

Share with Care: Mastering Compliance in Data Handling

Practical guidelines for protecting sensitive project information

SIMON
KUCHER
Unlocking better growth



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Knowledge shared is Power unlocked!

**Here are the essential
guidelines & tips to master
knowledge sharing in your
everyday work –
fast, smart and safely!**

**COMPANY-WIDE KNOWLEDGE SHARING
IS ABSOLUTELY **ESSENTIAL FOR** Simon-Kucher.**

It **fuels business development, boosts acquisition** and **strengthens project work**. It **accelerates innovation across sectors and markets** – big time.

To make this happen, we are on the verge of rolling out new technologies and processes that help us share more, faster and better than ever before.

At the same time, we play by the rules:
CONFIDENTIALITY MATTERS!

Sanitization matters for Compliance!

Sanitization is not just a best practice – it's a necessity!

REGULATORY ALIGNMENT

Data sanitization is a key element to meet industry and legal requirements, e.g. GDPR

CONFIDENTIALITY & SECURITY

Prevents exposure of sensitive client or internal data

RISK MITIGATION

Reduces liability and reputational risks from data leaks

REUSABILITY & EFFICIENCY

Enables safe sharing of insights without compromising compliance

*Project
team only?*

*Share
freely!*

*Wider
audience?*

*Sanitize
first!!!*

DATA MATTERS

Protecting SK
& Client data



RESPECT CONFIDENTIALITY OBLIGATIONS:

Simon-Kucher always operates in line with the principle that **information is only shared with anybody who has an OBJECTIVE NEED TO KNOW**. This follows from our **Confidentiality Policy** and the contractual obligations we are under with our clients. Therefore, **project information cannot be shared outside of the project team, unless it has been sanitized**, aggregated and/or pseudonymized based on the guidance given in this guideline and our applicable compliance policies, standards and procedures.

ABIDE BY APPLICABLE LAWS:

Laws and regulations applicable to Simon-Kucher define guardrails for the sharing of commercially sensitive data, which is generally not permitted. We detail out these obligations in our Global Compliance Policies and trainings.

RESPECT DATA PRIVACY:

Adhering to the rigorous standards set by the various global data privacy regimes applicable to Simon-Kucher is essential not only for compliance but also **to maintain the trust our clients** place in us regarding their business secrets and (personal) data.

Special care and attention are required with the adoption of new technologies, such as Artificial Intelligence (AI), as compliant and responsible data usage will enable us to harness the vast potential these technologies offer.

[CLICK HERE](#) to learn more about Simon-Kucher's approach to corporate and information compliance. For any advice on handling client data contact **datamatters@simon-kucher.com**.

Your responsibilities: Share insights without sharing risks!



KEEP IT TARGETED

- ✓ Ensure that project documents are only shared with the intended recipients

01100
10110
11110

PROTECT PROJECT DATA

- ✓ Unsanitized documents **must** remain within the project team



SANITIZE BEFORE YOU SHARE

- ✓ Before sharing beyond your team, ensure proper sanitization. Sanitizing a proposal takes **less than 5 minutes**.



GET THE GREEN-LIGHT

- ✓ Always obtain lead partner approval before sharing a document beyond your project boundaries for the first time



WHEN IN DOUBT, REACH OUT

- ✓ Any questions on how to handle project data?
Reach out to datamatters@simon-kucher.com or your lead partner



SHARE WITH CARE: What to remove from project documents



1 NAMES & CONTACTS STRIP THE IDENTIFIERS! Remove names logos, emails, phone numbers – anything that reveals identities	2 CLIENT SPECIFIC TERMS KEEP IT NEUTRAL! Take out acronyms, internal terms and unique taxonomies that aren't general business concepts	3 (HIDDEN) CONNECTIONS UNLINK THE ENTITIES! Replace all names of subsidiaries, parent companies, partner firms, vendors and suppliers – also those not obviously linked to the client
4 MARKET CONTEXT ERASE MARKET FOOTPRINTS Disguise all non-public references revealing a client's market context, e.g. market position, competitive landscape, and any implicit or explicit geographical identifiers, such as local currency Market insights based on SK research? Check sources for public availability before sharing!	5 NON-PUBLIC INSIGHTS LOCK IT DOWN! Eliminate all non-public hints to commercial strategies, cost structures, production capacities, output volumes etc. Purchased data? Check license before sharing!	6 VISUALS & GRAPHICS WATCH WHAT YOU SHOW! Ensure no client-specific charts, hidden identifiers or specific designs & layouts remain

About this **sanitization guide**



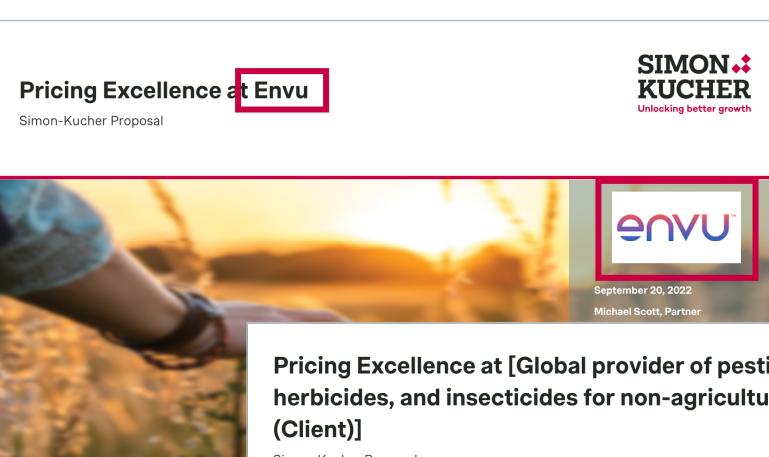
What this guide helps you do

- ✓ Understand the guiding principle: **Share data freely within your project boundaries. When sharing beyond your team, sanitize!**
- ✓ Ensure that you do not share confidential, commercially sensitive, or otherwise protected information or content
- ✓ Guide you on how to sanitize your project documents before sharing based on data privacy rules and data protection policies

What this guide doesn't do

- ✗ Cover every single type of project document, client or scenario, as every project is unique
- ✗ Apply to any external documents or sharing of any documents outside of Simon-Kucher
- ✗ Replace any laws or company compliance rules and regulations. When in doubt, consult our **Global Data Privacy Policy**, **Global Confidentiality policy**, contact your Partner or the legal & compliance team

Protect identities: Turn real names into safe data (1/2)



Make sure the client logo is removed from the entire document (apart from general market overview slides).

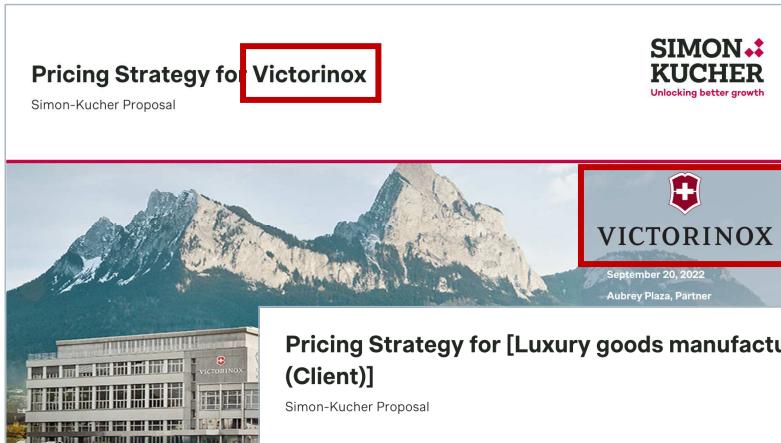


Find an appropriate placeholder for the client name.

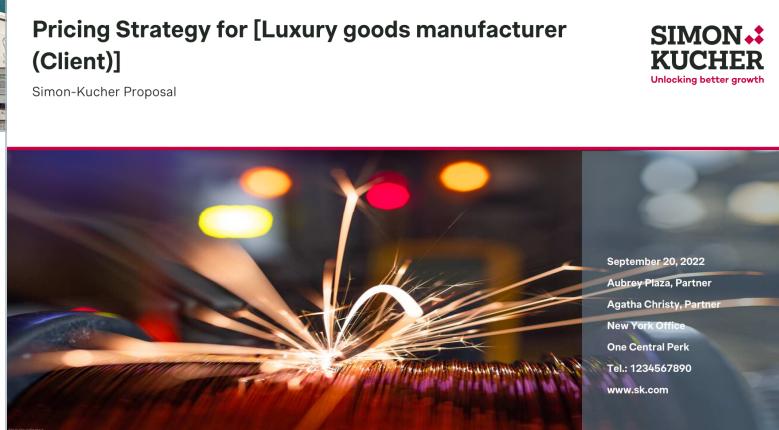
BEST APPROACH ON CLIENT NAME PLACEHOLDER:

- Get familiar with the client and project context first
- Appropriate client placeholder can be sometimes found within the document (usually in the client situation section), but you can also try Google search to find out more about the company
- If you are unsure about which placeholder to use, add one and you can come back to it afterwards
- On the title slide it's good to use the full placeholder and add (Client) behind, e.g., [Large European OEM (Client)] and use the short version [Client] in the text afterwards

Protect identities: Turn real names into safe data (2/2)



When replacing client name try to create a placeholder that is as descriptive as possible without giving away the actual client.



Using a [Leading Swiss army knife manufacturer] would be client-revealing. Try using a more general placeholder, e.g., [Luxury goods manufacturer].

1 Client name - Example



Client name alert: Always check document names, section names, sources & footers!

The screenshot shows a Microsoft Word document window. The title bar indicates the file is named "OH-123DE45678_CGR_Bacardi_Pricing optimization_Simon-Kucher_Proposal_2111...". The main content of the slide is titled "Pricing optimization at Bacardi" and includes the Simon-Kucher logo. The left sidebar shows a list of six slides, with the first slide visible.

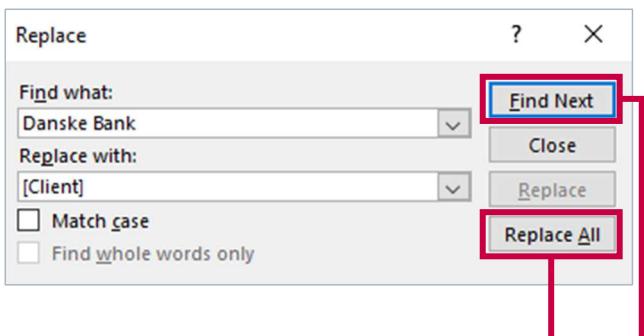
Apart from obvious identifiers like client name, logo or branding, remember to sanitize the document's name. Remove project code, replace company's name with a suitable placeholder.

After you finish working with the document, add “SAN” or “SANITIZED” at the beginning of its name, so it’s immediately known that the document is ready and safe to use.

SAN-Proposal-Pricing optimization for a spirits company-20201217.

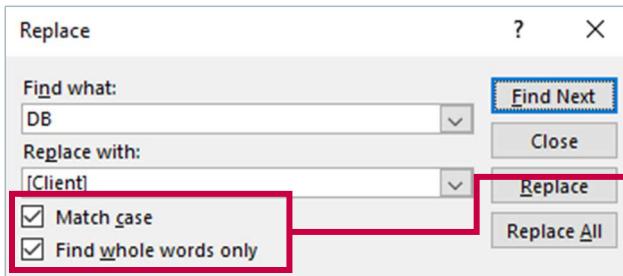
Find it. Replace it. Secure it. Master Search & Replace like a pro! (1/2)

TO USE THE SEARCH AND REPLACE FUNCTION PRESS **CTRL + H**



There might be more variants of the client's name, so it's best to replace the longest ones first and the acronyms at the end, e.g., "Danske Bank A/S" → "Danske Bank" → "DB".

You can do changes one by one by clicking "Find Next" and "Replace" or "Replace All" to do all possible changes within the deck at once.



To avoid replacing the unnecessary words, tick the "Match case" option to find the exact same term including capital and small letters. The "Find whole words" option helps you replace standalone terms only and not parts of those terms.

Our understanding of your situation and project goals

- [Client] is in the process of introducing a new, 3rd party investment portfolio management solution, which will support customer advisors enhancing their advisory capabilities and to offer more advisory solutions to customers
- As 3rd party investment portfolio management solutions can include many different use cases, Danske Bank wants to define the optimal solution given [Client]'s needs and how to best commercialize and monetize the application for the future

Watch out for typos as search and replace function won't replace names that are not exact same match, e.g., "Dankse Bank" instead of "Danske Bank".

Find it. Replace it. Secure it. Master Search & Replace like a pro! (2/2)

ALWAYS DOUBLE CHECK THE RESULTS AFTER USING THE SEARCH AND REPLACE FUNCTION

3i	Carlsberg	EQT
ABB	Citygate	Ericsson
Aerocrine	CMORE	Espressohouse
Ahlstrom	Coloplast	Fagerhult
Alfa Laval	Copenhagen MalmöFerring	
Alk Abelló	Port	Finder Fonecta
Alpha Helix	Cramo Adapteo	Findexa
Altus	Cubility	Fingerprints
Ambu	DAB	Fiskars
Andritz	Danfoss	Flugger
Arjo Huntleigh	Danisco	Fourphase
Arla	De Gruyter Siedle	FSN
Assa Abloy	DFDS	Gambro
Astra Zeneca	DT Group	Geobea
Ax Flow	Duni	Getinge
Axcel	Duo Cort	Glaston
Axis	Easypark	Gram
Ballingslöv	Ecco	Helsing
bambora	EDSA Förlag	HEME
Bang & Olufsen	EET	Hilding
Benify	EG	Hoyer
Billund Airport	Elajo	Huhtamaki
Bluegarden	Electrolux	Hydro
Bonnier	Ellos	Ingenico
Britax	Eniro	Ipsat Therapies
Brüel & Kjær Vibro	Enviro	JKE
Cargotec	Envirotainer	Kone

Replacing client with CTRL + H
would be client-revealing here
as only client is missing from the
list (especially in the regional
context and when companies
are listed in alphabetical order).

Retail Investments

- Betterment
- Bevestor
- BISON
- BNP Paribas
- Citi
- Comdirect
- Commerzbank
- Consorsbank
- Deutsche Bank
- Erste Bank
- HSBC
- ING
- Interactive investor
- J.P. Morgan
- maxblue
- NatWest
- Nordea
- Nykredit
- RBC
- Santander
- Saxo Bank
- S Broker
- SEB
- Société Générale
- Standard Chartered
- Swe[Client]ank



When using search and replace
function watch out to not
replace general terms or other
clients' names as this might be
client-revealing (e.g., replacing
“DB” with “[Client]” would give a
“Swe[Client]ank” result).

Logo is No-Go! Remove it right.

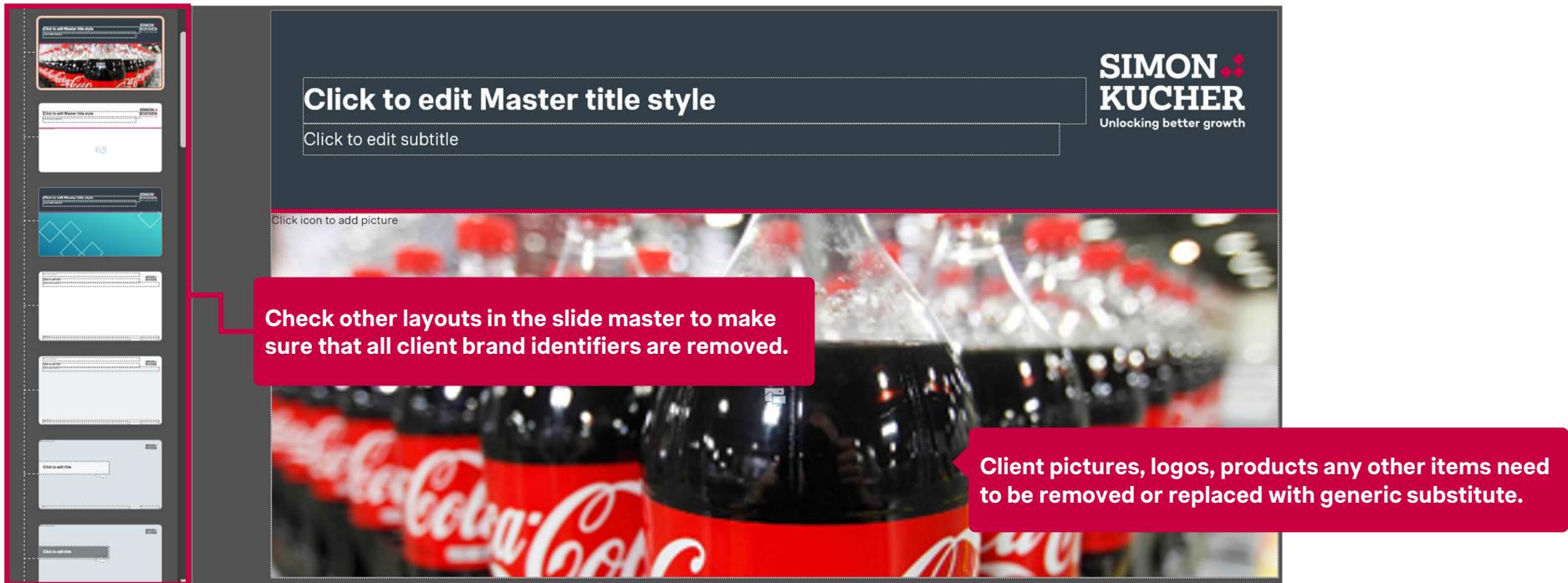
The slide features a title 'Marketing Success Measurement' in large blue font, a subtitle 'Final Report-out 5th December', and a footer 'Simon-Kucher & Partners'. A red box highlights the 'Allianz Global Investors' logo in the bottom right corner of the slide content area.

Pictures from the client need to be removed or replaced with licensed pictures from WeShare.

Remove client's brand identifiers like logos, catchphrases, values or colors, ensuring that the same changes are made in layouts within the slide master.

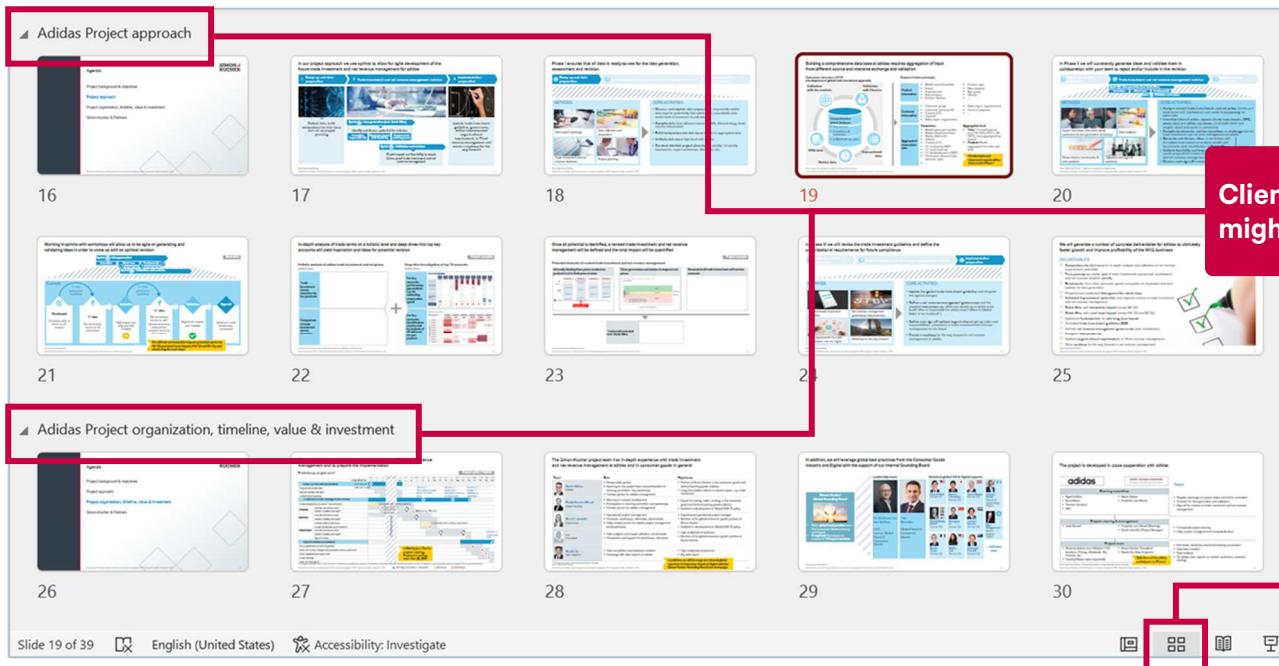
One more check: Select View to scrub slide masters!

TO ACCESS SLIDE MASTER, SELECT **VIEW** → **SLIDE MASTER**



One more check: Select View to clean section names!

TO ACCESS SLIDE SORTER VIEW, SELECT **VIEW** → **SLIDE SORTER**



Client could appear in the section names, and that might not be visible at a first glance.

Use the slide sorter view to quickly review section names.

One more check: Select View to examine presentation notes!

TO ACCESS NOTES, SELECT **VIEW → NOTES PAGE**



Point of Departure

Envi has an opportunity to improve profitability and protect margin through focused pricing actions and commission / incentive optimization

- Envi, formerly Bayer Environmental Sciences, is a leading global provider (total industry share of 12.1%) of pesticides, herbicides, and insecticides for non-agricultural use cases
- 4 innovation hubs underpin an asset-light, formulation technology and solution development business model which generated \$752M in revenue from sales to >100 countries with 27.8% EBITDA margin
- Envi maintains a leadership position¹ across the verticals it serves:

Turf & Ornamentals (T&O)	Vector Control (VC)	Forestry (F)
Professional Pest Management (PPM)	Specialty Actives (SpA)	Range & Pasture (R&P)
Vegetation Management (VM)		

We understand there is a pricing opportunity based on:

- Significant inflation, energy and raw materials / All costs increases
- Non-agricultural market is growing consistently, non-cyclical, and independent of agricultural market effects. Internal view is that competitors have been investing in pricing and there is room to increase at Envi
- Portfolio is considered non-discretionary spend due to critical nature of products and comprises <10% of spend for end-customer total cost
- Prior portfolio-wide price increase (3.9% FC2022) was successful with no pushback
- Preliminary analysis of commissions / incentives indicates misalignment with business objectives

Project objectives are:

- Identify concrete pricing actions at a granular level to protect margin and achieve profitability growth targets, mitigate inflation risk and increase pricing data transparency for steering
- Understand and optimize Agency commission / Distributor incentive structure to align with revised contribution to carve-out
- Build a sustainable pricing capability at Envi

Source: Simon-Kucher & Partners. Preliminary conversations between Simon-Kucher and Envi, B&B Company Overview, 11th or 2nd in each vertical
Pricing Excellence for Envi | Simon-Kucher

Some slides might contain notes with information about the client and its operating details that should be removed.

You can also use the notes button to delete the notes right below the slide.

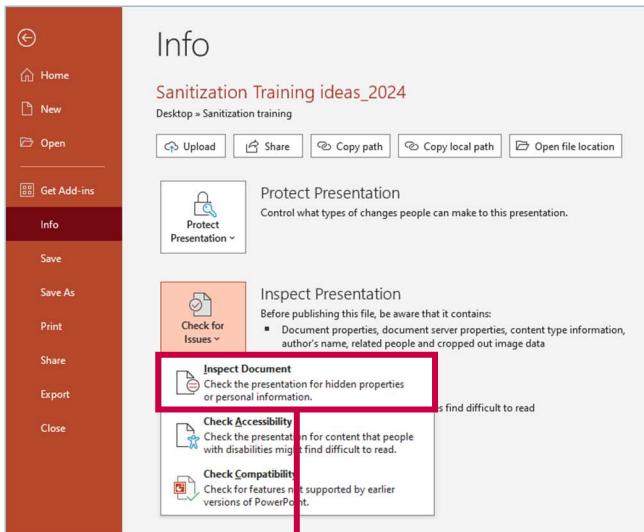
Envi (formerly Bayer Environmental Science) is the preeminent provider of environmental control solutions in the world with \$555M in revenue in 2019 with an expected CAGR of 5%

ngdom) Accessibility: Investigate

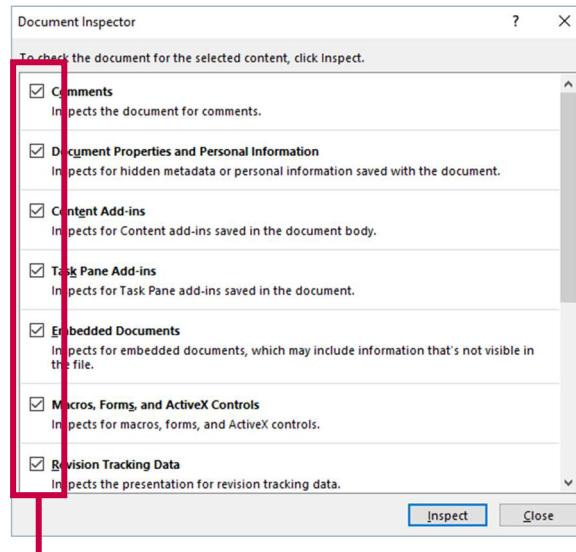


Last but legendary: How to perform the document inspection

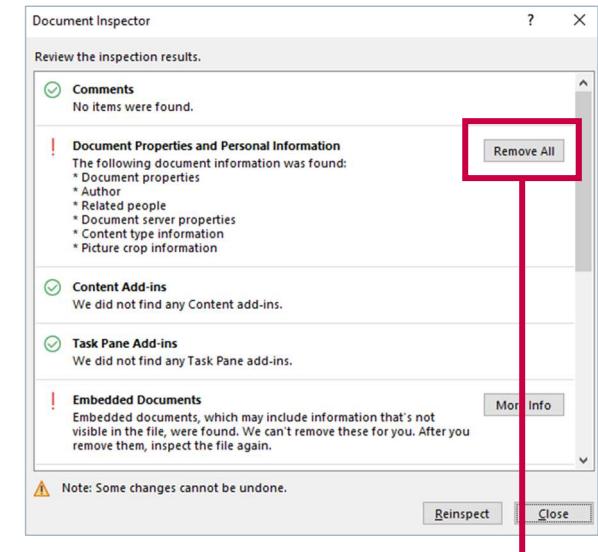
TO PERFORM THE DOCUMENT INSPECTION, SELECT **FILE** → **INFO** → **CHECK FOR ISSUES** → **INSPECT DOCUMENT**



Access the document info to perform its inspection.



Tick all the boxes for a full document inspection.



Remove all the information you deem necessary, e.g., authors, picture crop information, notes, off-slide content.

Scrub the speak, keep it sleek: How to replace client specific terms

Price Sensitivity

Item #	Item	Elasticity
4116700843	ICY HOT PTCH BCK LGIXL 3-5CT	-0.60
4116705820	ASPRCRM LIDO CRM 2.7 OZ	-0.66
4116700910	ICY HOT ROLL ON 2.5OZ	-0.54
4116700841	ICY HOT PTCH SML 5CT	-0.47
4116708010	ICY HOT ADVC CRM 2 OZ	-0.43
2390000891	ICY HOT CRM 3OZ	-0.44
4116717100	ICY HOT LIDO CRM 2.7OZ	-0.52
4116705703	ASPRCRM CRM :	
4116708047	ICY HOT SMR RLF KN	
4116705810	ASPRCRM ROLL LIDO	

Remove names that might not bear immediate resemblance to client but still could be client-revealing (client items, products, solutions, catchphrases).

Price Sensitivity

Item #	Item	Elasticity
[X]	Item A	-0.60
[X]	Item B	-0.66
[X]	Item C	-0.54
[X]	Item D	-0.47
[X]	Item E	-0.43
[X]	Item F	-0.44
[X]	Item G	-0.52
[X]	Item H	-0.71
[X]	Item I	-0.23
[X]	Item J	-0.56

If your slide has no value added after sanitization (e.g., just a frozen empty chart), consider removing the entire slide.

Scrub the speak, keep it sleek: How to find & replace client specific acronyms

1

Scan the document as sometimes the full name or its context are mentioned somewhere in the text. You can also review other documents from the same project or the same client.

2

Go to [Acronym Finder](#) or similar websites to check if the acronym is available there.

3

Google the acronym. If you don't find satisfactory results, try adding client, industry or project topic to the search for more precise results.

How to win		What to deploy
3 Leverage the portfolio Capturing the full value potential in brands	4 Holistic Integration Focus core functions from communications to rewards	5 Consumer Engagement Balanced ATL, BTL & digital strategies and initiatives
8 Upgrade OBPPC's Boost the architecture's design and integration	9 360° Activation Develop Pictures of Success and Execution Playbook	10 Intercept the shopper Excellence in execution that seduces and persuades

While “ATL” and “BTL” are general business terms (“Above The Line”, “Below The Line”), “OBPPC” is a strategy name related mostly to client and should be replaced with a descriptive placeholder, e.g., “[RGM strategy]”.

From names to connections: Spot & sanitize related entities! (1/2)

Initial understanding and objectives

Huron leadership recognizes the opportunity to optimize pricing for its Innosight [Business unit] by establishing a pricing framework and providing dedicated deal coaching

- Innosight serves as **Huron's growth strategy arm**, helping clients to navigate disruptive change, enable innovation, and manage strategic transformation

- Acquired in 2017, Innosight **complements Huron's strategic, operational, and technology capabilities** by supporting clients across multiple industries in the development of pioneering solutions to achieve sustained growth

- Innosight has approximately **10** employees across North America, APAC, and Europe

- In recent months, Innosight has **strategy consulting space** (e.g., [Business unit]) would like to determine how **to improve competitiveness and increase win rates** while maintaining profitability

- Additionally, leadership believes **practices in pricing tactics (e.g., Good, Better, Best) and provide focused coaching** to re-enforce key concepts in pricing, negotiation, and sales techniques

Source: Simon-Kucher with [Client] input.
Innosight Pricing Optimization | February 2023



Initial understanding and objectives

[Client] leadership recognizes the opportunity to optimize pricing for its [Business unit] by establishing a pricing framework and providing dedicated deal coaching

- [Business unit] serves as **[Client]'s growth strategy arm**, helping clients to navigate disruptive change, enable innovation, and manage strategic transformation

- [Business unit] **complements [Client]'s strategic, operational, and technology capabilities** by supporting clients across multiple industries in the development of pioneering solutions to achieve sustained growth

- [Business unit] has approximately **[X] employees** across North America, APAC, and Europe

- In recent months, [Business unit] has **lost several deals to competitors in the strategy consulting space due to price**, and [Client] leaders would like to determine how [Business unit] can **leverage different pricing models to improve competitiveness and increase win rates** while maintaining profitability

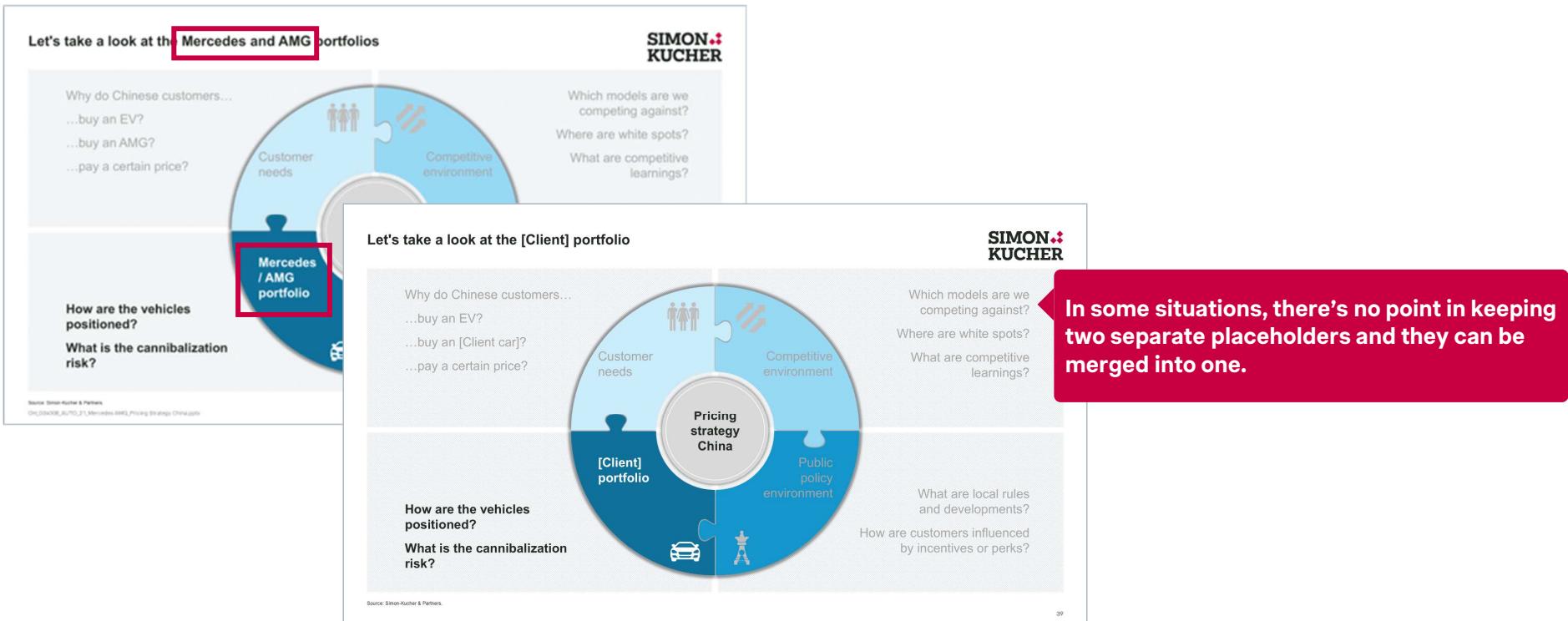
- Additionally, leadership believes there is an opportunity to **implement best practices in pricing tactics (e.g., Good, Better, Best) and provide focused coaching** to re-enforce key concepts in pricing, negotiation, and sales techniques

Source: Simon-Kucher with [Client] input.
[Subsidiary] Pricing Optimization | February 2023

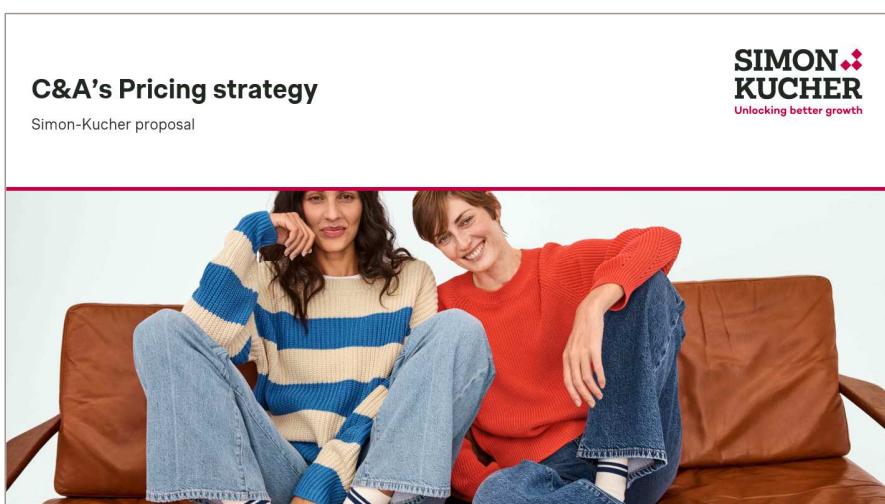
To differentiate various client entities, you can use separate placeholders to highlight the relation between them, e.g., **Business Unit, Department, Subsidiary, Sister company, Parent company**.



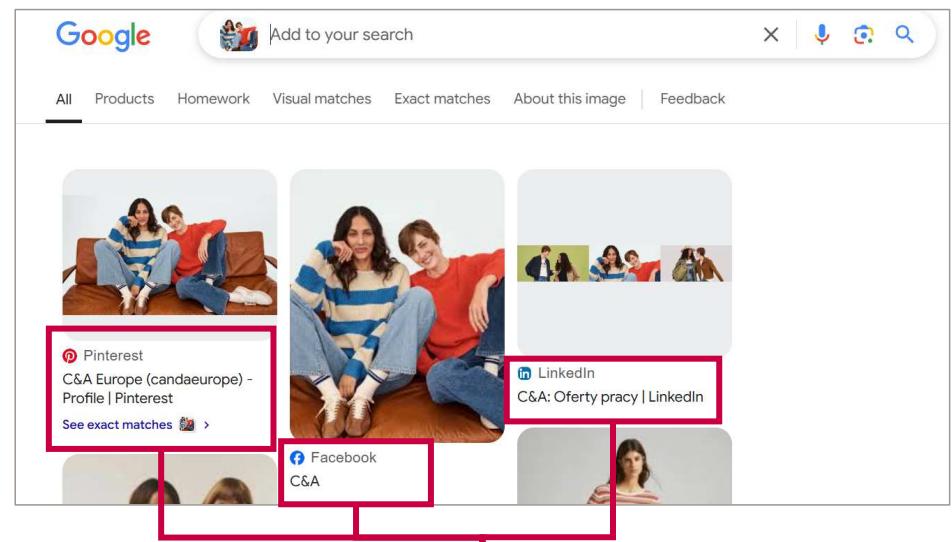
From names to connections: Spot & sanitize related entities! (2/2)



Don't be fooled by appearances: Generic-looking pics might actually contain client data



Pictures that seem generic may contain client product or plant/factory, so check if the picture's source is mentioned in its bottom left corner (especially for stock pictures).



If you're not sure about the picture, you can use the Google image search function or remove/replace just to be on the safe side. In this example search result shows the same image on client's social media page.

Work smarter, not harder: Check for slide versions of pictures first!

Final deliverable: What we will deliver at the end of the 4 week engagement

Final recommendation deck summarizing key decisions on Freshening Beads launch strategy

- ✓ Clearly prioritized launch objectives
- ✓ Decision criteria for evaluating routes to market (e.g. channel partners)
- ✓ Comprehensive evaluation of long-list of partners
- ✓ Short-list of launch strategic options: Highest potential consumer journeys mapped, prioritized partners identified at each stage
 - ✓ Outline of implications and trade-offs for each scenario
- ✓ High level roadmap and execution plan given each strategic option

Source: Simon-Kucher & Partners
Simon-Kucher & Partners | Colgate | Proposal | February 2021

Before you start sanitizing print screens check if there is no slide version of the image later in the document

Decision framework: Aligned upon key objectives and principles working with the right partner(s) will enable us to achieve

Main objectives

- ✓ Drive trial and reach target segment(s)
- ✓ Drive incremental usage occasions
- ✓ Build and support a modern brand
- ✓ Collect consumer data and feedback to inform strategy and future product iterations

Guiding principles: The right partner...

- Reaches "Zillennials"
- Connects Freshening Beads with consumers at the right occasions (freshening breath, after a meal, during work)
- Creates a brand halo effect that supports Freshening Beads bold and modern brand positioning

Main objectives

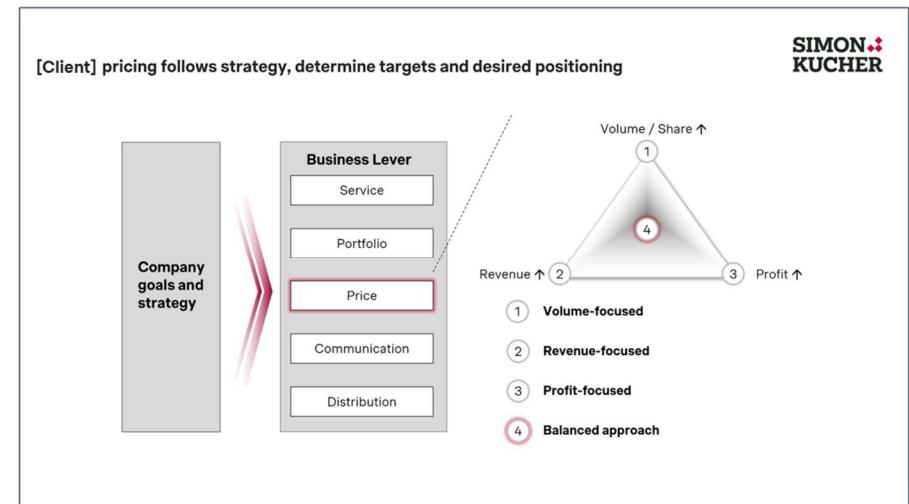
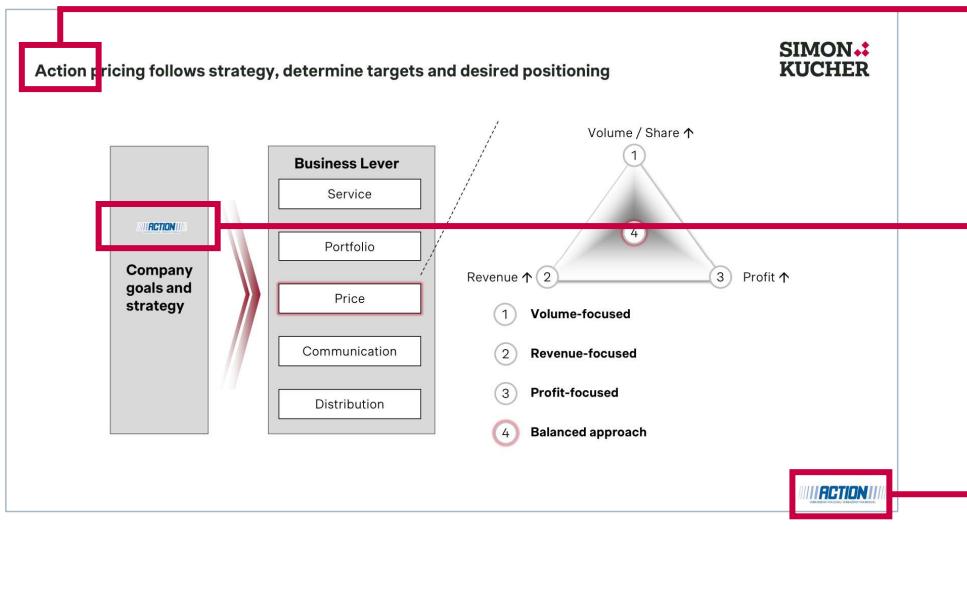
- ✓ Drive trial and reach target segment(s)
- ✓ Drive incremental usage occasions
- ✓ Build and support a modern brand
- ✓ Collect consumer data and feedback to inform strategy and future product iterations

Guiding principles: The right partner...

- Reaches "Zillennials"
- Connects [Hygiene product] with consumers at the right occasions (freshening breath, after a meal, during work)
- Creates a brand halo effect that supports [Hygiene product]'s bold and modern brand positioning
- Creates buzz and excitement
- Enables collection of consumer feedback
- Will be ready to operationalize and launch by Q4 2021

Source: Simon-Kucher & Partners
Simon-Kucher & Partners | Client | Proposal | February 2021

Blur it or block it: How to sanitize pictures (1/2)



When there's no slide version of the image you may sanitize the image by blurring it or covering the spots with relevant placeholders.

Blur it or block it: How to sanitize pictures (2/2)

Overview: These are ContiTech IFS's key strengths, the resulting customer value and the most important arguments to prove it

Key Strengths:

- Experience, brand, history and relationships
- Consistent quality
- Superior service level

Key Value to Customer:

- Reliable partnerships
- Strong technical support
- Low risk, reliable quality
- Sustainability edge

Key Proof Points:

References	Facts	Value Stories
Longstanding segment / industry experience Very few quality claims, high quality Preferred supplier of customers from various industries and even sought after by competition	Strong brand with 150 year legacy #1 largest rubber manufacturer globally 10 different departments working together	The endurance and longevity of ContiTech and Michelin tires can be seen and proven in operation – recently, a 20 years old hose was found, still working fine and being in operation – thus having a much longer lifetime than is expected on the market.

Overview: These are ContiTech IFS's key strengths, the resulting customer value and the most important arguments to prove it

Key Strengths:

- Business history, business culture, innovation, quality, customer service, cost
- Business history, business culture, innovation, quality, customer service, cost

Key Value to Customer:

- Business history, business culture, innovation, quality, customer service, cost
- Business history, business culture, innovation, quality, customer service, cost

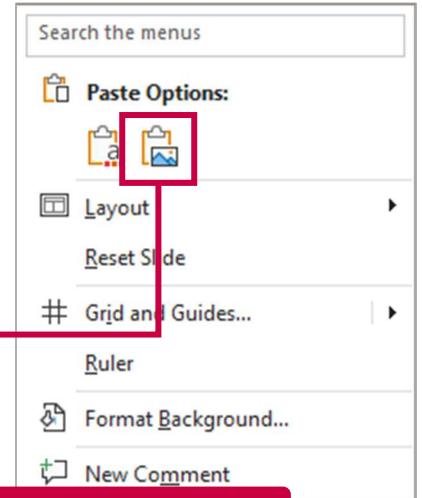
Key Proof Points:

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Longstanding segment / industry experience Very few quality claims, high quality Preferred supplier of customers from various industries and even sought after by competition	Strong brand with 150 year legacy #1 largest rubber manufacturer globally 10 different departments working together	The endurance and longevity of ContiTech and Michelin tires can be seen and proven in operation – recently, a 20 years old hose was found, still working fine and being in operation – thus having a much longer lifetime than is expected on the market.

To blur a picture, you can either:

1) Select Picture Format → Artistic Effect and choose one of the available options;

2) Select Picture Format → Picture → Picture corrections and change the sharpness of the image until client identifiers are no longer visible.



After blurring the image always copy and paste it as a picture otherwise the changes made are reversible.

Spot the hidden: Pictures might contain hidden identifiers!

Key question from customer perspective:
What does Mercedes-AMG stand for in the future?

Today: Core pillars of Mercedes-AMG brand		Future: Brand USP for battery electric vehicles	
Engine & Performance		Engine & Performance	
Design		Design	 ?
Prestige		Prestige	
New pillar?		New pillar?	 ?

On the customer side, 2 key challenges arise from Mercedes-AMG's entry into the EV market in China

01 How to sustain **customer value** and compensate the loss of a source of competitive advantage?

02 How to **price** the new customer value and position effectively in the competitive space?

AMG的定位是“非凡驾驭之多——德国运动豪华”。作为戴姆勒集团在高性能汽车市场的技术先锋，AMG以“非凡驾驭”作为品牌承诺，同时又通过其代表客户核心竞争力：豪华且均衡的产品品质和动力性能而座驾，为客户带来酣畅淋漓的多重感官体验。

Source: Simon-Kucher



Key question from customer perspective:
What does Mercedes-AMG stand for in the future?

Today: Core pillars of Mercedes-AMG brand		Future: Brand USP for battery electric vehicles	
Engine & Performance		Engine & Performance	
Design		Design	 ?
Prestige		Prestige	
New pillar?		New pillar?	 ?

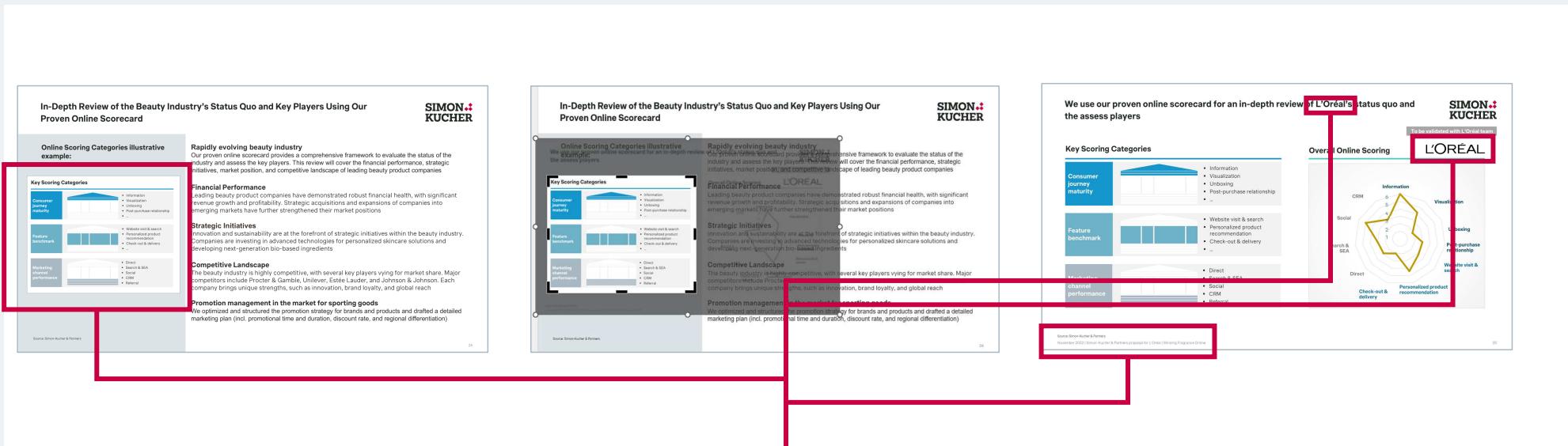
AMG公司

AMG都位于非凡驾驭之多——德国阿特巴赫。作为戴姆勒集团在高性能汽车细分市场中的技术先锋，AMG以“非凡驾驭”作为品牌承诺，始终以尖端科技与执着匠心磨砺自我：旨在打造兼具品质和动力的高性能座驾，为客户提供酣畅淋漓的多重感官体验。



Some images may seem safe to keep while the parts that are covered might contain client identifiers. Use CTRL + A to select every possible items on the slide and look for hidden objects

Full view, full clean: Check pictures for cropped parts!



Make sure that pictures haven't been cropped as there might be parts of them that are not visible at first glance.

Use the Picture Format → Crop option to check if it reveals non-sanitized parts of the graph. If it does, use the copy and paste as a picture function.

You can also remove all unnecessary areas of the cropped images at once by clicking Picture Format → Compress choosing “Delete cropped areas of pictures” and unchecking “Apply only to this picture” to ensure all images are protected

Stay sharp at the start: Initial situation requires extra attention!

UNITED's objective is to develop the right processes and tools to ensure that RGM team has the capabilities for the challenges ahead



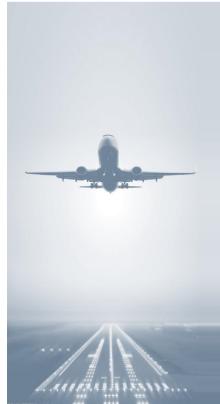
Point of departure

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- Coca-Cola UNITED is the 3rd largest bottler in the USA and has been expanding considerably in the last years (>4x in the last 10 years)
- During this time, Coca-Cola UNITED has developed internal Revenue Growth Management capabilities, methodologies and processes; however, they are facing several challenges with their digital tools and systems to support the business decisions
- UNITED developed the current RGM tools used to evaluate and monitor performance vs. plans. While these tools work well currently there is room for improvement in order to set UNITED up for success and build out best-in-class RGM analytics capabilities
- Additionally, Coca-Cola UNITED would like to understand what a best-in-class RGM team looks like: what are the right methodologies and processes? What does the organization look like? Who is responsible for what? How can the corporate team can support the different OUs? etc.
- Therefore, Coca-Cola UNITED has reached out to Simon-Kucher to potentially support this initiative in 2021

Source: Simon-Kucher & Partners; Initial conversation with Coca-Cola UNITED on 6/9/21.
Coca-Cola UNITED | Simon-Kucher | RGM Diagnostic

[Client]'s objective is to develop the right processes and tools to ensure that RGM team has the capabilities for the challenges ahead



Point of departure

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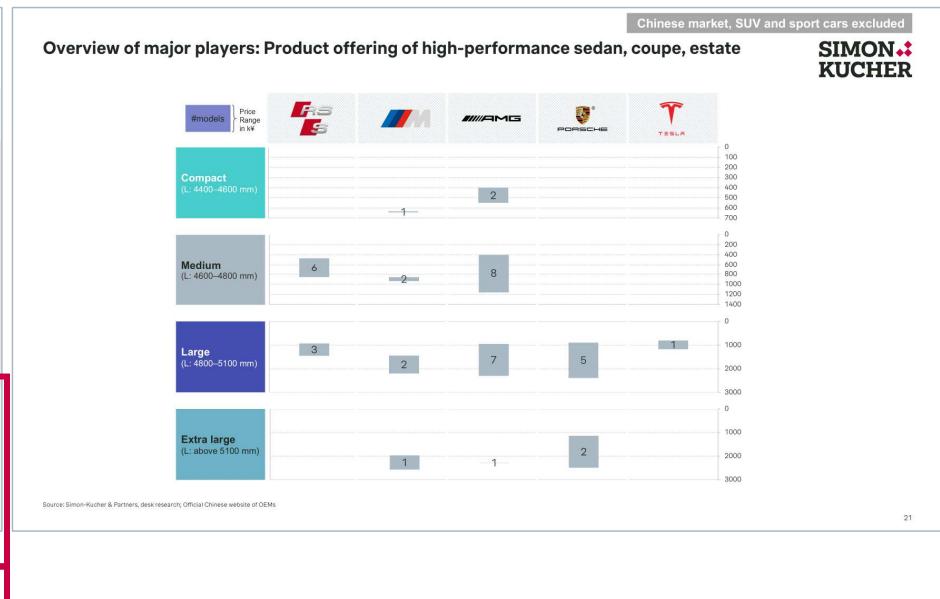
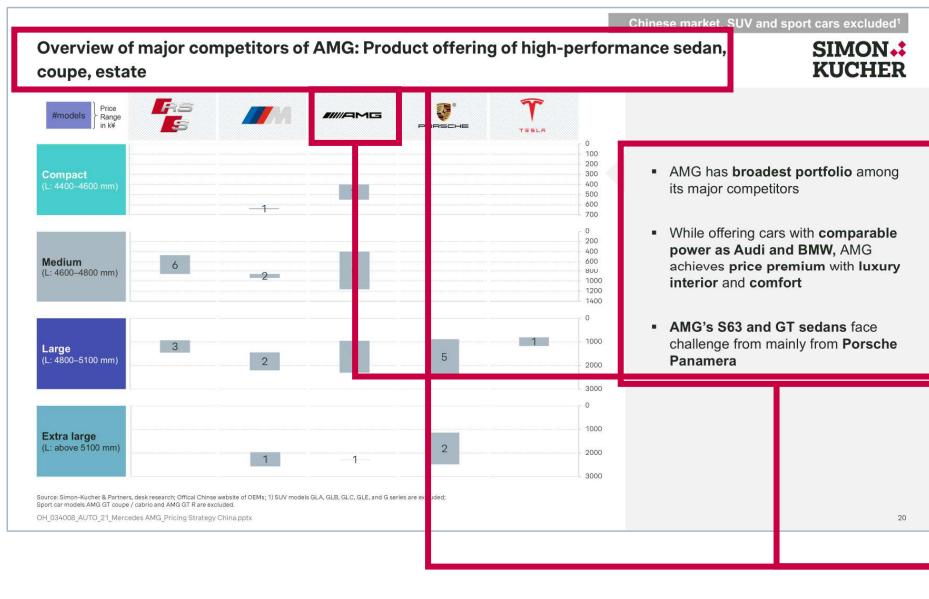
- [Client] has developed internal Revenue Growth Management capabilities, methodologies and processes; however, they are facing several challenges with their digital tools and systems to support the business decisions
- [Client] developed the current RGM tools used to evaluate and monitor performance vs. plans. While these tools work well currently, there is room for improvement in order to set [Client] up for success and build out best-in-class RGM analytics capabilities
- Additionally, [Client] would like to understand what a best-in-class RGM team looks like: what are the right methodologies and processes? What does the organization look like? Who is responsible for what? How can the corporate team can support the different OUs? etc.
- Therefore, [Client] has reached out to Simon-Kucher to potentially support this initiative in 2021

Source: Simon-Kucher & Partners; Initial conversation with [Client] on 6/9/21.
[Client] | Simon-Kucher | RGM Diagnostic

Initial situation and market positioning of the client is a highly revealing information. You can remove this information completely if it does not add any value or you can try generalizing it, e.g., "Client is #2 brand in the local market" ☀ "Client is a strong brand in the local market".

Use public, protect private: Publicly available market data can stay, client identifiers must go! (1/3)

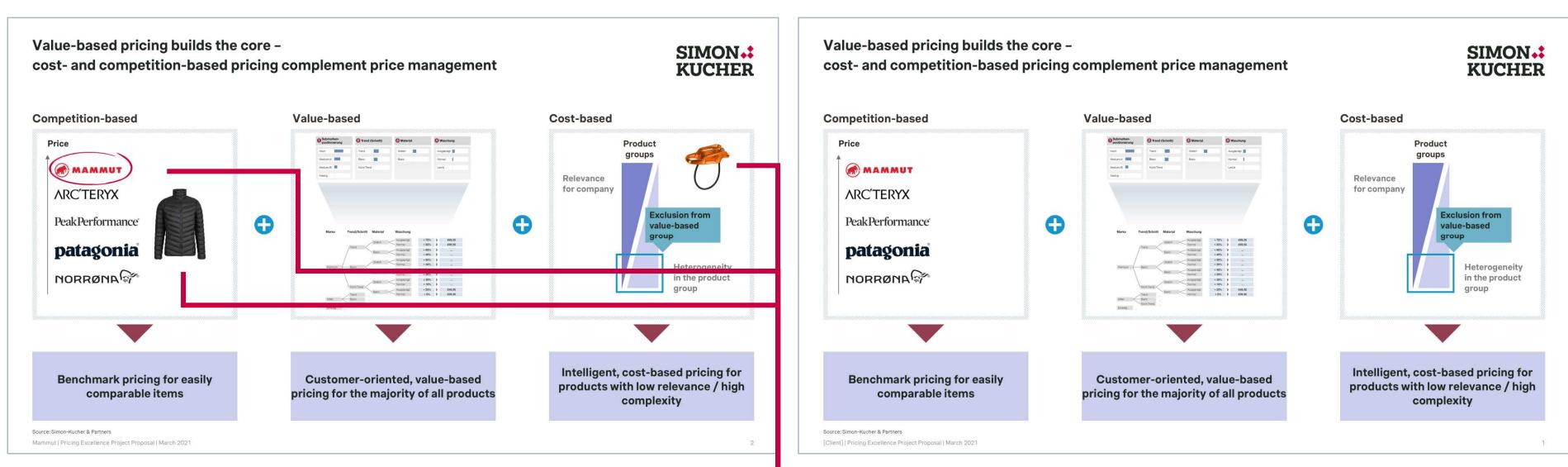
SIMON KUCHER



On market overview slides you can easily disguise the client by making it look like other market participants without removing client data - if a client is one of the biggest players, its absence might be noticed.

The best approach is to hide any indication of client or comments on its performance. You can also rephrase the slide title to make it more general, e.g., replace “Overview of major competitors of AMG” with “Overview of major players”

Use public, protect private: Publicly available market data can stay, client identifiers must go! (2/3)



There's no need to remove client's logo from benchmarks, however, circle markings and pictures of client products need to be removed.

Use public, protect private: Publicly available market data can stay, client identifiers must go! (1/3)

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Project scope focuses on Bacardi's off-trade assortment and key channels/customer in Germany

Project scope²

- Folding, i.e., list price reduction in exchange for trade terms without counter performances (incl. off-invoice trade terms)¹
- Trade terms logic, i.e., trade terms with counterparts and investments which also acts as blueprint for other markets
- Implementation support, i.e., preparation of implementation plan and supporting materials incl. negotiation coaching
- Comprehensive playbook, i.e., folding concept and trade terms logic and rules/processes for their application
- International roll-out, i.e., folding and trade terms approach are validated with selected European countries

Countries²



Assortment



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Channel/customers



Project scope focuses on [Client]'s off-trade assortment and key channels/customer in Germany

Project scope²

- Folding, i.e., list price reduction in exchange for trade terms without counter performances (incl. off-invoice trade terms)¹
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Countries²



Assortment



Channel/customers



1) i.e. off-invoice terms without counterparts are shifted to invoice and list prices are reduced in exchange for terms without counterpart, without changing the list price structure (i.e. the relationship of the SKUs to each other); 2) Project scope and countries dependent on selected project option; 3) Displayed accounts exemplary, final key account selection defined by [Client] depending on agreed scope; 4) For France/UK developed approaches are reviewed based on interviews with selected market experts from [Client] → no data analyses or development of differentiated approaches.

1) i.e. off-invoice terms without counterparts are shifted to invoice and list prices are reduced in exchange for terms without counterpart, without changing the list price structure (i.e. the relationship of the SKUs to each other); 2) Project scope and countries dependent on selected project option; 3) Displayed accounts exemplary, final key account selection defined by [Client] depending on agreed scope; 4) For France/UK developed approaches are reviewed based on interviews with selected market experts from [Client] → no data analyses or development of differentiated approaches.

1

1

The client logo doesn't need to be removed from the general market participants overview but might be dragged lower with other logos shuffled to not attract attention.

Local ties reveal: If geographies point to the client, replace them!

Geography

Global: 2023 Price Increase Validation (First 4 Weeks)



- Cost to Price
- Inflation
- Jan 2023 Pricing Approach Validation
- Top 4 Business Segments

North America + France: Pricing Diagnostic (Following 8 Weeks)





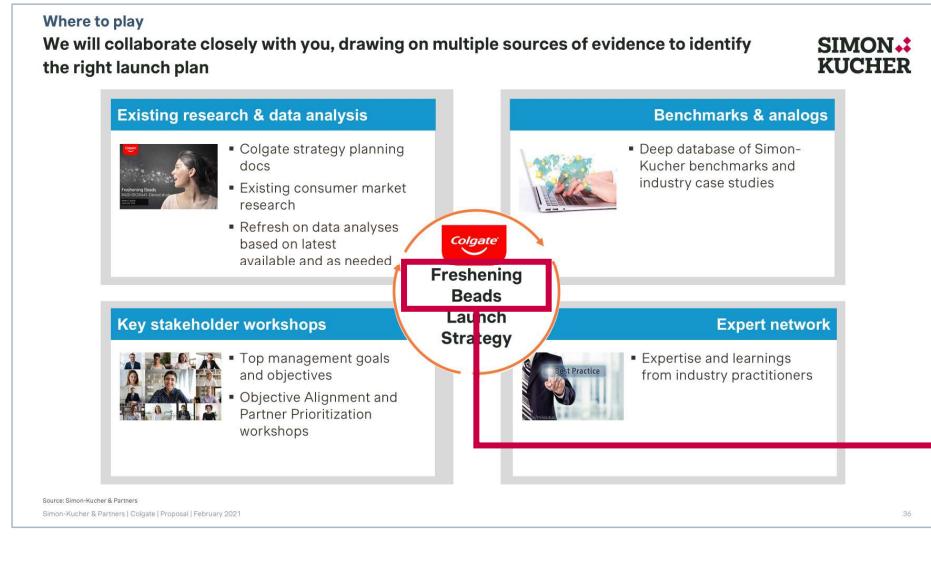
- Status quo pricing diagnostic
- Quick Wins and financial impact assessment
- Price optimization roadmap
- Price transparency tool
- Price governance design
- Top 2 Business Segments

[Region 1] + [Region 2]: Pricing Diagnostic (Following 8 Weeks)

- Status quo pricing diagnostic
- Quick Wins and financial impact assessment
- Price optimization roadmap
- Price transparency tool
- Price governance design
- Top 2 Business Segments

Check if the geographies that a client operates in are specific to the industry. Replace client-related information with appropriate placeholder [Country], [Market], [Region] and remove country flags or maps. Larger markets are usually safer to keep, e.g., USA, EU, APAC, etc.

Tech tells tales: Swap client specific technologies, tools & approaches out



Quick research shows that only two companies, and one large among those, use this technology.
This information needs to be removed along with any other client identifiers and replaced with relevant placeholder that describes the product best without revealing it, e.g., [Product]/[Innovative product]/[Hygiene product].

Confidential data: Keep it secret, preserve the proportions

Revised financial impact: Optimized portfolio prices to make maximum impact for client and channel partners										Simon-Kucher project example
Scenarios	Scenario Pricing: MSRP				Portfolio impact					SIMON KUCHER
	Safety Good	Safety Best	Premium Good	Premium Best	Unit Volume	Retail Revenue	Client Margin \$	Retailer Margin \$		
1 New portfolio: Drive volume growth	\$200	\$250	\$250	\$300	+36%	+46%	-18%	+72%		
2 New portfolio: Balanced approach	\$200	\$250	\$300	\$350	+26%	+43%	+13%	+69%		
3 New portfolio: Skim high	\$250	\$300	\$300	\$350	+24%	+56%	+66%	+82%		

Recommendation

Source: Simon-Kucher & Partners; data anonymized to protect client confidentiality

Revised financial impact: Optimized portfolio prices to make maximum impact for client and channel partners										Simon-Kucher project example
Scenarios	Scenario Pricing: MSRP				Portfolio impact					Dummy data applied
	Safety Good	Safety Best	Premium Good	Premium Best	Unit Volume	Retail Revenue	Client Margin \$	Retailer Margin \$		
1 New portfolio: Drive volume growth	\$140	\$175	\$175	\$210	+36%	+46%	-18%	+72%		
2 New portfolio: Balanced approach	\$140	\$175	\$210	\$245	+26%	+43%	+13%	+69%		
3 New portfolio: Skim high	\$175	\$210	\$210	\$245	+24%	+56%	+66%	+82%		

Recommendation

Source: Simon-Kucher & Partners; data anonymized to protect client confidentiality

When the client data is confidential consider keeping the proportions only by multiplying all whole numbers (e.g., in a chart or in a table) by the same value (e.g., 0,7) and add “Dummy data applied” note on the side

Confidential data: Keep it secret, remove entirely

Revised financial impact: Optimized portfolio prices to make maximum impact for client and channel partners										Simon-Kucher project example
Scenarios	Scenario Pricing: MSRP				Portfolio impact					SIMON KUCHER
	Safety Good	Safety Best	Premium Good	Premium Best	Unit Volume	Retail Revenue	Client Margin \$	Retailer Margin \$		
1 New portfolio: Drive volume growth	\$200	\$250	\$250	\$300	+36%	+46%	-18%	+72%		
2 New portfolio: Balanced approach	\$200	\$250	\$300	\$350	+26%	+43%	+13%	+69%		
3 New portfolio: Skim high	\$250	\$300	\$300	\$350	+24%	+56%	+66%	+82%		

Recommendation

Source: Simon-Kucher & Partners; data anonymized to protect client confidentiality

Revised financial impact: Optimized portfolio prices to make maximum impact for client and channel partners										Simon-Kucher project example
Scenarios	Scenario Pricing: MSRP				Portfolio impact					SIMON KUCHER
	Safety Good	Safety Best	Premium Good	Premium Best	Unit Volume	Retail Revenue	Client Margin \$	Retailer Margin \$		
1 New portfolio: Drive volume growth	\$[X]	\$[X]	\$[X]	\$[X]		+36%	+46%	-18%	+72%	
2 New portfolio: Balanced approach	\$[X]	\$[X]	\$[X]	\$[X]		+26%	+43%	+13%	+69%	
3 New portfolio: Skim high	\$[X]	\$[X]	\$[X]	\$[X]		+24%	+56%	+66%	+82%	

Recommendation

Source: Simon-Kucher & Partners; data anonymized to protect client confidentiality

When multiplication does not add any value (for example: investments, commercial fees, client headcount, number of divisions, revenue, user statistics, etc.), they can be also sanitized by deleting data and adding Xs instead.

Know your numbers: Sanitize the sensitive, keep the rest!



Some slides only contain percentage values. If not client-revealing they are fine to be kept in the original form.

- Worldpay has recently become an independent company. Worldpay & FIS will remain strategic go-to-market partners through long-term commercial arrangements, providing both Worldpay & FIS clients continued access to a broad set of complementary solutions. This development will mean that Worldpay takes more responsibility and autonomy for aligning, designing, supporting, and governing sales compensation.

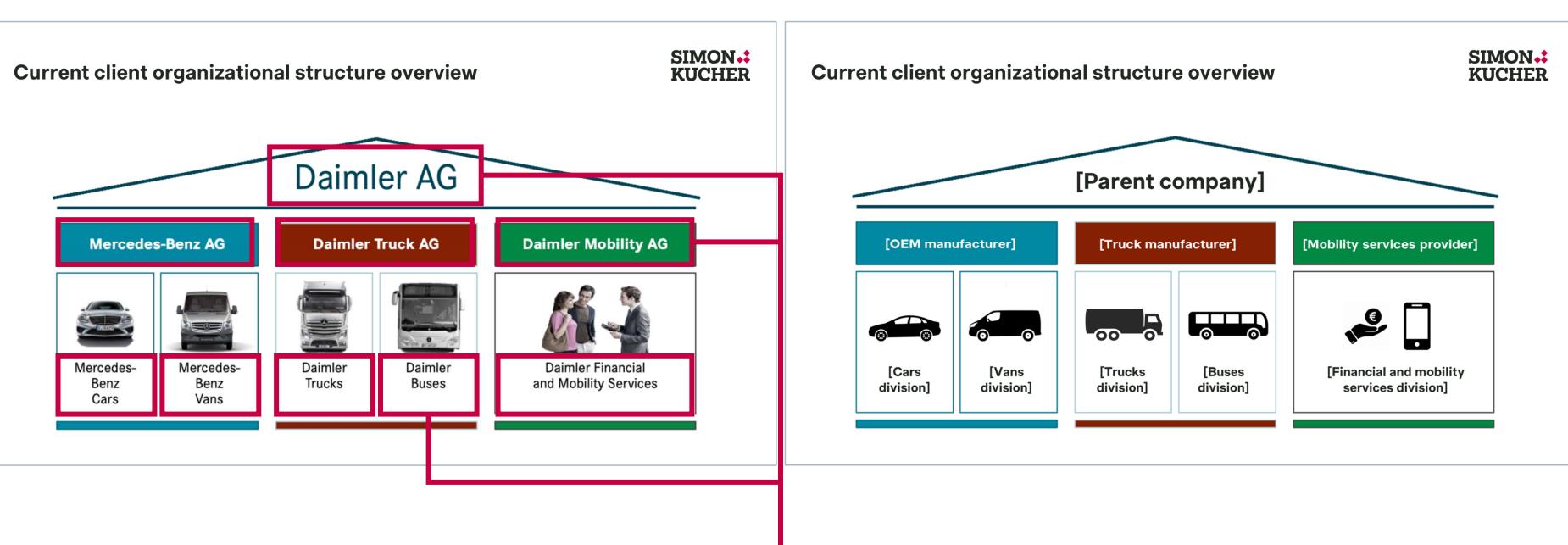
- Worldpay's global Sales team, consisting of over [X] employees across multiple roles, requires competitive sales compensation that is carefully aligned with talent requirements and financial objectives
- Worldpay's Enterprise segment has over [X] sales employees in [X] plans and [X] regions to cover multiple channels and functions (e.g., Partner Development, Strategic Sales, Relationship Management, etc.)
- There are questions around the alignment of Enterprise Relationship Management and Strategic Sales compensation plans to strategy and customer profitability. Worldpay has asked Simon-Kucher to analyze these plans, benchmark against market practices, and recommend improvements to help support growth going forward.

- [Client] has recently become an independent company. [Client] & FIS will remain strategic go-to-market partners through long-term commercial arrangements, providing both [Client] & FIS clients continued access to a broad set of complementary solutions. This development will mean that [Client] takes more responsibility and autonomy for aligning, designing, supporting, and governing sales compensation.

- [Client]'s global Sales team, consisting of over [X] employees across multiple roles, requires competitive sales compensation that is carefully aligned with talent requirements and financial objectives
- [Client]'s Enterprise segment has over [X] sales employees in [X] plans and [X] regions to cover multiple channels and functions (e.g., Partner Development, Strategic Sales, Relationship management, etc.)
- There are questions around the alignment of Enterprise Relationship Management and Strategic Sales compensation plans to strategy and customer profitability. [Client] has asked Simon-Kucher to analyze these plans, benchmark against market practices, and recommend improvements to help support growth going forward.

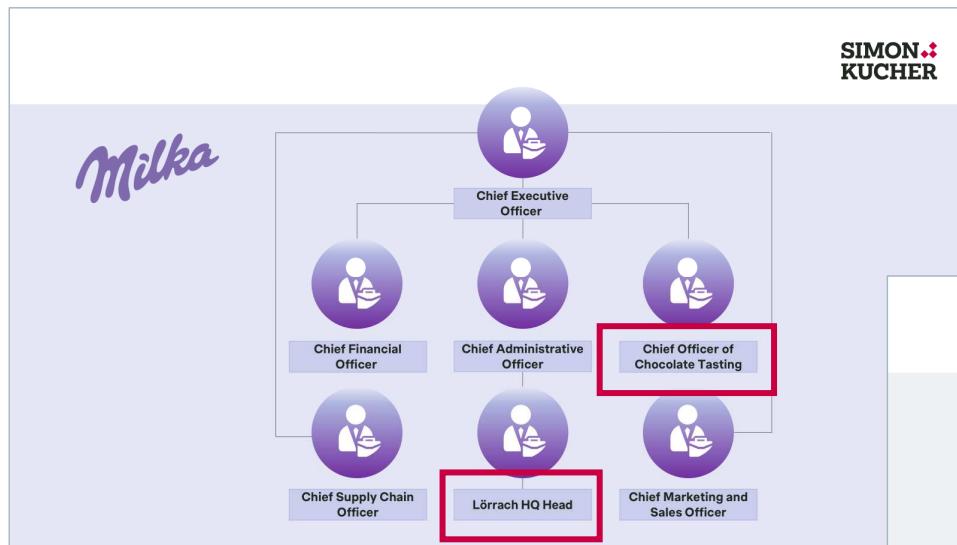
Apart from financial data there might be other values in number or in plain text that might be client-revealing like employees, plans or regions. They might not always be client-specific but usually do not give any value added.

Extra eyes on org charts: They reveal more than you think!

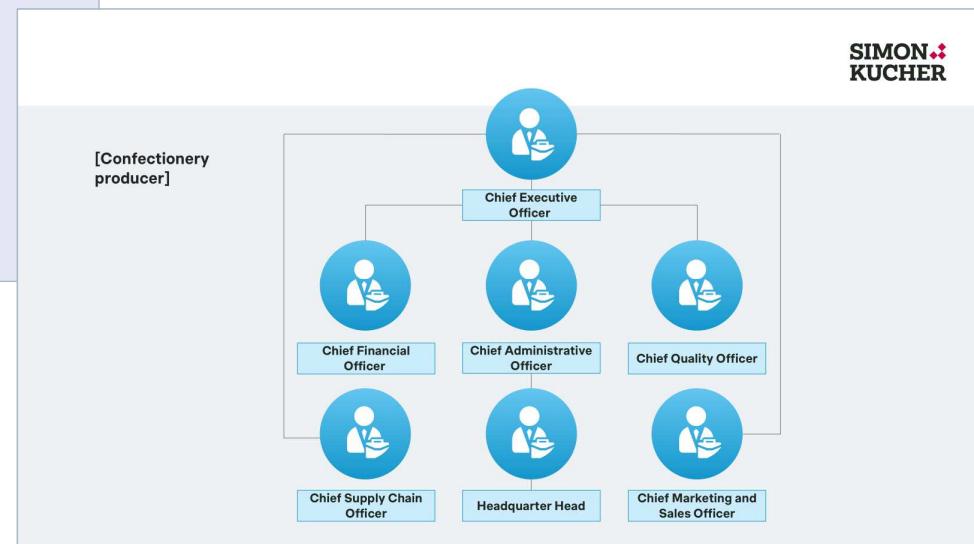


An organization chart is a diagram outlining the internal structure of the company. It contains roles, responsibilities or products and relationship between individuals within the organization. Make sure to sanitize the client-specific names, products or markets.

Sanitizing org charts: Names out, functions in!



The best approach is to use general terms as organizational taxonomy replacements for the roles and functions to be still visible after sanitization.



Legal & team slides: Play it safe! (1/3)

Value and Investment for Colgate

Value	Investment	
Strong return on investment: We will ensure that you secure and grow your profit potential.		
We are the world's leading pricing advisor: Simon-Kucher has conducted >1000 revenue growth projects in the last 3 years and has dedicated pricing specialists which will support the project.		
Deep industry specialists: Simon-Kucher has worked with many category leaders and challenger brands within the CPG space. We know how your business and the industry dynamics work.		
We have the right people: We provide an experienced team of experts who know how to address your challenges, capture the full pricing potential and have the capabilities to translate solutions into daily routines.		
Neutral, trusted and accepted advisor: We are very "down to earth" and transparent in our approach to pricing – that's why we are trusted and accepted across all of our clients' management levels.		

Source: Simon-Kucher & Partners
Simon-Kucher & Partners | Colgate | Proposal | February 2021

SIMON KUCHER

Professional Fees	Timing / Working weeks	Professional fee
Phase 1:	4 weeks	\$180K

Terms and conditions:

- Prompt access to data (Scanner, Panel, previous existing research), as required; additional data request costs are not included in project fees
- Travel, market research (panel recruitment; survey programming and hosting etc.), and other out-of-pocket expenses are additional and will be billed at cost
- 25% of Simon-Kucher professional fee due upon commissioning project and monthly billing for the rest of the engagement
- 7% data and computational licensing fee
- Any delays to project timeline (e.g. scheduling/data delays) to be billed at weekly run rate of 50k USD
- Payment terms are net 90 days
- Fees and terms will expire 180 days after submission

Example of an investment slide that should be removed completely.

Legal & team slides: Play it safe! (2/3)

The Simon-Kucher project team has in-depth experience with trade investment and net revenue management in consumer goods



Team*	Experience
Jon Snow Partner	<ul style="list-style-type: none"> ▪ Responsible partner ▪ Sparring for the project team and participation in steering committee / key workshops ▪ Contact person for adidas management
Ed Stark Project steering	<ul style="list-style-type: none"> ▪ Steering of concept development ▪ Participation in steering committee and workshops ▪ Contact person for adidas management
Tyrion Lannister Project lead	<ul style="list-style-type: none"> ▪ Operational project management ▪ Concepts, workshops, interviews, benchmarks ▪ Daily contact person for adidas project management and local teams
Daenerys Targaryen Consultant	<ul style="list-style-type: none"> ▪ Data analysis and impact validation, benchmarks ▪ Preparation and support for workshops, interviews
Edmure Tully Data engineer	<ul style="list-style-type: none"> ▪ Data compilation and database creation ▪ Exchange with data experts at adidas

Remove all the details of any external contractors engaged in SK projects.

Remove all details of current and previous cooperation with the client for every team member.

Legal & team slides: Play it safe! (3/3)



Replace logos and pictures with a placeholder of similar shape and size.

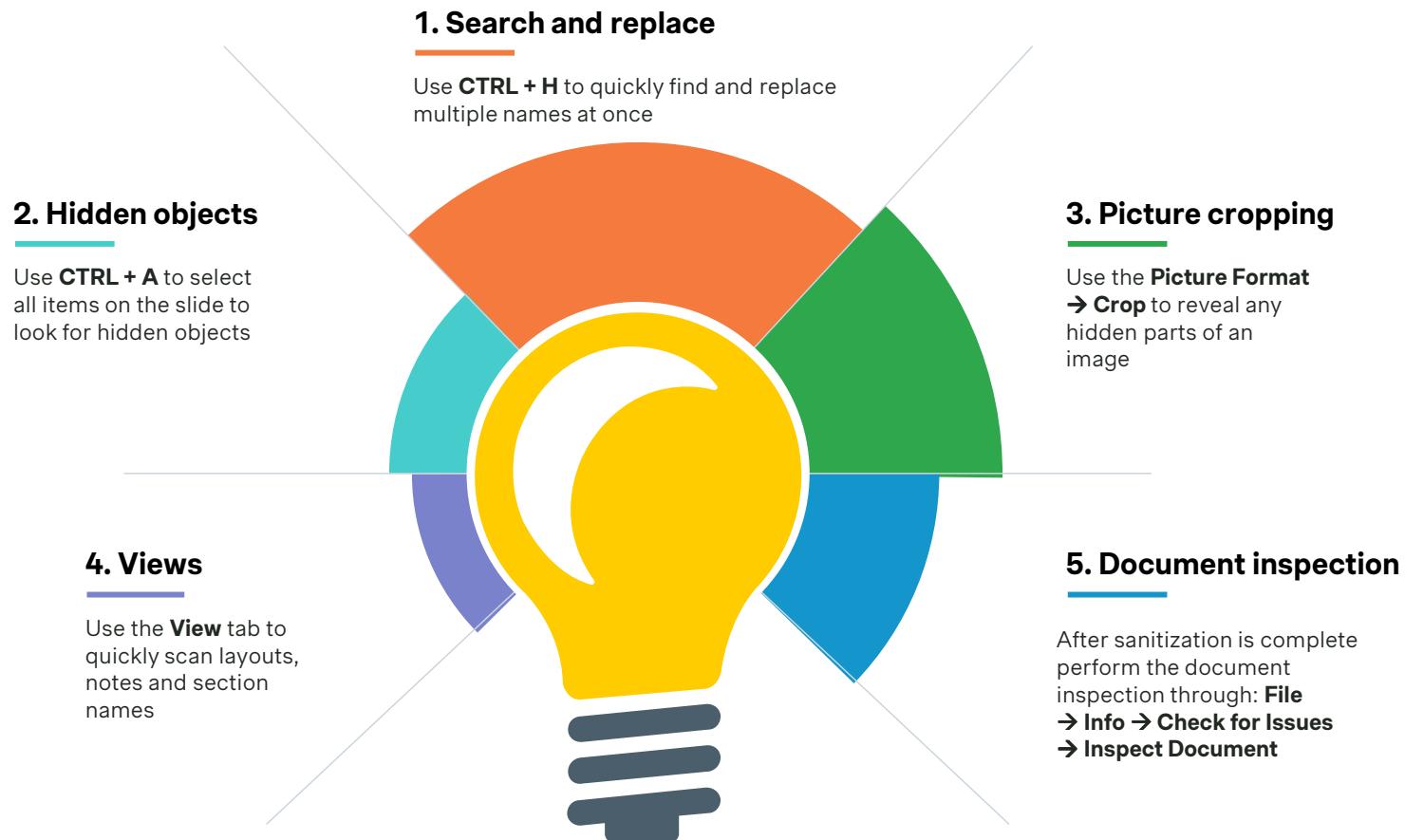


Remove all the details of any external contractors engaged in SK projects.

SK team members' names are safe to be kept.

Replace client employees' names with [Names] placeholder. General position names can be left unsanitized where possible (e.g., Project Manager).

Get Faster. Stay Secure: Master the best tips & tricks!



Sanitization checklist

REMOVE	DISGUISE	CHECK	CHANGE	ALWAYS
<ul style="list-style-type: none"> ▪ Company name including staff names ▪ Departments and business units ▪ Client-related entities ▪ Logos ▪ Branding, including colors ▪ Client-related terms, abbreviations and acronyms ▪ Product names and pictures ▪ Contract details ▪ References to current and previous cooperation with the client 	<ul style="list-style-type: none"> ▪ Client's market positioning ▪ Client-specific operating regions ▪ Numeric values ▪ Commercially sensitive information and other potentially protected content of third parties 	<ul style="list-style-type: none"> ▪ Screenshots to verify if they are sanitized ▪ Whether screenshots are properly cropped ▪ Document footer ▪ And sanitize document notes ▪ Section names ▪ Font ▪ Slide master ▪ For hidden information through document inspection 	<ul style="list-style-type: none"> ▪ The document title ▪ The document name 	<ul style="list-style-type: none"> ▪ Make sure documents are properly sanitized before moving or copying them out of the project folder ▪ Request approval from the lead partner after sanitization to ensure the document is ready to share ▪ See our comprehensive sanitization guidelines on WeShare

We have more detailed sanitization guidelines on WeShare



- 01** | [WeShare Sanitization Page](#)
- 02** | [Technical Tips & Tricks](#)
- 03** | [Sanitization Checklist](#)
- 04** | [Confidentiality Policies](#)



Thank you.

Questions?

Contact your Confidentiality Service