay behind.

– Dr. Seuss



Sunlight is the Best . . .



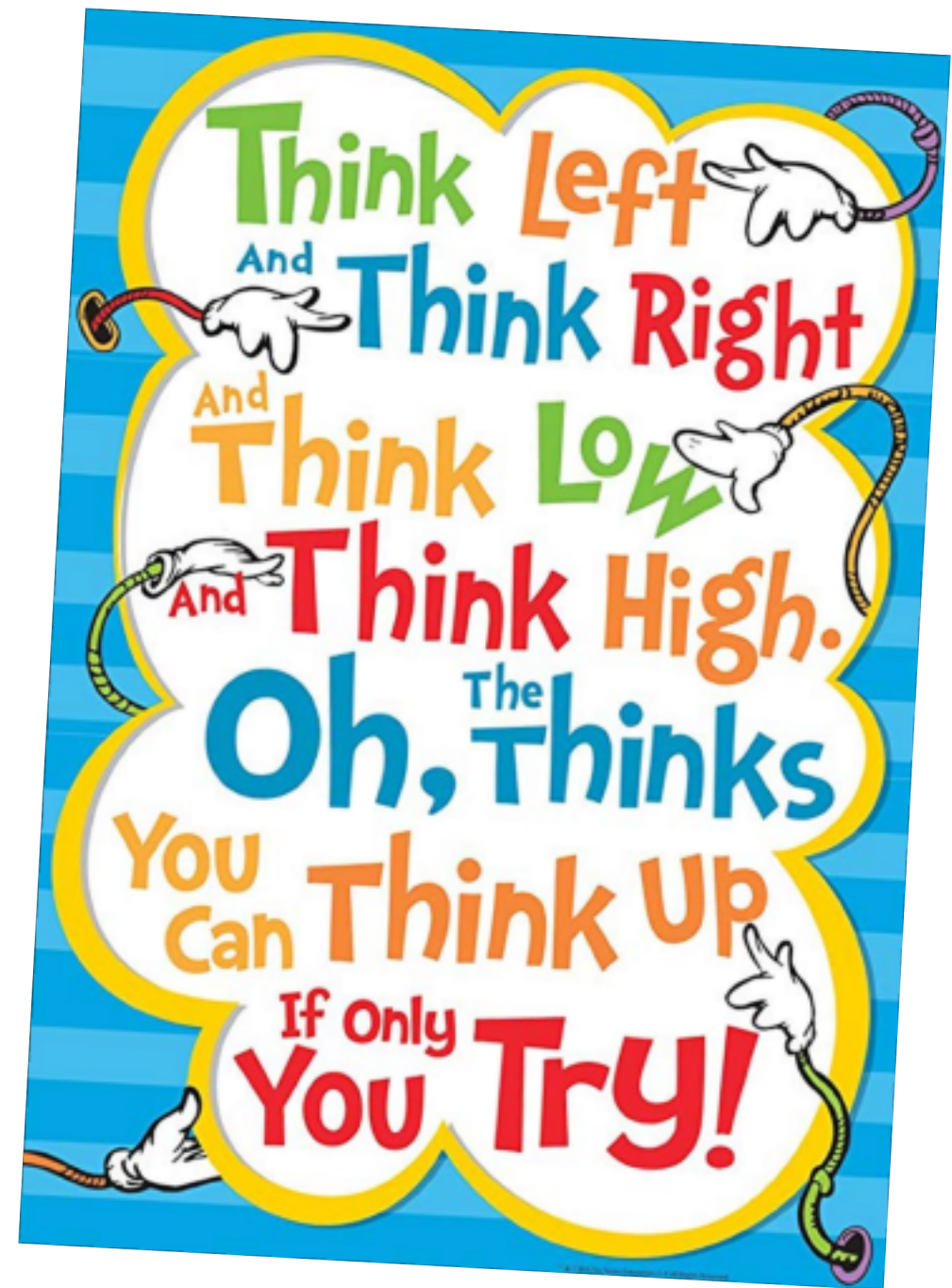
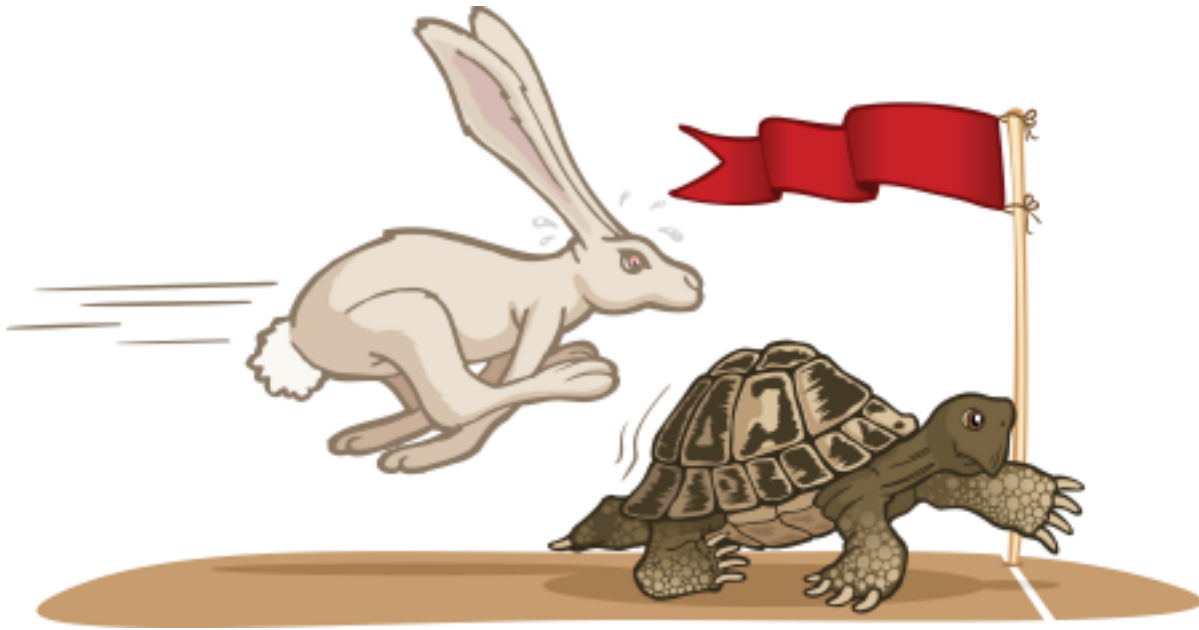
**"Sunlight is the
best disinfectant."**

-LOUIS BRANDEIS

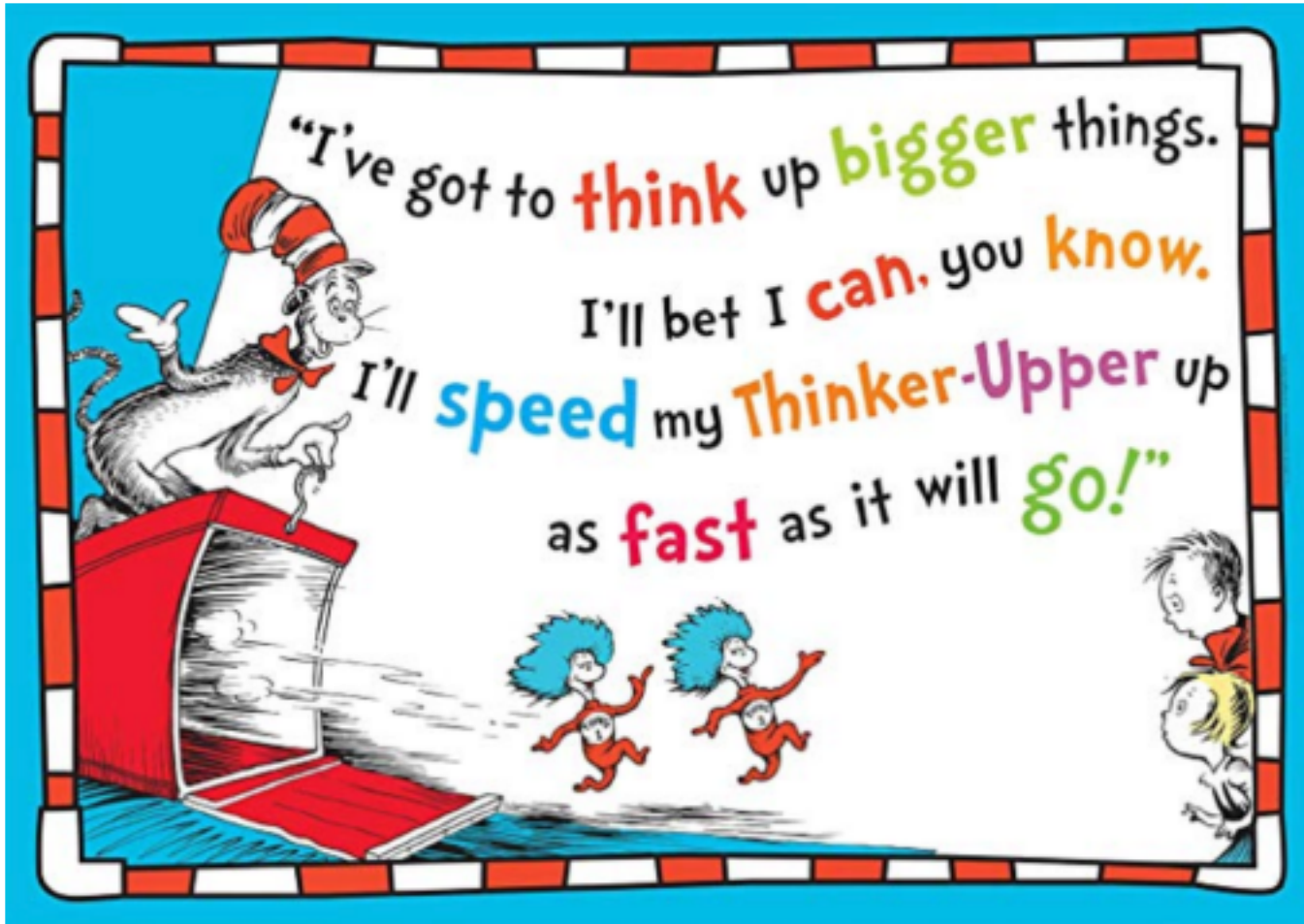
The MORE
that you read,
the MORE things
you will know.
The MORE that you
Learn,
the MORE places you'll go.



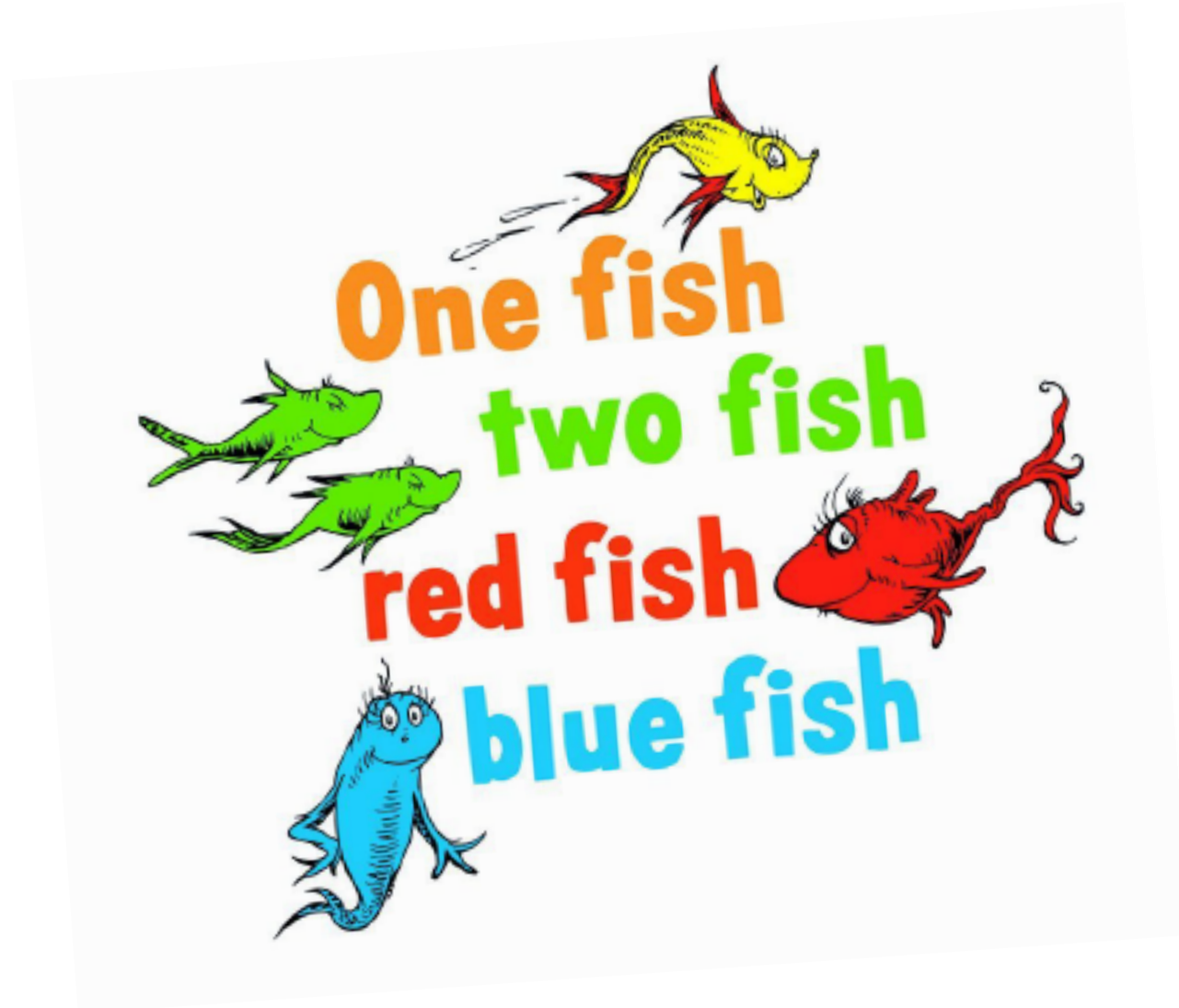
**Slow Down
to go Faster**



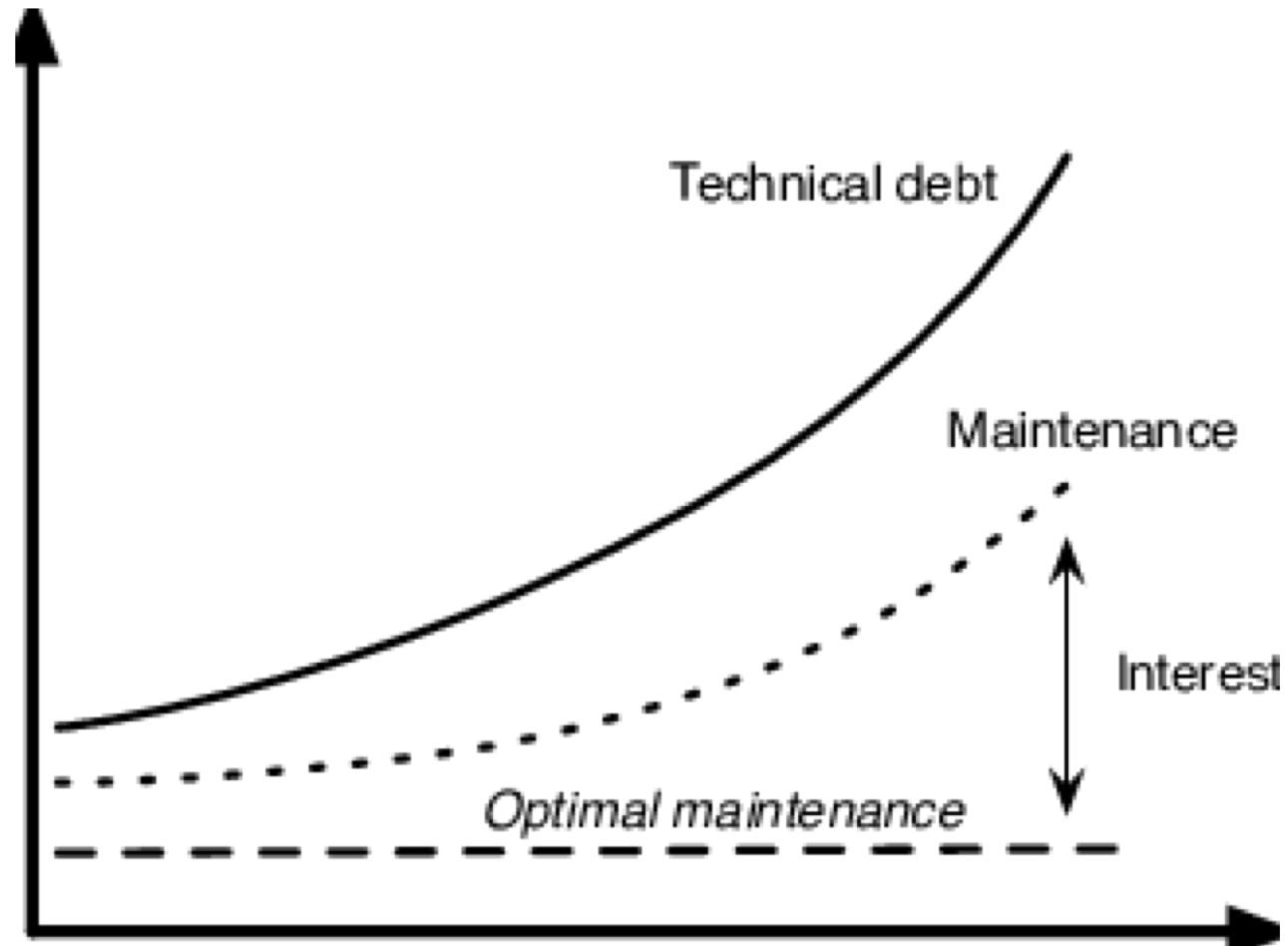
Nail it before you Scale it



Usage is Oxygen



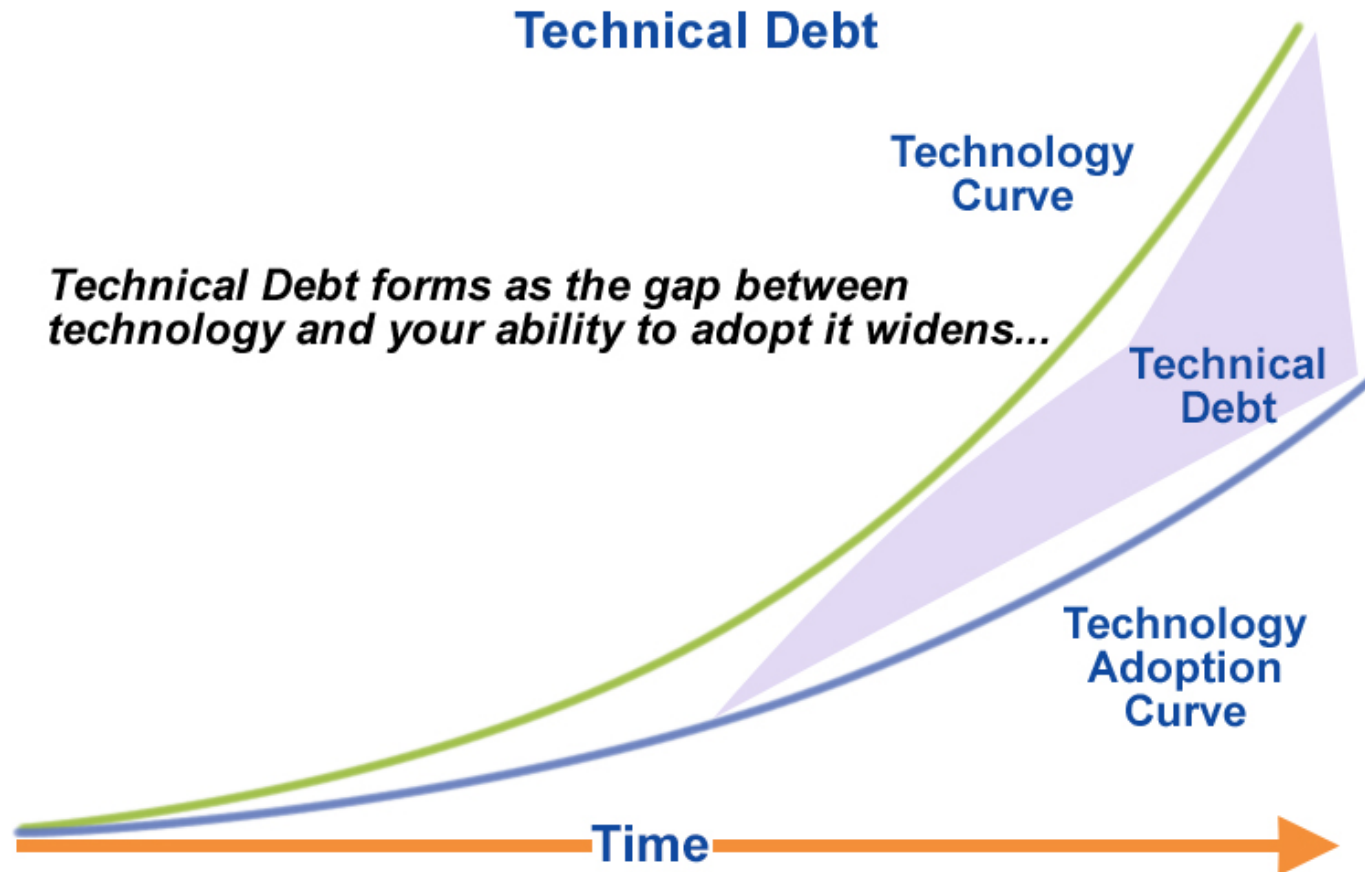
Budget for Technical Debt

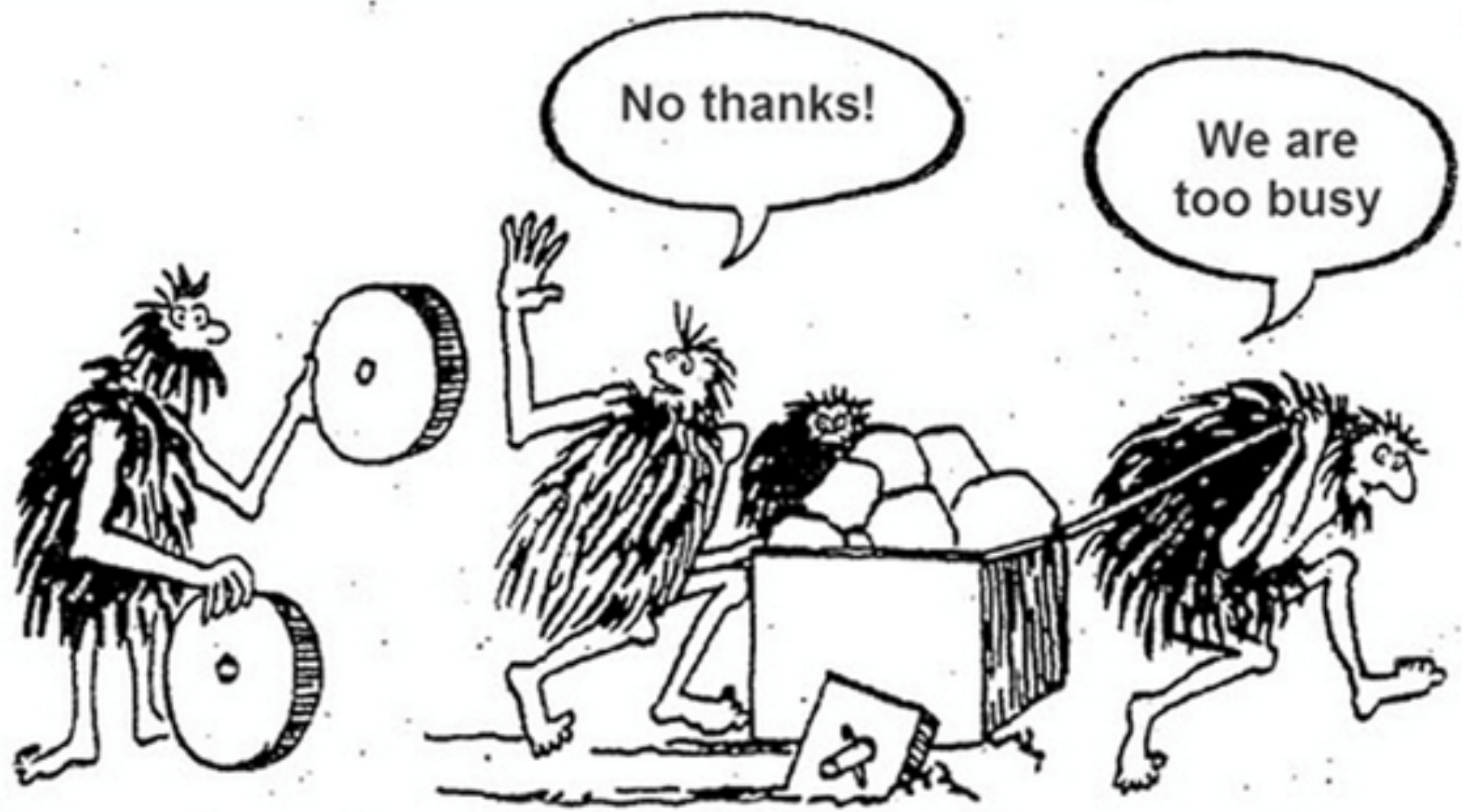






Technical Debt Is Multidimensional





No thanks!

We are too busy

"The most exciting breakthroughs of the twenty-first century will not occur because of technology, but because of an expanding concept of what it means to be human."

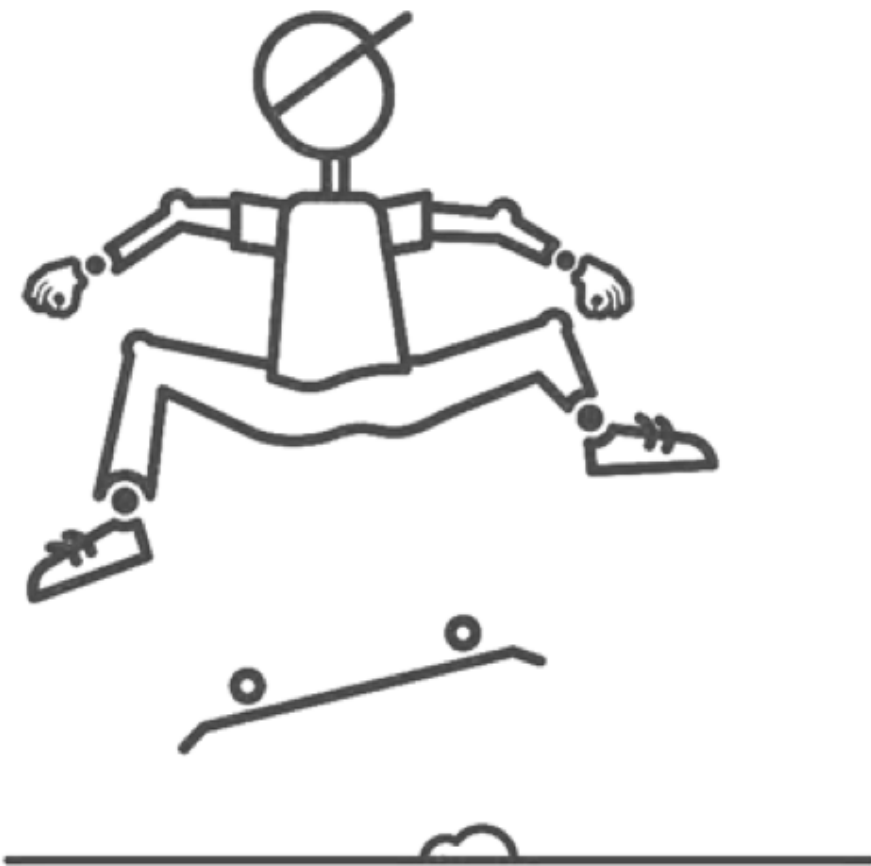
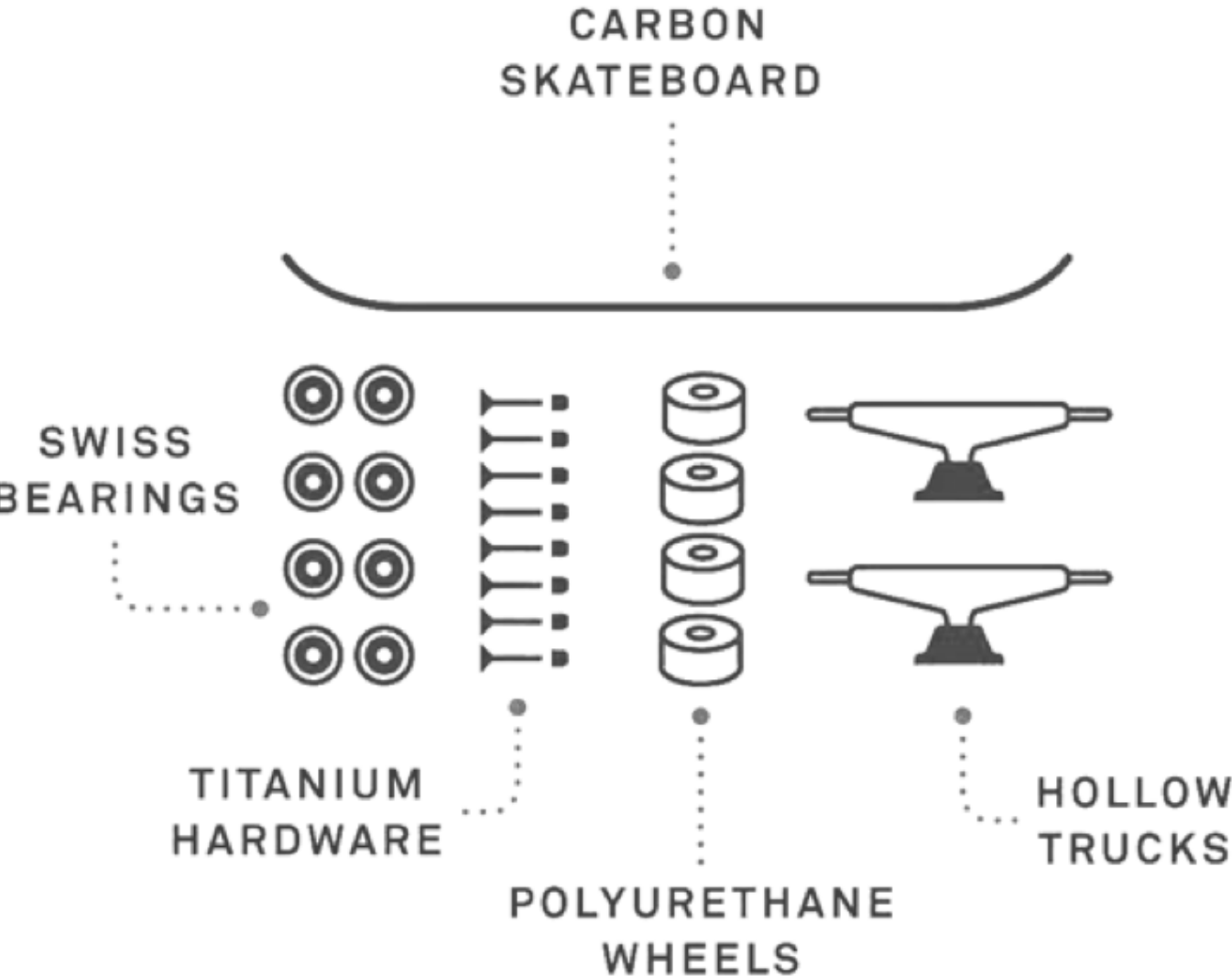
- John Naisbitt

**Unless someone like
you cares a whole
awful lot,
nothing is
going to get
better.
It's not.**



Even though customers buy this...

...they *really* want this.



Social impact



Self-transcendence

Life changing



Provides hope



Self-actualization



Motivation



Heirloom



Affiliation and belonging

Emotional



Reduces anxiety



Rewards me



Nostalgia



Design / aesthetics



Badge value



Wellness



Therapeutic value



Fun / entertainment



Attractiveness



Provides access

Functional



Saves times



Simplifies



Makes money



Reduces risk



Organizes



Integrates



Connects



Reduces effort



Avoids hassles



Reduces cost



Quality



Variety



Sensory appeal



Informs

Time to choose

