

Authentic Communication Workshop with Maddock Douglas

Maddock Douglas, Inc. will deliver an interactive, one-day workshop with the objective of aligning marketing, compliance, operations and other key areas around the major market opportunity to improve overall customer experience through authentic language.

We believe that this workshop is in a unique position to significantly exceed the current industry standard, thereby impacting business outcomes.

SESSION DETAILS

Duration:	8:30 a.m. - 4:45 p.m. including meals and breaks
Date and location:	TBD. Facility, food and beverages provided by client
Number of participants:	20 - 40
Program cost:	\$30,000 plus travel expenses for three people
Materials:	Included

Prework: Client will identify a spectrum of key customer acquisition and service communications to use as subject matter for the workshop. If desired, Maddock Douglas will design a pre-session communication to ground participants and prepare them for the day.

AGENDA SUMMARY

8:30 a.m. - 9:00 a.m.	Breakfast
9:00 a.m. - 9:30 a.m.	Purposeful Introductions/Expectation Setting
9:30 a.m. - 10:45 a.m.	Authentic Communication Study + Q&A
10:45 a.m. - 11:00 a.m.	Break
11:00 a.m. - 12:00 p.m.	Authenticity Evaluation Exercise
12:00 p.m. - 1:00 p.m.	Lunch
1:00 p.m. - 2:00 p.m.	Case Study
2:00 p.m. - 3:00 p.m.	Authenticity Implementation Exercise
3:00 p.m. - 3:15 p.m.	Break
3:15 p.m. - 4:00 p.m.	Measuring Success
4:00 p.m. - 4:45 p.m.	Open Dialogue and Close

AGENDA DETAILS

- 1) PURPOSEFUL INTRODUCTIONS/EXPECTATION SETTING:** This will ground people in our purpose for the day and break the ice and help people begin thinking about authenticity and their role in client's customer experience.
- 2) AUTHENTIC COMMUNICATION STUDY:** We will present the research findings in a compelling, entertaining and thought-provoking way. This will include a detailed explanation of the six elements of authentic communication as well as business implications.
- 3) AUTHENTICITY EVALUATION EXERCISE:** We will break people into smaller groups of four to five and give them a challenge around one of the client's key communications chosen beforehand. Teams will assess the communication against a consumer profile, using the six authenticity elements, and do an objective rating. Then they will identify some ideas about how to improve it and, equally important, what challenges they will face in doing so. This would also illuminate disconnects between consumer touch points and how they may be impacting the experience.

AGENDA DETAILS (continued)

- 4) **CASE STUDY:** We will present a case study that shows the journey of another insurance company (health insurance) and how the change in communication was a strategic imperative, generating significant business results versus an initiative by one company. This will further stimulate conversation about what is possible relative to the authentic experience and inspire new solutions and possibilities.
- 5) **AUTHENTICITY IMPLEMENTATION EXERCISE:** Teams from the previous exercise will then work together and answer questions relating to their ideas. For example: How would we implement these new ideas? What are the key things in our current process/the way we work that we would need to change in order to successfully implement the ideas? How might we change how we work to enable new thinking like we did today? Teams would document their responses and then share out with the entire group.
- 6) **MEASURING SUCCESS:** Introduce the concept of doing an Authenticity Baseline Study to test the consumers' actual view of key communications. The baseline is a diagnostic to show where the client is today on the authenticity elements relative to a particular part (or parts) of the customer experience, and it is used as a tool to track improvements.

Maddock Douglas will be sending a team of dynamic practitioners with experience in marketing, research, customer acquisition, creative problem solving and innovation. You can expect not just theorists, but people who have actually been in the trenches, solving similar issues.



Maria Ferrante-Schepis | EVP and Managing Principal, Insurance and Financial Services Innovation

With more than 25 years as an executive in the insurance and financial services industry, holding officer roles at Guardian, Prudential, and Bankers Life and Casualty of NY, Maria is focused on innovation, recognizing the significant public and government demand for change. Her mission is to enable like-minded executives to proactively shape their own future versus having it shaped for them.

Maria is a frequent industry speaker and columnist for the National Underwriter Life & Health Edition. She has also co-authored the book: *Flirting With the Uninterested – Innovating in a "Sold, Not Bought" Category*. In 2015, National Underwriter named Maria one of the *20 Most Creative People in Insurance*.

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Brett Miller | Senior Vice President Creation and Co-creation

Brett (described as an Insight Whisperer and an Idea Architect) is a senior vice president at Maddock Douglas. He is a 20+-year veteran who has spearheaded domestic and international innovation initiatives for such clients as Allstate, Blue Cross Blue Shield, BP, Chase, GE, Kellogg's, KIA, Kohler, Kraft, LG, Levis, MetLife, Miller Brewing Company, Nationwide, Samsung, Starbucks, Toyota, Unilever, Wal-Mart and Whirlpool to name a few. Brett graduated with a B.A. in Psychology from Wabash College, has studied creative problem solving at the Creative Problem Solving Institute, and improvisation at the Players Workshop of the Second City. He is a contributing author of *Brand New: Solving The Innovation Paradox*. Beyond his day job, Brett is a visual artist working in acrylics, oils and found objects.

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Luisa Uriarte | EVP and Managing Partner

Luisa is a researcher, an innovation (Ring)leader and a writer. She is responsible for overseeing innovation projects and has more than 20 years of experience in leading research engagements of international scope, covering more than 30 countries worldwide. The clients for which Luisa has overseen marketing and innovation assignments include ExxonMobil, Burberry, Brahma Beer (now Anheuser-Busch InBev), Miller Beer and Wal-Mart. Formerly, Luisa served at Markitecture, Copernicus and Yankelovich Partners, during which time she was instrumental in establishing international offices in Brasil and United Arab Emirates. She holds a Bachelor of Science in International Affairs from Georgetown's School of Foreign Service. She is also co-author of the book *Brand New: Solving The Innovation Paradox*.

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If you care to review additional information about our firm in advance, please visit www.maddockdouglas.com.