McKinsey&Company

Digitizing Our Firm

Insights anytime, anywhere | ClientLink

Colleagues,

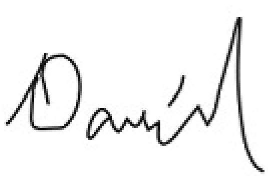
Welcome to the latest edition of the ClientLink Newsletter.

In this issue we highlight the new ClientLink personal knowledge dissemination tool for Partners and APs, ClientLink SmartShare. We also share a case study of an innovative implementation of ClientLink for Cells by the Wave Service line. And we offer an overview of the Industrial Strength Who Knows Who Service Line leveraging the ClientLink Central Contact Database.

It is an exciting time for the ClientLink family. ClientLink SmartShare has been rolled out to early adopters over the Summer, and will be rolled out to all Partners and APs in the Fall. And through mid-year, external campaigns leveraging ClientLink for Cells are up nearly 100% over the same period last year. The takeaway is clear: The Firm is upping our game in external thought leadership through knowledge dissemination.

Over the Fall, 2017, we will be making it easier to use ClientLink. We will be launching a new internal website featuring our products, capabilities and best practices. And we will be launching a webcast series designed to help Cells get the best out of ClientLink.

As always, we look to you, the ClientLink user base to offer feedback and suggestions. Please feel free to reach out to me or to any of the ClientLink Regional Specialists.



David Cheifetz
Director, Global CRM Initiative

"ClientLink Talks" webex sessions are now available

Interested in what ClientLink has to offer but not sure how to leverage its robust capabilities?

Do you want to raise your game by leveraging best practices in managing your database of external contacts and/or sending knowledge campaigns or event invitations?

Attend one of our upcoming "ClientLink Talks" webex sessions to hear how Practices are currently leveraging ClientLink to exceed their R&R goals and hear some of their tips-n-tricks on how to best utilize the tool.

Overview of ClientLink SmartShare , The New Personal Knowledge Dissemination Tool For Partners and APs

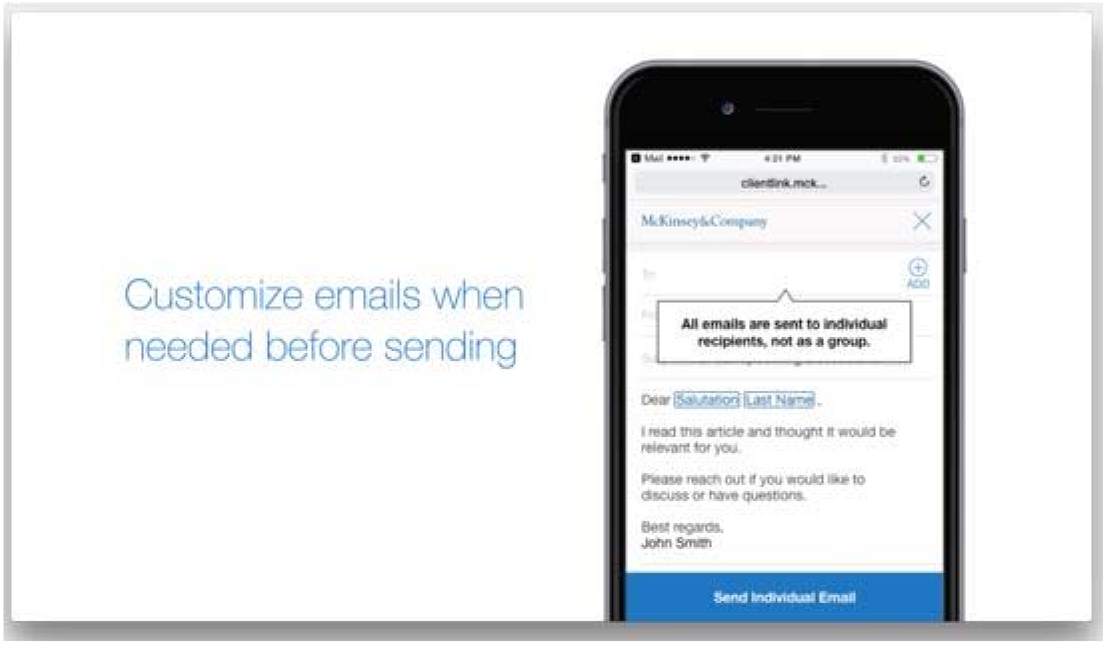
Interview with Jeremy Jonas, Senior Product Manager for T&D Knowledge and Internal Engagement, based in the Montreal Office.

CL team: Jeremy, tell us about SmartShare, the new knowledge-sharing platform that is debuting this fall.

JJ: To start, I'd like to emphasize that this a completely new tool, because it has been designed from the ground up, with great care and attention to the smallest of details. For example, it is exceptionally light, simple, fast and intuitive. It was designed as a mobile-first product, with no onboarding process or training required of users. The goal is to give Partners a tool for sharing knowledge with their key contacts, say, in the taxi between meetings, or on the way to the airport. In other words, it works "in the flow" of a Partner's busy day.

CL team: And what specific things will SmartShare do?

JJ: SmartShare will appear as an app in the McKinsey app store, and it will also take the form of a personalized email newsletter sent once a week, updating the Partner on recently published articles from that Partner's Practices, as well as the best of MGI, McKinsey.com, and the McKinsey Quarterly. You can read the articles on your device, and with a few quick taps, you can email any of those articles to anyone in your contact list.



CL team: So, the SmartShare product is built around email?

JJ: Yes, because email is the tool Partners are most comfortable with. When you dig down into the struggles associated with knowledge-sharing, you'll see it's not the "sending" that trips Partners up; it's "finding" the relevant content in the first place. SmartShare was designed to address that pain point, in an easy-to-use way. We have also added 'Group' sharing where you can create and save groups for future use, making it very fast and easy now to share with multiple recipients. You could make a group for CFOs and another for CMOs. You might have a list of twenty different people with different titles but they are all interested digital topics, so SmartShare will allow you to create a Digital Interest Group, or whatever helps you accelerate sharing.

CL team: Some McKinsey cells publish often, and some publish a trickle of pieces in a year. How will that impact what Partner's see in SmartShare?

JJ: We have several streams of material that feed into SmartShare, from a Partner's relevant mix of work. So while Functional Practices tend to publish more content, and Industry Practices publish less frequently, the overall mix will feature the latest articles from your main Practices, as well as a sprinkling of cross-cutting topics that might not be from your Practices exactly, but something potentially relevant for your contacts. The last stream includes evergreen classics, articles with value and relevance that you may have heard of or maybe read a while back but are still pertinent. Taken together, these streams should make for a compelling collection, which is updated weekly, to encourage regular knowledge sharing.

CL team: And what functionality will the app allow in the future?

JJ: Today, the tools offer seamless integration with your contacts. However, we are working on the ability to create customized lists of contacts, and to email a list with one tap. We've had great response from Partners about 'Your Contacts Are Reading'. You'll see when a contact reads an article that you have shared through SmartShare. It's curiously exhilarating when that feedback loop is completed. It's probably the most exciting and valuable new feature of SmartShare.

CL team: What is the strategic goal that SmartShare is aiming to hit?

JJ: We know from research that most Partners don't have knowledge sharing built into their weekly workflow. SmartShare is a mobile product, making it easy to use a moment or two to review fresh knowledge in your sectors, and share it with a few quick taps. If we can expand the pool of Partners who share articles once a week or more, we will have fulfilled our aim.

CL team: Thank you for taking us through it, Jeremy!

Wave and ClientLink

Mitzi Cohen on Wave and how it leverages ClientLink to build its brand

Wave, part of the New Ventures portfolio, combines an intuitive, web-based program management platform with expert services to help organizations drive sustainable impact in their transformation programs. The platform is designed to easily integrate activity tracking with impact measurement, while also handling distributed participants, and accommodating frequent reporting needs.

The use case for Wave ranges from complex mergers to corporate turnarounds, as well as procurement savings efforts, and continuous improvement programs in the areas of R&D and innovation, just to name a few. The tool, which measures impact over time, allows management to see, for example, which departments or initiative owners are underperforming or what might be causing delays in implementation. As a result, Wave quickly becomes the one source of truth for driving sustained impact within an organization. "Wave has changed the nature of what we do by making things clear, transparent, and accessible in our program management," said the director of finance for a large healthcare company.

To date, Wave has more than 76,000 users and has served 480+ clients across 44 countries. In total, this represents a total of $82 billion U.S. dollars of impact being managed by the tool. And integration with ClientLink, and its suite of communication tools, was a great growth driver, helping the Wave team build awareness and generate demand for its platform and services.

Mitzi Cohen, the Marketing Manager for Wave, said, “I find the ClientLink team has always been there to help us. The metrics and campaigns that they provide us, and all of the reporting has been top-notch. They have helped us A/B test different campaigns, helped us optimize our content for mobile, and counseled us on writing great headlines that really resonate with our clients.”

From release feature communications to clients, to optimizing campaigns designed to drive user adoption of Wave, to helping qualify our existing contact database, or simply helping us come up with fun and effective one-to-one client-nurturing campaigns, Cohen said, “ClientLink has been a thought partner every step of the way.”

Industrial Strength Who Knows Who Service Line

Dipanshi Sood on the Industrial Who Knows Who analytic capability built upon the ClientLink Central Contact Database

“We’ve got about one million contacts in the ClientLink database,” Dipanshi Sood, the

Senior CRM Analyst in charge of this service line told me. She was taking me through the types of reports that make up the Industrial Strength Who Knows Who Service Line. Who Knows Who allows Partners or Cells to sift the massive ClientLink Central Contact Database (CLDB) to know who in the Firm has a relationship with executives at a certain company or what sort of penetration the Firm has in a certain industry or functional sector.

There are business rules in place, such as our traditional “Partner as Gatekeeper” approach, so the service line will not provide a readout of another Partner’s contact list, for example. But for useful, productive searches with business potential, such as industry coverage or relationships with professors at certain universities, the ClientLink Data Management team is happy to help.

Sood walked me through the four main use cases for Industrial Strength Who Knows Who, and discussed the capabilities that are not in place yet, but are in development and will appear over the next year.

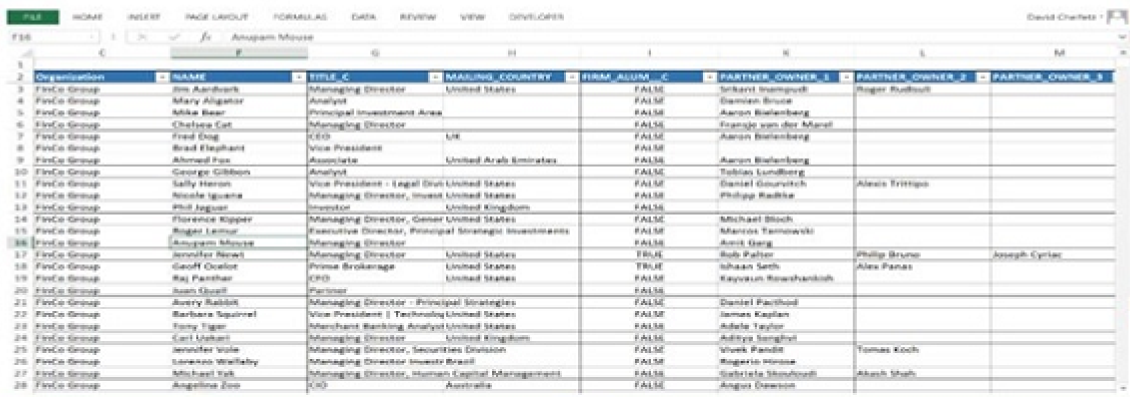
“The first use case is Practices using the reports to keep tabs on their contacts in a given region, or across specific geographies,” Sood said, noting her team has worked with a wide range of Practices and Offices over the last year-and-a-half.

“The second use case is CSTs coming to us to see what sort of penetration the Firm has across a specific industry or sector,” she said. “Others come to see what contacts we have at a specific academic institutions, such as our penetration across North American graduate programs in business administration.”

The third use case involves helping planners of McKinsey events, around the world, to help book speakers and make introductions for partnerships and such. “A typical request of this type might present a list of 500 people they want to invite to the event, and we can run a report to see who knows them in the Firm,” Sood said.

The fourth use case is to do COM analysis, for Reach & Relevance purposes. “The Firm has a Client Opportunity Map, and teams will come to us to do the analysis to see which people in the Firm have relationships with people at those organizations,” she said. Also, R&R leaders for a given sector might be interested in who has reached out to contacts at a certain government agency or public-sector organization, and how many times. The end product in this case is a very granular report on which articles and publications have been sent to which contacts, and who is doing the sending.

Sanitized "Who Knows Who" analysis for large Financial Services CST – July, 2017



	Organization	NAME	TITLE_C	MAILING_COUNTRY	FIRM_ALUM__C	PARTNER_OWNER_1	PARTNER_OWNER_2	PARTNER_OWNER_3
3	FinCo Group	Jim Aardvark	Managing Director	United States	FALSE	Srikant Inampudi	Roger Rudisuli	
4	FinCo Group	Mary Alligator	Analyst		FALSE	Damien Bruce		
5	FinCo Group	Mike Bear	Principal Investment Area		FALSE	Aaron Bielenberg		
6	FinCo Group	Chelsea Cat	Managing Director		FALSE	Fransjo van der Marel		
7	FinCo Group	Fred Dog	CEO	UK	FALSE	Aaron Bielenberg		
8	FinCo Group	Brad Elephant	Vice President		FALSE			
9	FinCo Group	Ahmed Fox	Associate	United Arab Emirates	FALSE	Aaron Bielenberg		
10	FinCo Group	George Gibbon	Analyst		FALSE	Tobias Lundberg		
11	FinCo Group	Sally Heron	Vice President - Legal Divi	United States	FALSE	Daniel Gourvitch	Alexis Trittipo	
12	FinCo Group	Nicole Iguana	Managing Director, Invest	United States	FALSE	Philipp Radtke		
13	FinCo Group	Phil Jaguar	Investor	United Kingdom	FALSE			
14	FinCo Group	Florence Kipper	Managing Director, Gener	United States	FALSE	Michael Bloch		
15	FinCo Group	Roger Lemur	Executive Director, Principal Strategic Investments		FALSE	Marcos Tarnowski		
16	FinCo Group	Anupam Mouse	Managing Director		FALSE	Amit Garg		
17	FinCo Group	Jennifer Newt	Managing Director	United States	TRUE	Bob Palter	Philip Bruno	Joseph Cyriac
18	FinCo Group	Geoff Ocelot	Prime Brokerage	United States	TRUE	Ishaan Seth	Alex Panas	
19	FinCo Group	Raj Panther	CFO	United States	FALSE	Kayvaun Rowshankish		
20	FinCo Group	Juan Quail	Partner		FALSE			
21	FinCo Group	Avery Rabbit	Managing Director - Principal Strategies		FALSE	Daniel Pacthod		
22	FinCo Group	Barbara Squirrel	Vice President | Technolog	United States	FALSE	James Kaplan		
23	FinCo Group	Tony Tiger	Merchant Banking Analyst	United States	FALSE	Adele Taylor		
24	FinCo Group	Carl Uakari	Managing Director	United Kingdom	FALSE	Aditya Sanghvi		
25	FinCo Group	Jennifer Vole	Managing Director, Securities Division		FALSE	Vivek Pandit	Tomas Koch	
26	FinCo Group	Lorenzo Wallaby	Managing Director Investr	Brazil	FALSE	Rogerio Hirose		
27	FinCo Group	Michael Yak	Managing Director, Human Capital Management		FALSE	Gabriela Skoufoudi	Akash Shah	
28	FinCo Group	Angelina Zoo	CIO	Australia	FALSE	Angus Dawson		

'Who Knows Whom' report provides

- ✓ Most recent business coordinates
- ✓ List of all relationship holders
- ✓ Other information like COM Indicator, Firm Alum, Region, Country, Industry, Sub-Industry

'Who Knows Whom' report does not provide

- ✗ Any contact touchpoint information like email addresses, phone numbers, physical addresses
- ✗ Complete downloads of Partners' address book

Sood also explained that a great deal of effort goes into scrubbing the data and making sure that information from CSS' contacts in their smartphones are being combined with material from third-party data vendors, to ensure we have a robust set of contacts, across all industries and functions.

After listing the four main use cases, Sood mentioned one other way the Industrial Strength Who Knows Who Service Line can be helpful: Cells sometimes lose touch with companies as Partners retire or take jobs outside the Firm. Now it is possible to look for executives in the contact database who have no contacts with current Firm members. Practices can then use this to assign coverage for these executives, for clientele redevelopment. In all, it is an incredible resource for Partners, CSTs and Practice Managers, but it is not limited to those groups.

Want to get started with a search of your own? Contact Dipanshi Sood or the ClientLink Data Team

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Meet the team

David Cheifetz
Director, Global CRM Initiative

Frank Lenhardt
CRM Manager (Western Europe)

Serena Leogue
Interim CRM Manager (Americas)

Lyubov Luchinskaya
CRM Technology Specialist (Eastern Europe)

Radhika Goel
CRM Manager (Middle East, Africa, Functional Practices)

Achira H Doshi
CRM Service Line Leader (Asia Pacific)

Contact / Feedback: Julie Crum