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Digitizing Our Firm

Insights anytime, anywhere | ClientLink

Colleagues,

Welcome to the latest edition of the ClientLink Newsletter. In this note, I want to briefly review the achievements of ClientLink in 2016, highlight one of the emerging best practices for Cells creating mailing lists of Clients/ele, and offer a sneak preview of a new offering coming in 2017.

2016 was a banner year for ClientLink For Cells (CL4C), our targeted mass mailing service. Serving more than seventy Firm Cells and publications, we facilitated 304 external mail/e-mail campaigns, for a total of 374,000 mails/e-mails sent. Additionally, CL4C was also used for 148 internal e-mail campaigns.

We also saw strong growth in the ClientLink Central Contact Database (CLDB). This database houses one of the Firm's core assets, our client network. The database now contains 470,000 Public (curated) external contacts, the product of contacts from 50% of Partners and APs in the Firm and also includes information regarding key Firm publications, Cell databases, and most recently all CER client contact data. External contacts are managed across the database, cleansed, updated, and mapped along their multiple touchpoints in the Firm. We are on track to onboard the contacts of all Partners and APs across the Firm over the coming year in collaboration with Offices and Practices.

We are often asked by Cells: What is the best way to build a priority contact database for our Cells for the purpose of knowledge dissemination and events management? Over time, we have developed a best practice methodology based on our experience with both CL4C and the CLDB. We recommend the following four step approach:

Step One: Ensure that all affiliated Partner's and AP's have their contacts synched from their Notes/Outlook address books into ClientLink. Then execute an “Industrial Strength Who-Knows-Who” query across.

Step Two: Based on the list created by the “Industrial Strength Who-KnowsWho” query, identify the list of contacts you would like to use as the basis for your Cell list. You will need to get the permission of the affiliated Partner/ APs to include their contacts in your Cell list.

Step Three: Based on the findings of your query, you will have a clear picture of “who we know” in your space, and also have an idea of “who we do not know”, either in terms of companies or specific contacts. This should inform the targeted research that your Cell will subsequently do to supplement your list. There are many other sources that can support your research, including the ClientLink Team, R&I, third party data aggregators, and external Firms.

Step Four: Once your Cell has its contact list established in ClientLink, you can add, update, and delete contacts. Likewise, the ClientLink team will also work with you as our systems detect executive movements from one of our external information sources or when there are e-mail bounce backs (typically a sign that someone is no longer in role), etc. So the database will continue to grow and evolve.

One last point: Cell's can now use the Client Opportunity Map (COM list) to provide a full view of your Cell's R & R footprint. The aggregated view of client companies and client contacts can then be used to perform an analysis of your Cell’s reach. This is a new capability developed recently by our Data Team.

Finally, I want to share with you a preview of a new offering coming from the Global ClientLink Initiative in mid-2017.

There are currently about 600 Partners and APs who have access to the existing ClientLink For Partners (CL4P), a tool designed to help individual Partners and APs share knowledge with their clients anywhere, anytime. We have learned valuable lessons from the first generation of the CL4P tool, and are currently developing the Next Generation ClientLink For Partners. The new CL4P interface is being redesigned from the ground up to optimize around user experience and performance (speed). The offering is being built around a “Mobile First” experience, and is architected to perform on 4G/ LTE and 3G networks, given the variability of mobile bandwidth around the world.

The initial release of the Next Generation ClientLink For Partners is scheduled for Summer, 2017. Stay tuned for more information to come…

As always, please feel free to reach out to me or others from the Global ClientLink Initiative team with questions, comments or suggestions.

David

David Cheifetz
Director, Global CRM Initiative

Interview with Fatema Nulwala, External Communications Specialist, INO

“To sum it up, it’s "a one stop shop" for effective, periodic and systematic mailing of information!”

Read Full Interview

Update on ClientLink for Cells

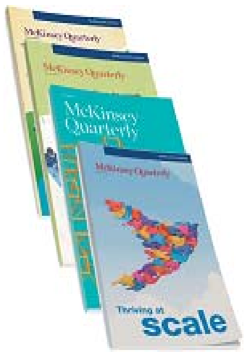
Since the launch of ClientLink for Cells back in 2015, we have continuously worked on improving the application and enhancing the overall user experience.

A good portion of this development was made "under the hood" and not visible to the end user. Nonetheless, these improvements have contributed to a more stable system, improved workflow's and faster processing times. Some of these improvements include, but are not limited too:

- Increased upload speeds due to a new architecture for Cell Specific Values
- A better mailing experience which includes the ability to attach an .ics file, allowing the creation of calendar invites in all major email applications such as Outlook, Gmail, LotusNotes and iOS
- Streamlined reporting consolidating McKinsey R&R relevant information by building custom report types, ultimately making it quicker - and easier - to access only the information you need.

http://clientlink.mckinsey.com, from the top navigation bar navigate to the "Non-practice contacts" tab and try searching for a name, a title, or a company. Your query will return matching contacts along with the names of the Firm colleagues who have a relationship with them.

If you have a suggestion for improvements or an idea for a new feature, please reach out to Frank Lenhardt



We are pleased to announce the new Firm Publications Subscription Portal

We are pleased to share with you the link to the new Firm Publications Subscription Portal.

http://clientlink.force.com/Subscriptions

This Portal has replaced the now-retired MCD, and can be used to subscribe your clients/ele to the major publications of the Firm: McKinsey Quarterly, MGI reports, McKinsey on Business Technology, McKinsey on Finance, McKinsey on Investing, and McKinsey on Payments. It provides you all of the tools needed to keep your subscriptons up to date:

- Access and review the latest list of your subscribed contacts - online and at any time!
- Directly edit contact details and subscriptions
- Subscribe additional contacts to the major McKinsey Publications
- EAs can log in and manage subscriptions on behalf of their Partners/ APs

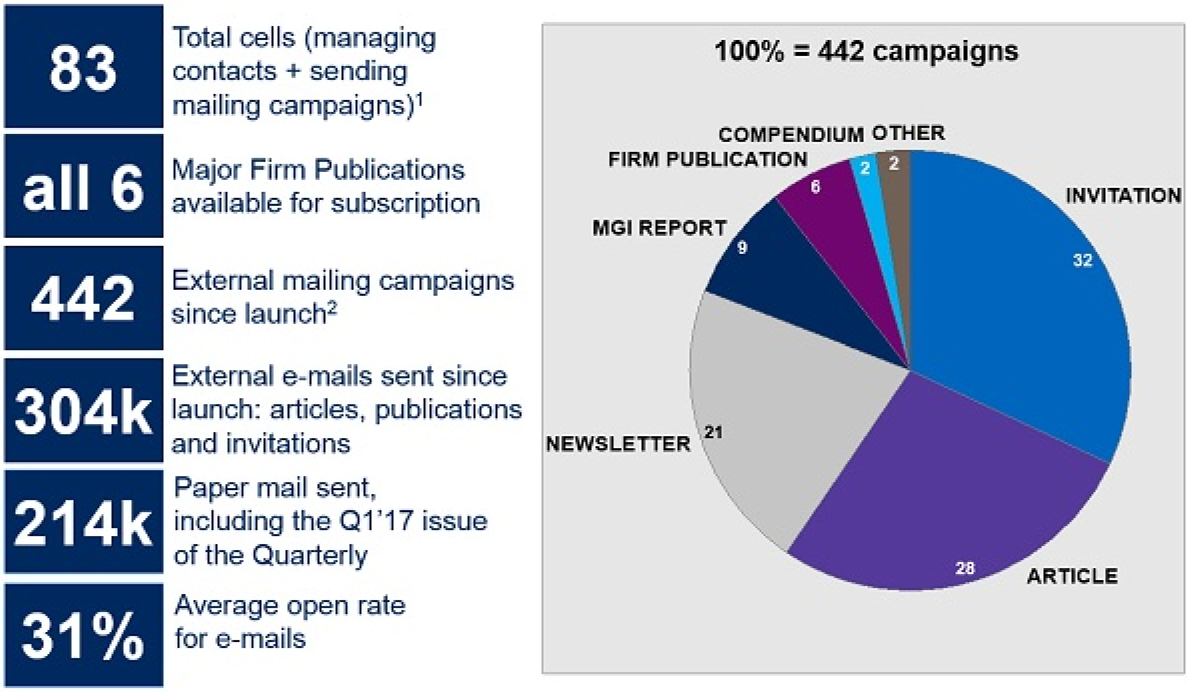
Please find a of how to use the Portal attached. If you have any further questions, do not hesitate to reach out to us, or email to ClientLink_Publications@mckinsey.com

The Firm Publications Subscription Portal ties directly into the ClientLink Central Contact Database, which is being built as the central Firm database of external contacts. Contacts are mapped by a dedicated data analytics team to the personal contacts they have in the Firm (e.g., Partner and AP relationships), the Cell distribution lists they are a part of (e.g., Practice and Office mailing lists), and the major Firm publications to which they are subscribed.

In addition to the direct link above, you can find the a link to the Firm Publications Subscriptions Portal on the Intranet home page and on the Client Development page of the Intranet.

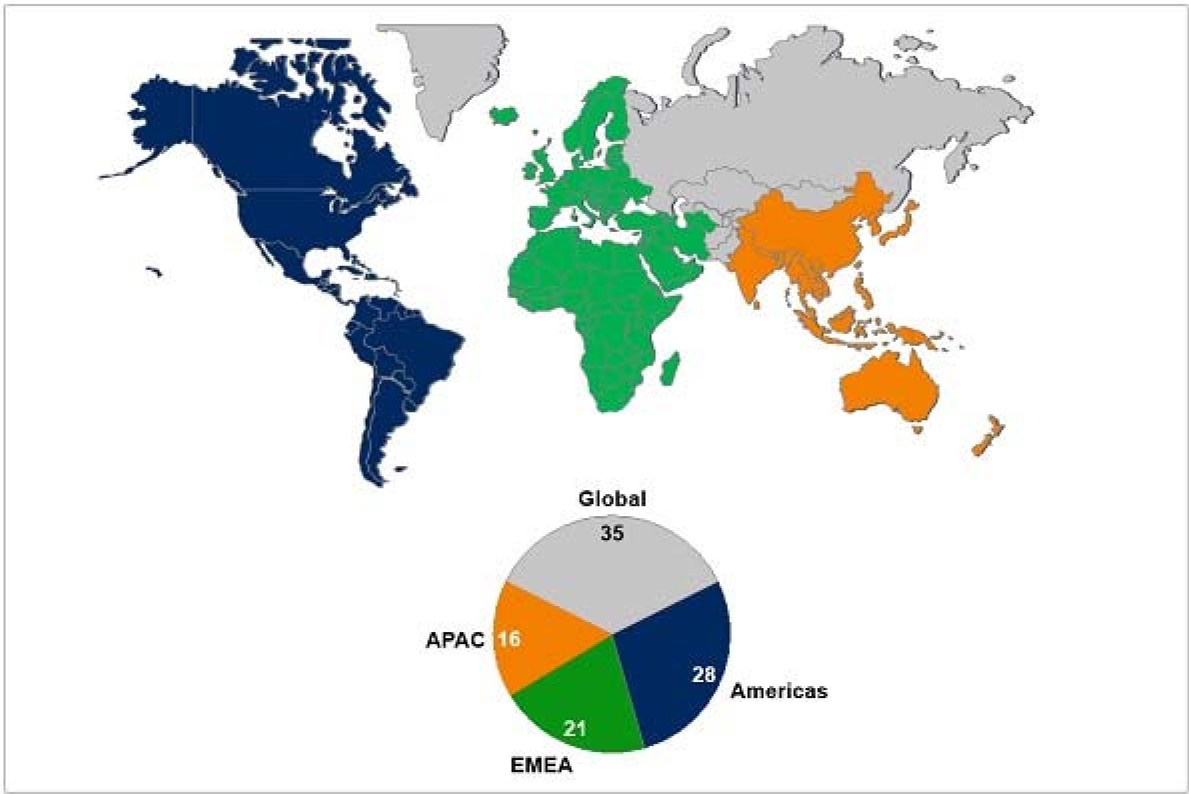
ClientLink for Cells – Enabling R&R outreach for cells

Activity and impact since launch in July, 2015 through March, 2017



1 We are supporting additional 20 cells for sending Internal newsletters
2 Internal e-mail campaign are not included; they account for an additional 241 campaigns, daily issue of recommended reading and overall 403K internal emails sent

Percentage of campaigns executed by region from ClientLink



Meet the team

David Cheifetz
Director, Global CRM Initiative

Frank Lenhardt
CRM Manager (Western Europe)

Dorothy Roca
CRM Expert (Americas)

Lyubov Luchinskaya
CRM Technology Specialist (Eastern Europe)

Radhika Goel
CRM Operations Specialist (Middle East, Africa, Functional Practices)

Achira H Doshi
CRM Service Line Leader (Asia Pacific)
