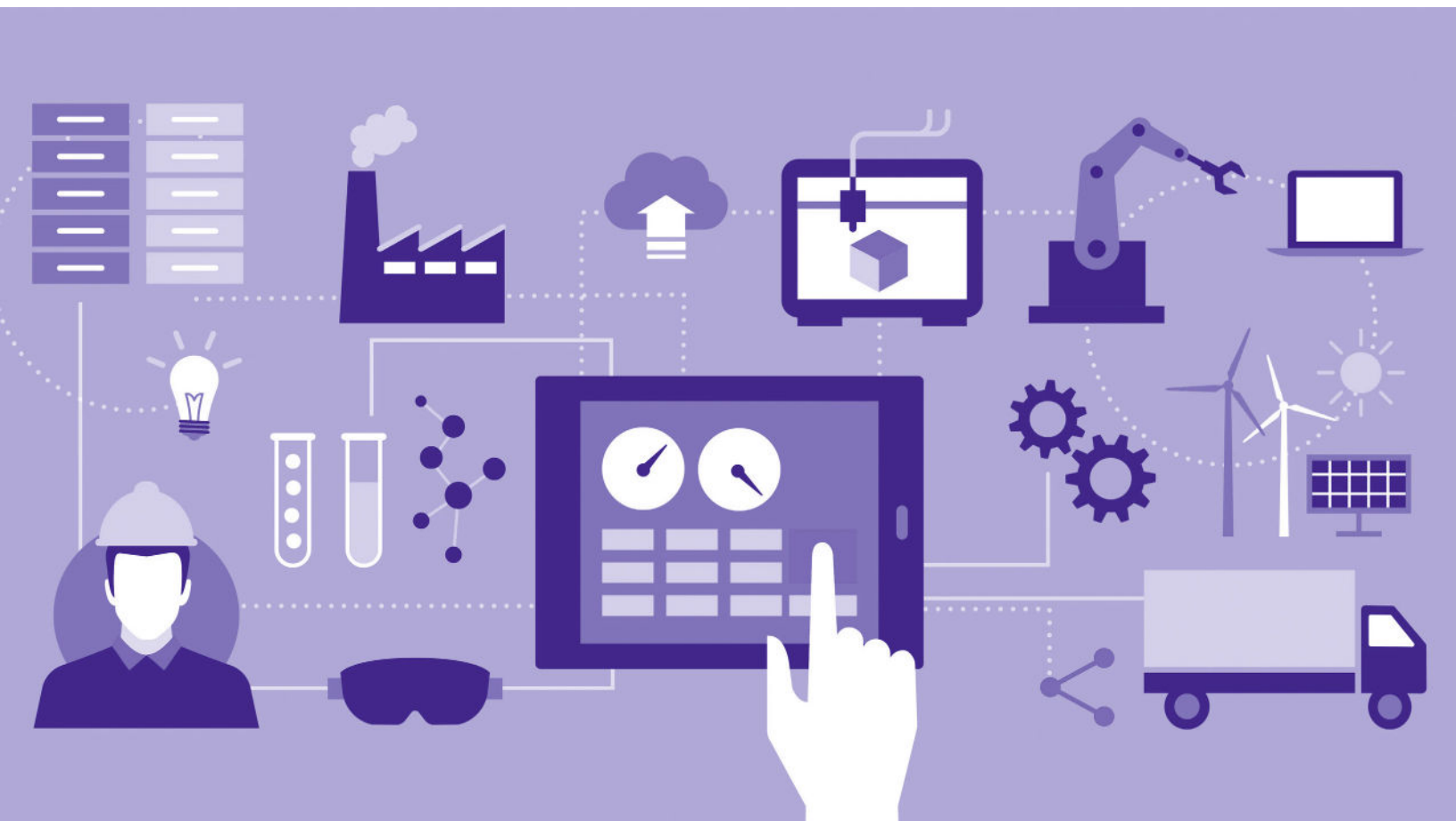


EBOOK

# Unlocking Growth and Retention in Manufacturing With Customer AI Analytics

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## In the dynamic landscape of manufacturing, complexity intertwines with a heightened focus on customer satisfaction.

This ebook was a collaborative effort between Chris Gopal, Kevin O'Meara, Richard Owen, Maurice FitzGerald and represents insights from OCX Cognition's Customer AI.

**The past decade has witnessed a plethora of challenges**, from global pandemics to geopolitical shifts, disrupting supply chains with alarming regularity. Amidst these trials, manufacturers are compelled to re-evaluate their operational strategies. Corporate commitments to Environmental, Social, and Governance (ESG) principles and Scope 3 emissions targets intensify the scrutiny on supply chains. Concurrently, competitive pressures underscore the paramount importance of customer-centric execution.

This paper zeroes in on Business-to-Business (B2B) and Business-to-Business-to-Consumer (B2B2C) manufacturers, spotlighting the transformative potential of Customer AI technologies on analytics and outcomes. By striking a delicate balance between financial optimization and customer-driven growth, these businesses can revolutionize their operations. Central to this paradigm shift is the retention of existing B2B customers and productive channels, and the strategic up-selling of products and services to both groups.

A mere three years ago, navigating these trade-offs relied heavily on conjecture, supplemented by scant customer data gleaned from surveys. However, the advent of predictive and generative customer AI analytics heralds a new era of sophisticated decision-making. Companies embracing such technologies are poised to gain a competitive edge, setting strategic priorities that align seamlessly with customer needs and market dynamics.

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# Top Manufacturing Challenges in 2004 and Beyond

Navigating the intricate landscape of manufacturing entails striking a delicate equilibrium between customer-centric growth objectives and the imperative of fortifying supply chain resilience.

The forthcoming decade will witness industry leaders capitalizing on opportunities spawned by the integration of Customer AI analytics, forging data-driven operational models finely attuned to customer needs.

## **The Impact of Global Turmoil**

The seismic disruptions catalyzed by the Covid-19 pandemic have redefined the contours of global supply chains, with heightened scrutiny on Chinese sourcing. Concurrently, geopolitical conflicts, not confined to the Middle East alone, reverberate across supply chains worldwide. Civil unrest in Africa and Latin America impinges on vital commodities, amplifying supply chain vulnerabilities. Political interventions wield unprecedented influence, epitomized by the escalating economic rivalry between the USA and China, catalyzing the resurgence of 're-shoring' initiatives.

## **Navigating Climate Change Challenges**

Climate change emerges as a pivotal factor reshaping supply chain dynamics. Instances like water shortages impacting Panama Canal operations underscore the imperative of climate resilience. The ripple effects of climate change reverberate throughout the food industry, accentuating supply chain disruptions. Legislative mandates, such as the European Union's Corporate Sustainability Report Directive, underscore the regulatory imperative to bolster Corporate Social Responsibility initiatives.

## **Customer-Centric Imperatives**

In an era characterized by intense competition and diminishing margins, customer-centricity emerges as the linchpin of manufacturing and supply chain strategies. The erstwhile financialization of supply chains, fixated on optimizing balance sheets, confronts the exigency of delighting customers and fostering differential experiences. Elevating customer lifetime value assumes paramount importance, positioning customers as strategic assets akin to inventories on the balance sheet.

## **Embracing the Era of ‘Bits + Atoms’**

The convergence of digital and physical realms has ushered in a new paradigm in manufacturing, where products are imbued with significant digital components. This transformative shift not only unlocks avenues for differentiation and subscription models but also necessitates a recalibration of capabilities to navigate heightened complexity.

## **The Evolution of Manufacturing Excellence**

Traditionally, manufacturing excellence revolved around optimizing logistics and ensuring hardware reliability to guarantee timely delivery, seamless installation, and uninterrupted functionality of products. However, consumer expectations have evolved in tandem with technological advancements. For example, today’s consumers demand the ability to control their home environment with a tap on their smartphone, blurring the lines between physical appliances and digital interfaces.

## **The Demise of ‘Sell and Forget’**

The traditional ‘sell and forget’ approach has become obsolete across various product categories, ushering in an era where ongoing engagement and data-driven insights reign supreme. This shift has unleashed a torrent of data through commerce, support, and Internet Of Things applications, empowering manufacturers with unprecedented visibility and opportunities for value creation.

## **The Changing Role of Channels**

Distributors and resellers, once deemed as indispensable shock absorbers, are grappling with diminishing relevance in an age of lean inventories and direct-to-consumer models. The ascendancy of direct engagement models has elevated customer expectations, rendering traditional distribution channels less influential. Consequently, the margin squeeze on distributors has eroded their incentive to mediate in customer interactions.

## **The Imperative for Predictability**

In this landscape defined by heightened customer expectations, ethical considerations, and relentless digital disruption, manufacturers are under pressure to deliver consistent, superior performance. Achieving this demands enhanced predictability across both customer experience outcomes and supply chain performance. Traditional management methodologies falter in this data-intensive milieu, underscoring the urgency for AI-driven solutions to navigate the complexities of the digital age.

In essence, the future of manufacturing hinges on the seamless integration of digital prowess and operational excellence, with Customer AI poised to illuminate the path forward.

# Addressing Challenges With Customer-Centric Solutions

In today's dynamic marketplace, manufacturers face an urgent imperative to enhance their data and analytics capabilities to navigate the intricate trade-offs between customer satisfaction and financial performance.

What was once a delicate balancing act now necessitates a sophisticated analysis of operational models to drive informed decision-making. So, what does this entail?

## The 'Customer-Back' Paradigm in Supply Chain Design

The cornerstone of this transformation lies in the development of a newly optimized supply chain model, one that pivots towards a "customer-back" approach. Unlike traditional methods that start with components and suppliers, this innovative model is rooted in a profound understanding of customer behaviors and preferences.

## Practical Implementation

This approach entails establishing a robust link between critical operational metrics, such as Key Performance Indicators (KPIs), and their impact on customer outcomes. For instance, how does a variation in shipping times affect customer experience, and consequently, financial performance? These models are dynamic, adapting to evolving competitive landscapes and shifting customer expectations. What's deemed crucial for success today may vary tomorrow, necessitating continuous recalibration.

## Customer Segmentation Dynamics

Moreover, the supply chain of the future will grasp the nuances of customer segmentation and its ramifications on operational decisions. While certain operational factors may remain consistent across segments, the performance expectations may diverge. For instance, larger enterprise clients may prioritize delivery reliability over speed, altering the operational yardstick for success.

## **Financial Considerations**

Different customer segments inherently entail distinct financial characteristics, shaping the optimal performance benchmarks. While balancing cost and customer experience has traditionally guided operations, this equilibrium is now quantified in precise operational goals, with a keen understanding of their impact on revenue.

## **Elevating Customer Focus**

Furthermore, recent supply chain disruptions underscore the imperative for manufacturers to pivot swiftly, safeguarding supply while mitigating cost escalations. Yet, merely achieving these objectives overlooks a critical dimension: understanding their ripple effects on customer retention and purchasing behaviors.

## **Ethical Imperatives in B2B2C Environments**

In B2B2C landscapes, an increasing number of end consumers prioritize the ethical considerations of supply chains, influencing their purchase decisions. Understanding the magnitude of these effects and predicting them is paramount. Tools that enable the analysis and forecasting of such impacts are indispensable, especially in an age where a single influencer's endorsement can sway millions. As Supply-Chain veteran Chris Gopal explains:

“Sustainability poses a significant risk for companies, as their primary focus is typically on shareholder interests rather than environmental concerns. The challenge lies in deciding whether to prioritize shareholders exclusively or consider the broader spectrum of stakeholders.”

Acknowledging this reality, manufacturers must adopt mechanisms that facilitate supply chain design from a customer-centric lens while remaining attuned to evolving customer needs. In essence, the future of manufacturing hinges on a holistic integration of customer-centricity, data-driven decision-making, and sustainability imperatives, with a relentless focus on driving superior outcomes for both shareholders and stakeholders alike.

## **Customer Understanding and The Quest for a 360° View**

The pursuit of a comprehensive understanding of the customer is not novel, yet its practical implementation has posed persistent challenges. Despite these hurdles, the imperative of equipping team members with holistic insights into customer performance remains undiminished.

## **Navigating Functional Silos**

In an organizational landscape marked by entrenched functional silos, the imperative lies in empowering customer-facing teams to transcend the confines of narrowly defined roles. Providing them with a panoramic perspective enables more informed decision-making. In an era where discussions often revolve around the integration of AI, the true leverage might lie in arming teams with enriched datasets.

## **Real-Time Insights**

Moreover, the envisioned customer 360° view must be dynamic and accessible in real time. The ramifications of inaction towards at-risk customers are profound, with re-mediation costs piling in comparison to potential revenue loss or client defection. Timely identification of risks or opportunities is paramount, as unaddressed issues fester and customer sentiments ossify. Rapid response capability not only mitigates risks but also underscores organizational commitment to customer experience excellence.

## **The Digital Imperative**

While manufacturers may have lagged behind purely software-driven enterprises, the tide is turning rapidly. Beyond cost efficiencies, the lodestar of digital transformation lies in elevating customer experience. This entails fostering increased visibility, personalized communication, and enhanced service levels throughout the customer journey.

## **Strategic Digital Investments**

In the face of myriad digital opportunities, the crux lies in aligning investments with customer experience enhancement. Leaders must cultivate a nuanced, analytical understanding of customer priorities, gaps, and risks. Relying solely on internal perspectives risks succumbing to organizational politics or functional myopia. The age-old caution against “concreting the cow-paths” resonates anew, underscoring the need for strategic clarity in digital investments. Companies armed with profound customer insights will not only identify prime investment avenues but also gauge progress in terms of tangible customer experience enhancements as digital transformation unfolds.

In essence, the journey towards a 360° view of the customer demands a strategic melding of real-time insights, organizational agility, and targeted digital investments, all converging towards the singular goal of delivering unparalleled customer experiences.



## **Navigating the Digital Terrain**

The burgeoning digitalization of manufactured products has ushered in an era characterized by subscription services, regular software updates, and Internet of Things applications as standard offerings. The days of 'sell and forget' are a relic of the past. BMW's ill-fated attempt to introduce a subscription fee for heated seat functionality serves as a stark reminder of the perils of misjudging customer sentiment. Manufacturers must remain vigilant, probing into how such decisions impact consumer perceptions and purchase behaviors.

## **Maintaining Product Experience Excellence**

While positive initial product experiences lay a solid foundation, their longevity hinges on seamless firmware and software updates. Manufacturers must possess the acumen to discern shifts in customer sentiment over time, ensuring that product enhancements resonate positively with their audience.

## **Building Resilient Supply Chains**

The seismic disruptions wrought by the Covid-19 pandemic and global conflicts have underscored the imperative of cultivating resilient supply chains. In the words of Kevin O'Meara, head of business transformation at Shaw Industries:

“ When COVID hit, global trade stopped, exposing supply chain vulnerabilities. This raised questions: what scenarios might arise, and how do we protect ourselves? To anticipate unforeseen events, we need early warning systems. These systems use key indicators, like red flags, to monitor risks. When a red flag consistently rises, it's time to act and mitigate potential threats.”

## **Adapting to Shifting Supply Chain Dynamics**

Macro-level shifts in supply chain dynamics are already underway, epitomized by the relocation of production from remote locales to more proximate destinations. For instance, numerous American firms have repatriated manufacturing operations from China to the USA or Mexico, driven by a confluence of factors including labor cost considerations and geopolitical risks. Such transitions ripple across cost structures, customer sentiments, and purchasing patterns, necessitating agile responses.

## **The Imperative for Advanced Analytics**

In the face of mounting complexity, manufacturers are gravitating towards sophisticated analytics solutions to decipher the intricacies of evolving supply chains. Speed is of the essence; rapid analytics enable swift decision-making in an environment characterized by unprecedented dynamism. In essence, as the digital landscape continues to evolve, manufacturers must embrace a proactive stance, leveraging advanced analytics to navigate uncertainty, fortify supply chain resilience, and deliver unparalleled customer experiences.

## **Navigating Channel Dynamics**

In the ever-evolving landscape of distribution, manufacturers face the imperative of effectively managing their channel networks. This entails not only selling directly to customers but also cultivating robust relationships with key distributors and leveraging digital platforms to engage with consumers. With customers increasingly accustomed to direct procurement, the onus falls squarely on manufacturers to provide seamless support and clear communication channels, even when issues arise. The customer experience transcends the channel; it's the end customer who shapes perceptions. In short, manufacturers can no longer relegate customer interactions solely to their channel partners. Instead, they must embrace new tools to mitigate risk and enhance predictability in this evolving paradigm. As Chris Gopal explains:

“ Channels don't define the customer experience; it's defined by the customer's interaction with them. For example, if there's an issue with a Dell product, customers won't complain to UPS, but rather directly to Dell. This places the responsibility for customer satisfaction squarely on the manufacturers.”

## **Adapting to Climate Change**

The specter of climate change looms large over supply chains, necessitating proactive adaptation strategies. From water shortages disrupting logistics to crop failures reshaping sourcing dynamics, manufacturers must anticipate and integrate climate-related disruptions into their operational scenarios. With the recurrence of such events foreseeable, resilience planning becomes paramount.

Furthermore, the global ramifications of climate change extend beyond mere logistics, impacting demand patterns and regulatory landscapes. Diseases once confined to tropical regions now proliferate elsewhere, altering demand for pharmaceutical products and necessitating agile responses.

## **Meeting Regulatory Imperatives**

The regulatory landscape is undergoing rapid transformation, with directives like the Corporate Sustainability Report Directive imposing new compliance obligations. Manufacturers must possess the agility to track and report sustainability metrics, integrating them seamlessly into their operations. With end consumers increasingly vigilant about compliance, especially concerning issues like child labor in industries such as chocolate production, manufacturers must monitor both actual compliance and customer perceptions, amplified by the ubiquity of social media.

## **Summary**

As manufacturers navigate the complexities of channel management, climate change adaptation, and regulatory compliance, embracing agility and leveraging advanced analytics becomes imperative. By proactively addressing these challenges, manufacturers can not only fortify their supply chains but also enhance their resilience and responsiveness in an ever-changing marketplace where end customer experiences loom large.

## Accelerating **Predictability** in an Unpredictable World

In an era characterized by rapid transformations, waiting for traditional annual cycles to assess impacts on product availability and lead times is no longer tenable. Real-time insights are imperative to grasp evolving dynamics as they unfold.

Fortunately, in today's environment, operational data abounds, offering a wealth of information waiting to be harnessed.

### **The Imperative of Predictability**

Enhancing predictability emerges as the linchpin in navigating the uncertainties of today's landscape. While the ideal scenario entails improved predictability across both supply chains and customer journeys, resource constraints necessitate prioritization. Effective business strategy hinges on channeling finite resources towards initiatives that deliver impact. Traditional strategy with lengthy planning horizons, will no longer suffice in our fast-paced environment. As Chris Gopal aptly notes,

“ Starting from COVID, we've started to have what we call the hundred-year cycles, crammed into five years...”

The crux lies in recalibrating strategic time horizons and implementation tactics to align with the dynamic nature of business needs.

### **Driving Agility with Data and AI**

The crux of the matter lies in leveraging data-driven insights to fuel agility and informed decision-making. While management expertise evolves gradually, data offers a real-time pulse of the business environment. In this context, shortening strategic time horizons and adapting implementation tactics based on evolving data patterns become imperative.

## From the Customer Survey to Customer AI

In the past, companies have turned to Customer Surveys in order to understand the attitudes that result from customer experiences. While valuable as an input, analytics derived from their data are inherently limited. Predictive analytics platforms, such as Customer AI, offer a paradigm shift in analytics and insight. By leveraging data from operations, AI can predict customer experience sentiment very accurately. This allows organizations to move beyond the constraints of traditional surveys and unlock unprecedented agility in improving operations. As businesses navigate the complexities of today's landscape, the ability to harness data-driven insights is a strategic imperative. Customer AI generates complete and continuous analytics that allow organizations to unlock new levels of responsiveness, and customer-centricity, propelling them towards sustained success in an ever-evolving marketplace.

Consider the perspective of McKinsey & Co.:

“ Why use a survey to ask customers about their experiences when data about customer interactions can be used to predict satisfaction.”

## Customer AI Connects Operations to Financial Outcomes

When considering the interplay between business operations and financial results, it's crucial to recognize that the path from operations to profit & loss runs through customers. As such, the unification of operational and financial performance in a single model becomes a business imperative. Consider the following principles:



To understand the connection between operations and financials we must measure experiences and attitudes.

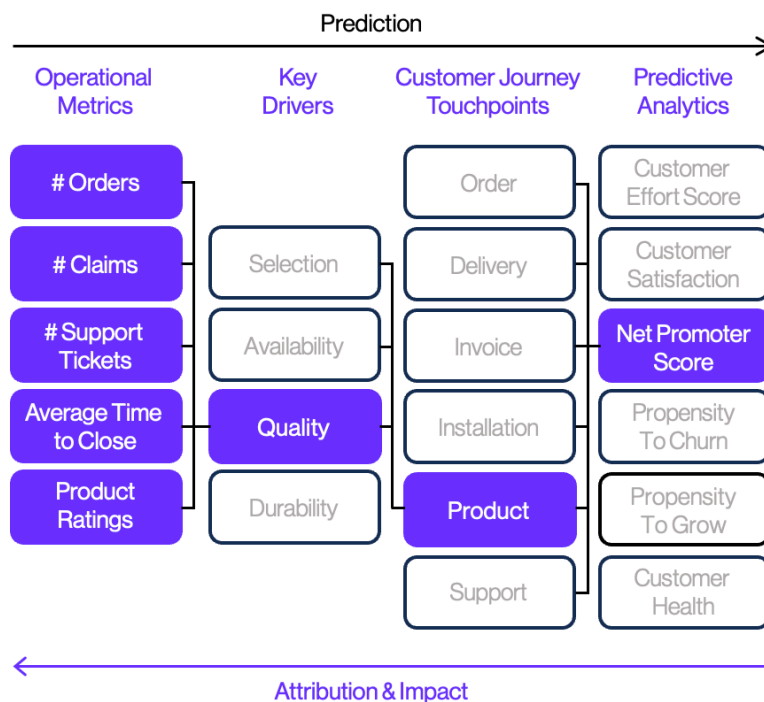
Customer AI predicts behavior & propels growth, by accounting for the effects of experiences and attitudes.

## How Customer AI Works

Within all organizations, various teams utilize specific IT systems to execute tasks and monitor performance. These systems generate a wealth of data points and trends for every customer. However, this data often remains fragmented, failing to provide a comprehensive overview. Customer AI harnesses existing data and performance metrics and combines it with feedback from your customers to generate a predictive, unified view of customer attitudes and experiences, for every customer and business segment. Because the AI system uses operational data to build predictive analytics, the analytics are continuously updated in real-time as conditions change and customers evolve. It leverages machine learning to synthesize this data, filling gaps where information may be lacking or disorganized. Moreover, it identifies optimal next steps to be taken in dynamic scenarios, pinpointing the appropriate action-taker within the organization and creating nuanced action plans for particular clusters of accounts.

## Illustrating Customer AI in Action

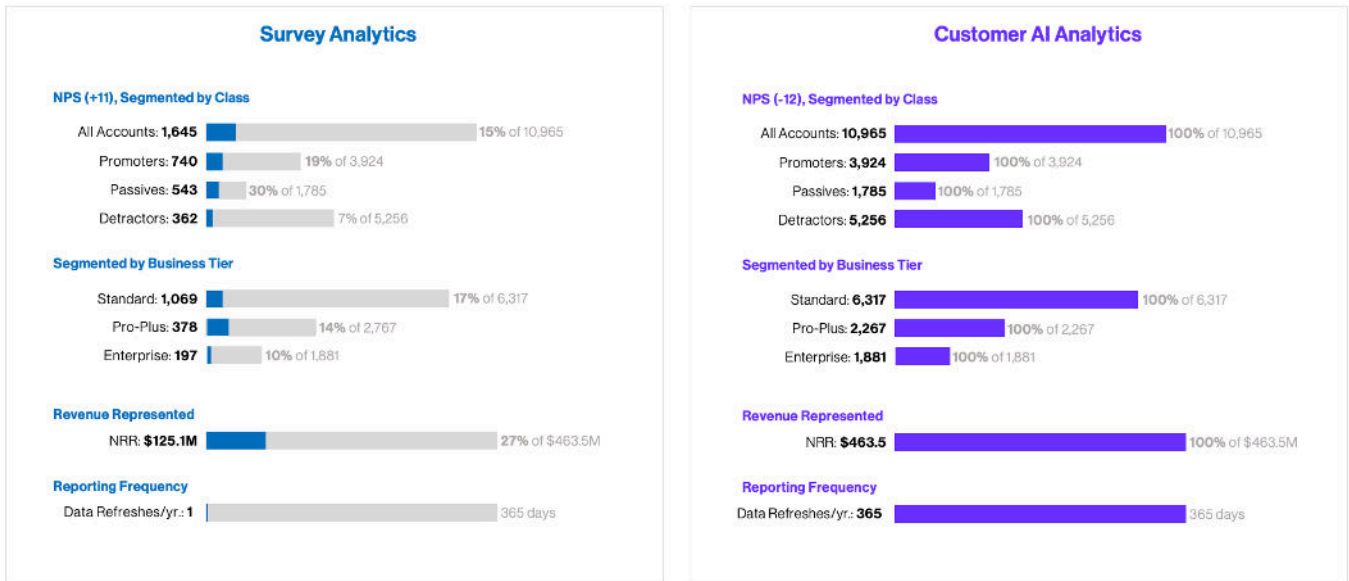
Consider an example showcasing Customer AI's impact for a home furnishings manufacturer who recently deployed Customer AI. Six key touchpoints of the customer journey are depicted, with the bar graph indicating how they impact key metrics for the business. For instance, when suffering implementation delays due to macro labor market conditions they encounter customer experience impacts that put business at-risk. Customer AI predicts these effects early before they result in widespread defection, letting them act before business is lost.



Customer AI illustrates the relative impact of each experience on key metrics like NPS & Propensity to Grow.

## Achieving 100% Customer Coverage

One significant advantage of Customer AI over Surveys is the ability to provide insights for every customer. Using data from throughout the operations, The AI generates analytics to measure every experience for each account. Contrast this with results from traditional survey-based methods that commonly produce survey response rates of 10% or less. With an AI powered approach, 100% of both customers and revenue are covered. However you will notice that NPS results dropped from (+11) to (-12) when all customers were counted.

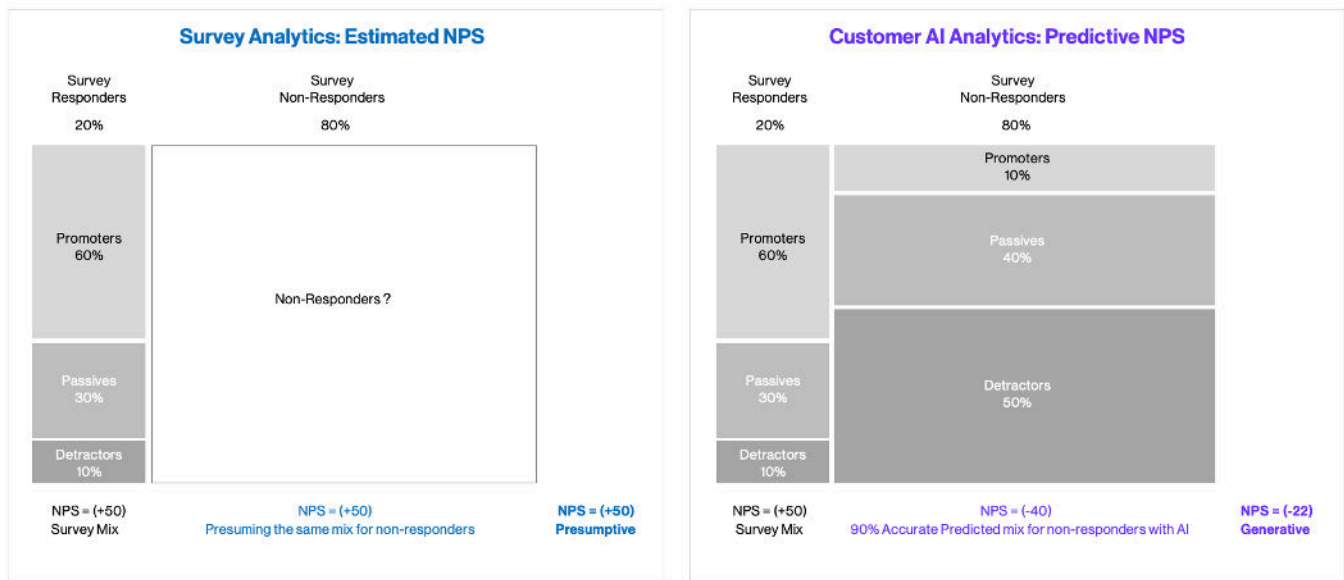


### Survey Coverage vs. Predictive Analytics With Customer AI

Example: Annual Net Recurring Revenue \$463.5M, 10,965 Customers, 10-20% Survey Response Rate

## Surveys Alone, Can Be Misleading

Studies from Bain and Company are consistent with this outcome. They find that survey samples overstate NPS by under-representing the detractors who that fail to respond in proportionally higher numbers. Using accurate AI models to predict scores for all customers, the Customer AI platform overcomes this problem, delivering a true NPS along with insights on the experiences of all customers –not just the ones that answered the survey.



Assumes a 20% Survey Response Rate Source: The Ultimate Question 2.0 Reicheld and Markey 2011 Bain & Company

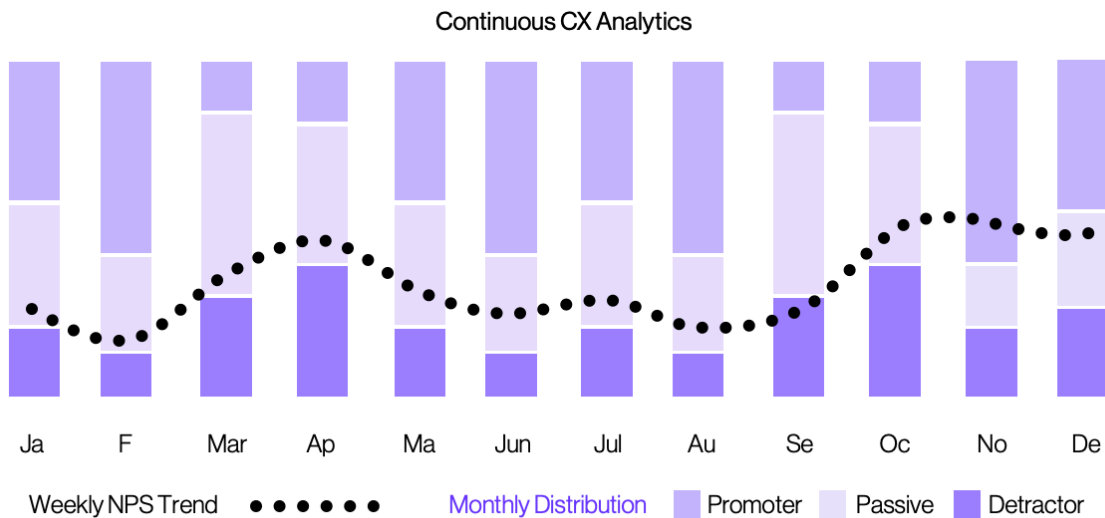
### Presumptive NPS Using Surveys vs. Generative NPS With Customer AI

Example: Manufacturer upgraded from misleading NPS to 100% Coverage and true NPS with Customer AI



## Continuous Measurement and the Supply Chains

In the dynamic landscape of manufacturing and supply chains, the loyalty and relationship health of customers and distributors are ever-evolving. To effectively manage these relationships, data must keep pace with business operations, necessitating frequent updates. Semi-annual or annual customer surveys yield incomplete and outdated insights, rendering them inadequate for proactive relationship management. By the time issues surface in the data, customers may already be entrenched in high-risk relationships, exacerbating the challenge for vendors.



### Continuous Measurement Throughout The Customer Lifecycle

Example: Manufacturer upgrades from annual surveys to weekly updates using Customer AI

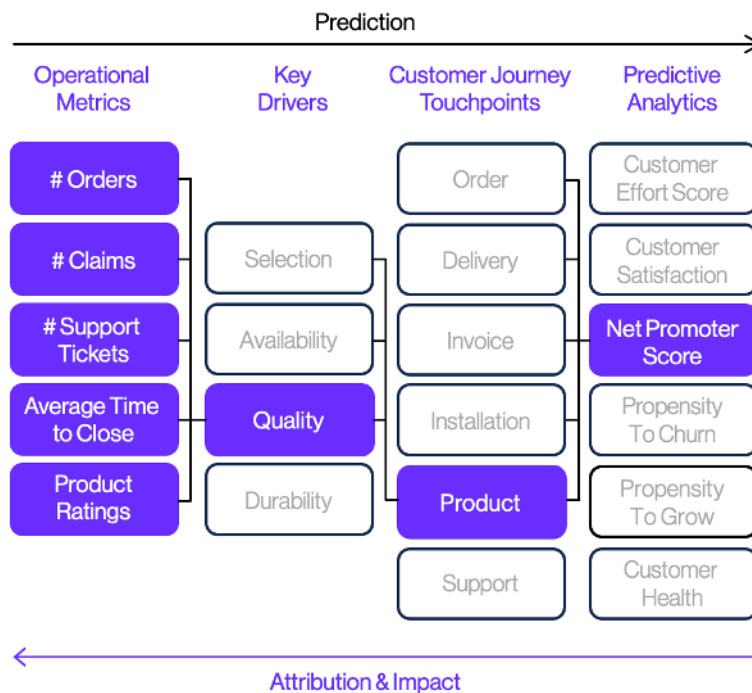
Instead of low survey response rates that come once per year, Customer AI scores are continuously updated as operational data accumulates and conditions change throughout the customer life-cycle. Using this approach, this same manufacturer generates analytical updates on the state of all customers weekly unlocking the advantages of data-driven decision-making based on the attitudes of customers throughout the customer life-cycle.

### Accelerating Resolution With Real-Time Insights

Swift resolution of customer challenges is imperative, driving down costs, preserving relationships, and fostering greater engagement from customer-facing teams. Real-time data alerts them to risk and opportunity, empowering proactive intervention and relationship nurturing.

## Integration With Operational and Customer Value Chains

Traditional forecasting methodologies often lack granular attribution to underlying causes, hindering informed decision-making. Customer AI bridges this gap by providing detailed connections between top-level predictive analytics and operational metrics. Consider the example of a home furnishings manufacturer monitoring NPS, where Customer AI identifies operational drivers impacting software capability, enabling targeted insights.



### Journey Touchpoints, Drivers, and Operational Metrics /KPIs.

Example: Manufacturer connects operating KPIs to key business metrics including NPS with Customer AI

One of the top-level metrics they choose to monitor is Net Promoter Score or NPS. While they previously measured NPS using an annual survey, Customer AI has unlocked an unprecedented ability to explore root causes for NPS within their operations. The diagram above illustrates a particular attribution path that explores the impacts of Product Quality on NPS. More importantly though, the effects on Product Quality can be traced to underlying operational metrics and KPIs already being measured throughout their business. This connects NPS directly to actionable areas of the operation and measures the relative impact of diffuse operational components on customer experience with an objective data-driven model. With these new analytics in hand, this manufacturer is able to weigh product roadmap, production planning and budget decisions using customer impact as part of the equation. Further, Customer AI models display positive and negative thresholds for each of their existing KPIs, making it possible to tune KPIs targets to proper levels in a quantifiable way.

## Dynamic Channel Engagement Measurement

For B2B channel partners, the buying, production, and delivery stages mirror those of end customers, influencing their propensity to continue buying. However, post-delivery interactions diverge, with end customers often engaging directly with manufacturers for support. Leveraging existing IT systems, Customer AI enables comprehensive understanding of operational performance impacting channel satisfaction, facilitating resource allocation for enhanced partner engagement.

In essence, by embracing continuous measurement and leveraging Customer AI, manufacturers can gain actionable insights, drive operational improvements, and cultivate lasting customer and partner relationships in an ever-evolving marketplace.

## Ideal Customer Profiling and Segmentation for Sales Success

Sales teams often operate with a broad approach, targeting any potential customer willing to make a purchase. However, this indiscriminate strategy can lead to inefficiencies and undesirable outcomes. Consider the following scenarios:

- **Some customers fail to renew** contracts or make repeat purchases.
- **Deals are closed** with customers who continuously negotiate prices downwards.
- **Products or services underperform** in certain industries, resulting in additional costs.
- **Certain customers impose excessive demands** on sales teams, consuming valuable time and resources.

In contrast, ideal customers represent a perfect match for your offerings, require minimal support, consistently renew contracts, and drive additional revenue through expanded usage. Identifying and targeting these ideal customers can significantly enhance sales efficiency and profitability.

## Unlocking the Ideal Customer Profile

Ideal customers exist within your current customer base, yet their characteristics remain hidden without proper analysis. Machine learning solutions like Customer AI possess the capability to unearth these ideal profiles by analyzing extensive datasets. These ideal customers typically exhibit traits such as high renewal rates, low support requirements, and minimal negotiation on pricing.

## Leveraging Data for Strategic Sales Targeting

By discerning patterns within the data, companies can optimize their sales strategies in two key ways:

- 1. Future targeting:** Sales teams can focus efforts on prospects that align with the identified ideal profiles, increasing the likelihood of success.
- 2. Existing customer optimization:** Companies can selectively tailor efforts towards existing customers, guiding them towards the ideal profile through targeted interventions.

Moreover, insights derived from Customer AI may reveal correlations with specific industries, geographic regions, or seasonal factors, aiding in strategic decision-making and resource allocation.

Ultimately, identifying and targeting ideal customer profiles empowers sales teams to operate more efficiently, drive higher conversion rates, and cultivate long-lasting, mutually beneficial customer relationships.

## Facilitating Informed Investments

Customer AI facilitates informed investment decisions by identifying areas for improvement based on real-world data. By incorporating financial metrics, it quantifies the potential impact of improvement initiatives, enabling companies to prioritize investments effectively.

Moreover, Customer AI removes subjectivity from decision-making, replacing it with data-driven insights. This approach ensures that investments are aligned with strategic objectives and have tangible financial benefits.

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## Conclusion

In today's rapidly evolving business landscape, relying solely on intuition and personal experience for decision-making is no longer viable. Companies must embrace data-driven management practices to stay competitive. Customer AI empowers organizations to understand customer dynamics, identify investment opportunities, and take decisive actions at an unprecedented pace. Those who lead this transition will emerge as winners in the fiercely competitive market landscape of the 21st century.

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