



Growth • Innovation • Leadership **Council**

F R O S T & S U L L I V A N

NAVIGATE THE FUTURE OF DISRUPTION AND TRANSFORMATION WITH CONFIDENCE

*The Growth Pipeline™ Company
Powering clients to a future shaped by growth*



TODAY'S AGENDA

- Then & Now
- Our Shared Mission
- Designed to Support You
- Critical Issues
- What We Do & How We Do It
- Growth Diagnostic & Benchmarks
- Associate Membership (Team Benefits)
- Testimonials, Benefits Summary & Contact Information



THEN & NOW



THEN & NOW: THE BEGINNINGS OF THE COUNCIL

Executive Events
division launched.

The Growth
Innovation
Leadership Council
is expanded to
include Global
Executive
MindXchange series.

Virtual events are
redefined and
Council activities
move forward
unhindered.

1961

1970

2002

2006

2016

2021

Frost & Sullivan was
founded as a research
and consulting firm
focused on new
technologies,
distribution channels
and business trends.

The Events Division
launches: Growth,
Innovation and
Leadership: North
America.

The Growth
Innovation Leadership
Council is founded as
a member-driven
organization.





OUR SHARED MISSION





OUR SHARED MISSION

Member-Driven ● Global ● Future Focus



Cross-Functional ● Facilitated ● Cross-Industry



SUCCESS



Executives want an opportunity to **continuously engage with a cross-industry network of peers** to explore future focused critical issues.



Executives want a collaborative forum where content is **member-driven**, aligned with critical issues and constantly evolving.



Executives are searching for **current thought leadership** to bring a higher level of strategic insights and data to interactions with senior management and the C-Suite.



DESIGNED TO SUPPORT YOU



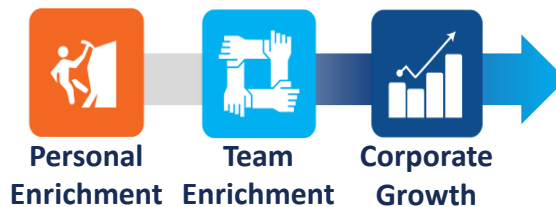
/Administration
/Human Resources
/Legal
/Accounting
/Finance
/Marketing
/Publicity

/Promotion
/Research
/Business
/Development
/Engineering
/Manufacturing
/Planning

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DESIGNED TO SUPPORT YOU: YOUR STRATEGIC OBJECTIVES



Propelling Leadership & Recurring Inspiration

Timely, unique ideas and how to overcome perennial obstacles are shared through peer-to-peer discussions, workshops and an internationally recognized executive coach. The takeaways are driven to enrich and inspire our members by delivering real world success stories, lessons learned and best practices you can immediately apply to your strategy, processes and operations.



Industry & Community Relationships

The Council features access to a series of events throughout the year to provide virtual and in-person interaction with executives across industry and related lines of business. Get fresh perspectives on your challenges, collaborate with peers and share insights generated from curated content and Frost & Sullivan research.



Experiential Learning

Experience excellence in action by touring cutting edge Innovation Centers and directly interact with the innovators driving change.



Be Forward Thinking

Find the Mega Trends and emerging technologies to disrupt the status quo and move your enterprise forward.



Advancing the Organization and Growing Your Future Leaders

Award access to Council thought leadership and best practices with peers and rising stars. Identify and support future leaders with content and conversations that will prepare them for the next step in their career.



Benchmarking Your Company

Identify the areas you are excelling and where you may be falling behind by participating in Frost & Sullivan's three unique proprietary benchmark studies (Growth Diagnostic, Marketing and Contact Center). Upon completion, your team will receive a personalized readout, inclusive of recommendations by an Industry analyst.



CRITICAL ISSUES





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Team
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CRITICAL ISSUES: 2021 AGENDA *

**Access the Critical Issue homepage via hyperlink.*

Each year, Council members come together to meet one another and collaborate to set the Critical Issues Agenda for the year ahead. These issues then guide the development of our live events, virtual events, and curated content on the member-only portal. Setting the Critical Issues Agenda is a key role in ensuring the content for the Council is driven by its members.

Business Model Strategy

**Integrating New Disruptive
Technologies into
Your Innovation Portfolio**

**Translating Consumer Trends
into Business Opportunities**

Nurturing an Innovation Culture

**Mapping Future
Customer Experiences**

Rationalizing Risk in Innovation



WHAT WE DO & HOW WE DO IT



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DELIVERABLES & COLLABORATION





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COMMUNITY & NETWORK: GLOBAL & CROSS-INDUSTRY MEMBERSHIP

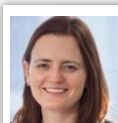


COUNCIL SNAPSHOT



ERIC AGDEPPA

Executive Director and
General Manager, Global Innovation
Hillrom



RACHEL BERGMAN

Vice President of Strategy
and Planning, US Markets
Transunion



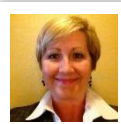
APRIL BERTRAM

Senior Director, Business
Development
GOJO



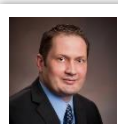
JOHN COTE

Global Marketing Leader
Baker Hughes



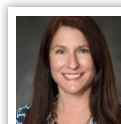
ANGELA FEMMER

Director, Competitive Positioning
Brewer Science



MARCO KIRCH

Vice President, Digitalization & Global IT
Vinventions USA



BEVERLY RIDER

Senior Vice President &
Chief Commercial Officer
Hitachi America



BILL SEXTON

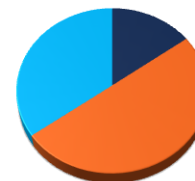
Vice President,
Customer Relationship Management
Global Industrial

INDUSTRIES REPRESENTED

- Aerospace & Defense
- Agriculture & Nutrition
- Automotive & Transportation
- Chemicals & Materials
- Consumer Goods
- Electronics & Sensors
- Energy & Utility
- Environmental & Building Technologies
- Financial Services
- Healthcare
- Industrial Automation
- Information & Communication Technologies
- Test & Measurement Instrumentation

FUNCTIONAL ROLES REPRESENTED

- C-Suite
- Innovation
- Business Development
- Technology
- Digital Transformation
- Strategic Planning
- Strategy Intelligence
- Product Strategy & Development
- Research & Development
- Sales & Marketing
- Customer Experience



■ C-Suite

■ SVP, VP

■ Director



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FROST & SULLIVAN EXECUTIVE MINDXCHANGES*

**Click on an event icon for more event details.*



**The Future of Innovation: A Frost & Sullivan
VIRTUAL Executive MindXchange**



**Growth, Innovation and Leadership:
The Growth Pipeline Experience**



**New Product Innovation & Development:
A Frost & Sullivan Executive MindXchange**



**Customer Experience Ecosystem:
A Frost & Sullivan VIRTUAL Executive MindXchange**



**Sales Team Accelerator Retreat:
A Frost & Sullivan Executive MindXchange**



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MONTHLY VIRTUAL EVENTS

- **Virtual Roundtable** - Interactive discussions focused on one of the Council's Critical Issues, with members sharing their best practices, lessons learned, insights and experiences as it relates to the issue at hand. (60 minutes)
- **Case History** - Combination of a presentation by an industry leader and an interactive Q&A session enabling deeper discussion. (60 minutes)

SCHEDULE SNAPSHOT*

MARCH 2021

03
MARCH

FEATURED

MEET 'N' GREET
Council Virtual Event

16
MARCH

INTEGRATING NEW DISRUPTIVE TECHNOLOGIES INTO YOUR INNOVATION PORTFOLIO
Council Virtual Event

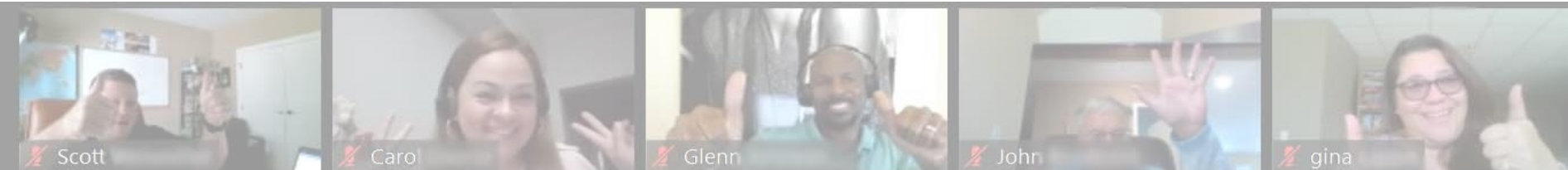
24
MARCH

REGENERATE: RENEWING YOUR ENERGY OPTIMAL PERFORMANCE
Council Virtual Event

25
MARCH

ASSOCIATE MONTHLY MEETING
Council Virtual Event

*Review the full calendar [HERE](#).





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INNOVATION CENTER TOURS



UC San Diego



SDG&E





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EXECUTIVE COACHING CLINIC



Michael O. "Coop" Cooper
Founder



Innovators + Influencers

Interactive Group Coaching Call

Gain Clarity, Create Change, and Make Progress on Your Goals, Outcomes or Strategies

Bring a Current Management Problem that You Want to Change, or Just Listen In and Learn Vicariously

Coop is an internationally recognized executive coach, advisor, facilitator, and trainer who specializes in working with executive teams to develop the leadership skills, alignment, and strategies to grow and thrive in a constantly changing environment.

He has worked with leaders at Accuray, eBay, Genentech, Google, Novell, Sony Computer Entertainment America, Southwest Airlines, TeleNav, Wells Fargo, Yahoo, Yammer, and hundreds of other organizations large and small. He has also been selected to coach the prestigious TED Fellows.
















RESEARCH: VISIONARY INNOVATION GROUP (MEGA TRENDS)

Top Technology Buzz For The Future

Examples:

- Blockchain
- Quantum Computing
- Connected Vehicles
- Sensorization of Devices
- Wearable Devices
- Digital Currency
- Personal Robots
- Flexible Electronics
- Powered Exoskeletons
- Nanobots
- Bio-Batteries

Not Exhaustive

 <u>CONNECTIVITY AND CONVERGENCE</u> <ul style="list-style-type: none">• Big Data• Augmented Reality / Virtual World• Connected Living• Space Jam• 3D/4D Printing	 <u>COGNITIVE ERA</u> <ul style="list-style-type: none">• Machine Learning• Quantum Computing• Neuromorphic Computing	 <u>BRICKS AND CLICKS</u> <ul style="list-style-type: none">• Digital Kiosks• Interactive Stores• New Retail Logistics Models• Integrated Omni Channel Marketing	 <u>SMART IS THE NEW GREEN</u> <ul style="list-style-type: none">• Smart Technologies• Smart Products• Smart Cities	 <u>SOCIAL TRENDS</u> <ul style="list-style-type: none">• Gen Y• Reverse Brain Drain• Heterogeneous Society• She-economy• Middle Class	 <u>NEW BUSINESS MODELS</u> <ul style="list-style-type: none">• Co-creation• Circular Economy• Personalization & Customization• Value for Money• Sharing	 <u>HEALTH WELLNESS AND WELL-BEING</u> <ul style="list-style-type: none">• Mind, Body & Soul• E-Health & M-Health• Gene Therapy• Non-Invasive Surgery
 <u>INNOVATING TO ZERO</u> <ul style="list-style-type: none">• Zero Vision at Work• Carbon Neutral Cities• Zero Target by Cities	 <u>ECONOMIC TRENDS</u> <ul style="list-style-type: none">• Future of Resources• Africa as the Growing Market• Next Game Changers	 <u>URBANIZATION: CITY AS A CUSTOMER</u> <ul style="list-style-type: none">• Mega Corridors• Mega Cities• Mega Regions• Mega Slums	 <u>FUTURE OF INFRASTRUCTURE DEVELOPMENT</u> <ul style="list-style-type: none">• Transport Infrastructure• Deep Sea Mining• Future of Water Infrastructure• High-Speed Rail	 <u>FUTURE OF ENERGY</u> <ul style="list-style-type: none">• Availability of Resources• Energy Harvesting• Smart Grids• Renewable Mix• Shale Gas	 <u>FUTURE OF MOBILITY</u> <ul style="list-style-type: none">• Micro-Mobility• Autonomous Cars• Telematics Based Insurance• Car Sharing• Connected Cars• Integrate Mobility	

Mega trends are transformative, global forces that define the future world with their far reaching impact on businesses, societies, economies, cultures and personal lives. Frost & Sullivan regularly monitors and reports on the trends that appear above!



RESEARCH: TECHCASTING GROUP RESEARCH

01 Scan
Technology Pool



02 Formulate
Sub-Constructs



03 Evaluate
Constructs



04 Select
Technologies



GLOBAL TRACKING

Over 3,000
Technologies
EACH Year

IP Activity

Funding

Market Potential

Megatrend Impact

Intensity of Impact

Regional Adoption Potential

Sector of Economic Impact

Year of Impact

Technology Disruptiveness

Index of Disruption

Technology Cluster
Evolution

Index of Cluster Evolution

Innovation
Index Score



Top 50
Technologies

(Near Term Impact)

+

Future 18

(Long Term Impact)



TECHNOLOGY AND TRENDS DRIVES STRATEGIC DECISIONS ACROSS THE CEO'S GROWTH TEAM



KEY ACTIONS POWERED BY TECHCASTING

ADDITIONAL ACTIONS PROVIDED BY OTHER SOLUTIONS OF F&S

Key Functions

Key Value Attributes

CEO'S GROWTH TEAM

Board of Directors	Provides a Platform for Each Member to Understand Technology Growth Opportunities	Empowers BOD to Provide Clear Governance	Enables BOD to Reinforce Growth Via Technology as a Top Objective
C Level Executive	Captures Both Incremental and Disruptive Technology Growth Opportunities	Supports Development and Implementation of a Powerful Growth Vision	Educates & Empowers Leadership in Maximizing the Future Technology Growth Potential
R&D & Innovation	Informs Robust Mid to Long Term Product Road-Mapping	Enables Technology Leverage to Drive Growth Opportunities	Sparks Innovation Culture Throughout Organization
Strategy	Enables Alignment of Technology Strategy with Growth Vision	Enables Team to Prioritize Technology Opportunities in the Growth Pipeline	Provides Companies to Action to Drive Growth Portfolio
Sales & Marketing	Clarifies Target Market Focus to Maximize Future Growth Potential	Enables Sales Force as a Value Differentiator	Creates a Continuous Flow of Brand and Demand Strategies
Corporate Development	Uncovers New Technology Business Investment Opportunities	Ensures Insight into Emerging Global Technology Growth Opportunities	Strengthens Portfolio Through Rigorous Technology & IP Analysis
Investors/ Finance	Inspires Confidence to Think and Act Long Term with a Technology Perspective	Feeds M&A Opportunities with Companies to Action	Enhances the KPI's of Growth Investments
Intelligence	Drives Metrics as the Foundation for the Growth Pipeline	Access to Sophisticated Tools & Techniques to Analyze Intelligence	Enables Tangible Contribution to New Technology Growth Opportunities



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Growth Diagnostic
and Benchmarks

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GROWTH DIAGNOSTIC AND BENCHMARKS



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GROWTH DIAGNOSTIC FOR EXECUTIVES



WHO

The C-suite and the CEO's growth team



WHAT

First level diagnosis of your relative strengths and weaknesses regarding core aspects of your corporate growth potential



WHY

Benchmark the best practices of the top 10% of companies that consistently achieve their growth potential

Ten best practice questions from 50 years of experience

- Perspectives on both Growth and Innovation in relation to your future growth potential
- Benchmark yourself against companies past and present
- Understand which part of the growth pipeline engine your company needs to focus on
- Develop a clear alignment with your colleagues

BONUS: As a Council member, you will also have an opportunity to meet with a Frost & Sullivan analyst to examine the results of the survey and hear their recommendations.



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BENCHMARK SURVEY FOR **MARKETERS**



WHO

B2B Marketing
Leadership



WHAT

A survey to help
you benchmark
your marketing
organization,
strategy and plans



WHY

Strategic insights as
to what's hot,
what's not, where
you stack up and
how your peers are
planning for
uncertainty

What's trending in the
digital and non-digital
landscape

- How are marketing departments measured and what's the average return in my industry
- What % of revenue is falling into the marketing budget for a company my size
- How many accounts should make up my ABM strategy
- What are my greatest lead conversion challenges and how do I overcome them

BONUS: As a Council member, you will also have an opportunity to meet with a Frost & Sullivan analyst to examine the results of the survey and hear their recommendations.



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BENCHMARK SURVEY FOR **CONTACT CENTERS**



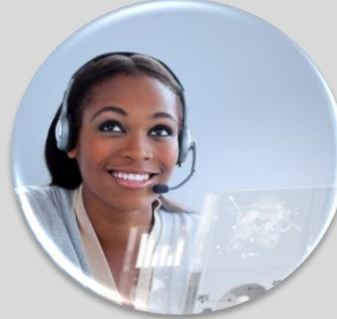
WHO

Customer
experience and
customer service
leaders



WHAT

A survey to help
you assess
customer
satisfaction and
performance



WHY

Spark change
within your contact
center and help
drive your
customer
experience strategy
decisions

Insight on how your contact center metrics compares to others, both within your industry and across industries and geographies

- Assessment of the range of valuable metrics the industry is leveraging, and how to determine which ones are right for your business and organization
- The metrics central in identifying, balancing, and improving both CX and EX

BONUS: As a Council member, you will also have an opportunity to meet with a Frost & Sullivan analyst to examine the results of the survey and hear their recommendations.



ASSOCIATE MEMBERSHIP



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TEAM BENEFITS

Designate UP TO FIVE business executives within your organization to join you as an associate member.



BENEFITS

Access to the Community: Members-Only Council Portal Credentials and Networking	✓
\$1,000 Savings* on Select Executive MindXchange Events	✓
Subscription to Bi-Weekly Council Communications	✓
Full Access to Virtual Events	✓
1 Group Call per Month with a Personal Concierge	✓

**May not be combined with other offers.*



TESTIMONIALS, BENEFITS SUMMARY & CONTACT INFORMATION



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TESTIMONIALS



The Growth Innovation Leadership Council has allowed me to get outside of my industry to hear how others in different industries innovate, go to market and sell their products and services. I've been able to apply many of their strategies or tactics to my own industry with success.



parexel.

The Growth Innovation Leadership Council's monthly calls are a great way to learn from others in innovation roles, across the spectrum of innovation maturity. The Council tends to meet in person just before key MindXchanges, which is another opportunity to network and learn from others.

Where else can someone from the Oil and Gas industry have a dialogue with thought leaders from Healthcare, Aerospace, Transportation, Technology, Finance, etc., to solve problems?



Baker Hughes



I'm using the Frost & Sullivan research to bring fresh perspectives into our department launch retreat....I'm very happy with the Growth Innovation Leadership Council resources and service.



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SOLUTIONS WHEN YOU NEED THEM



COUNCIL MEMBER BENEFITS

- ✓ Critical Issues Workshop Participation
- ✓ Critical Issues: Voting Rights
- ✓ Executive MindXchange Events
- ✓ Council Virtual Events
- ✓ Mega Trends Half Day Workshops
- ✓ Quarterly Experiential Networking Activities
- ✓ Live & Interactive Industry Workshops
- ✓ Innovation Tours
- ✓ Executive Coaching Clinics
- ✓ Full Portal Access
- ✓ Custom Portal Profile
- ✓ Frost & Sullivan Research
- ✓ Interactive Analyst Deep Dive Analysis
- ✓ Full Growth Diagnostic Evaluation and Recommendations
- ✓ Transferable & Includes Five Associate Members
- ✓ Full Concierge Service




CONTACT INFORMATION



Thank You

FROST & SULLIVAN
The Growth Pipeline Company

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