



Skills & Capability

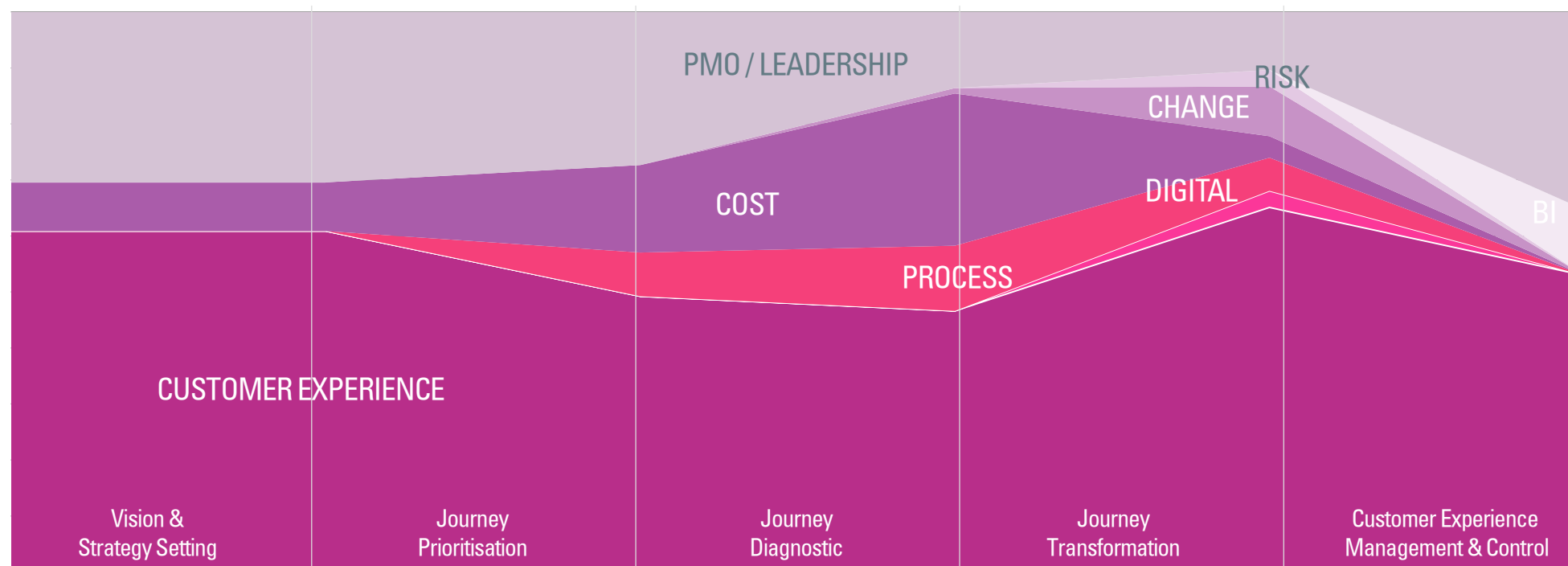
"I have always believed that the way you treat your employees is the way they will treat your customers, and that people flourish when they are praised."

Sir Richard Branson
Founder of Virgin Group



Summary of Role Profiles Across CX Method Stages

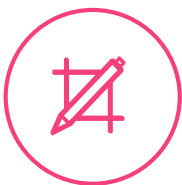
The following figure provides an indication of the relative proportion of skills required to successfully transform a clients customer experience. The nature of the “Transformation Journey” stage is such that transformation opportunities will vary from engagement to engagement, for example we would draw your attention to the relatively light proportion of digital design and development effort indicated in this example.



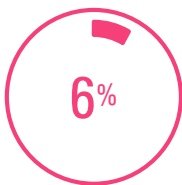


Skills & Capability > Skill Requirement Guidance

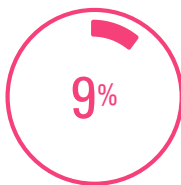
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



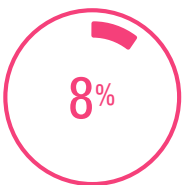
CX Architect



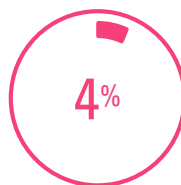
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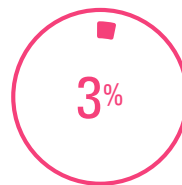
Vision &
Strategy Setting



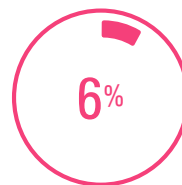
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The CX Architect works directly with the engagement director and the client lead to ensure the success of the project. The primary role of the CX Architect is to ensure that all of the “dots” are connected. Along with the more traditional project management roll, such as keeping the project schedule and budget, the CXA serves as the hub of communication for the team.

The goal of the CXA is to create a single team approach by working to facilitate the interaction between the KPMG team and your team and work to insure the project goals and vision are adhered to.

Skills / Experiences Required

A director or senior manager, this person will have significant experience of shaping and delivering large scale customer experience analysis and redesign projects.

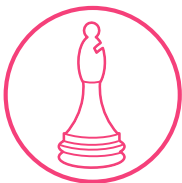
Skills: Programme and project management | stakeholder management with senior clients | highly creative as well as analytical (a rare combination).

A key skill will be to challenge the status quo of “that’s the way things are done around here” and truly think in the customers shoes.

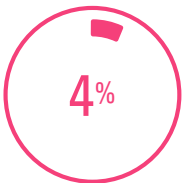


Skills & Capability > Skill Requirement Guidance

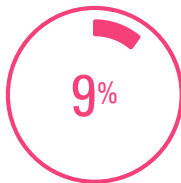
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



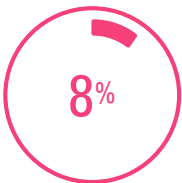
CX Strategist



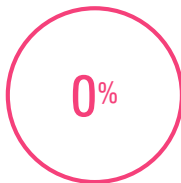
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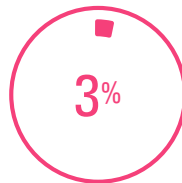
Vision &
Strategy Setting



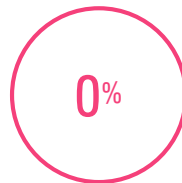
Journey
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Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The CX Strategist during the early stage of the project to take existing client data relating to their customers and turn this into meaningful segments which in turn can be analyzed.

The CXS will have experience of driving the development of or clarification of clients customer strategy.

Skills / Experiences Required

A senior manager, this person will have core skills in customer segmentation techniques and data analysis and will be comfortable in working with large sets of sometimes disparate sources of customer information. The strategist will usually sit within the 'Strategy Group' function or capability and will have been involved in defining the strategic growth options for clients.

Skills: Segmentation analysis | organizational strategy | highly numerate | data analytics.



Skills & Capability > Skill Requirement Guidance

- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



Expectations of the Role

The CX Journey Lead plays a key role particularly during the Journey transformation Step and will be the person who will coordinate the effort of a small team to identify and priorities improvement options arising from the analysis in previous stages.

The CX Lead will facilitate ideation workshops with the client to identify a range of people, process or digitally enabled transformation options and will map these over time such that the transformation effort for a specific journey can be identified.

Skills / Experiences Required

A senior manager, this person will have core skills in customer experience and in particular customer journey mapping. The Journey Lead will have strong project management skills and able to facilitate workshop sessions to drive clarity on options for future experience improvements.

Skills: Journey mapping | Customer experience | programme management | workshop facilitation.

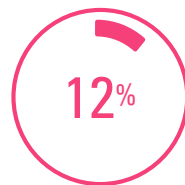


Skills & Capability > Skill Requirement Guidance

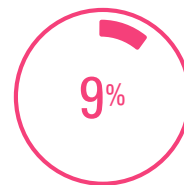
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- **Skills & Capability**
 - Role Profiles Across CX Stages
 - **Role Profiles**
 - Overview of Special Capabilities



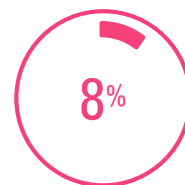
CX Consultants



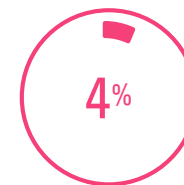
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Vision &
Strategy Setting



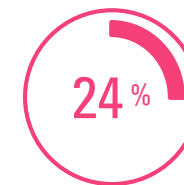
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Customer Experience
Management & Control

Expectations of the Role

The CX Consultants are the fast moving team supporting the CX Architect and journey leads in driving understanding of the current state and of driving the development of future transformation options. The CX Consultants play a key role particularly in the final step by defining the governance arrangements and use of appropriate metrics and tools to best hold the organization to account for customer experience on an ongoing basis.

Skills / Experiences Required

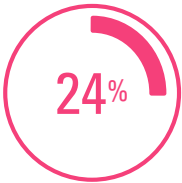
Usually at manager grade, the CX consultants will have a good grounding in our methods and be equipped with our tools and techniques to best support the Customer experience diagnostic and transformation activities. They will be good “all-rounders” capable of discussing and analyzing a range of improvement options covering people process or digital.

Skills: Customer strategy| journey mapping | governance arrangements | project management | stakeholder management | analytical

- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



CX Analyst



Average



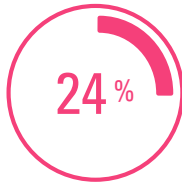
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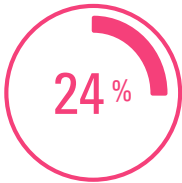
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Skills & Capability > Skill Requirement Guidance

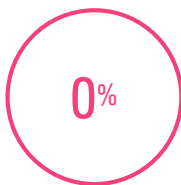
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



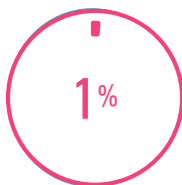
CX Illustrator



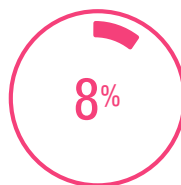
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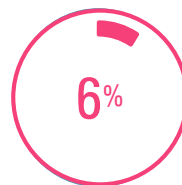
Vision &
Strategy Setting



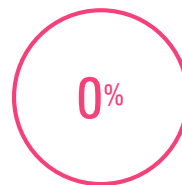
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The CX Illustrator brings creative flair and plays a key role right from the start of an engagement in visually depicting the strategic aims and objectives of the organization and of visually depicting the experiential aims of the organization.

The CX Illustrator captures information live, on the spot, during client workshops as a means to gain a common understanding of the challenges faced by the organization.

The illustrator will work with the CX Architect and ethnographer to capture the current and state journey maps, and work with the team (and including customers where they can) to define future customer journeys that better meet or exceed customer expectations, behaviors and motivations.

Skills / Experiences Required

CX Illustrators usually work for intense short bursts of activity to support the gathering of information, to define a shared vision and to capture current and future state interactions. The CX Illustrator needs to be comfortable with 'live' capture generating rapid fire real time sketches and cartoons that can be developed further.

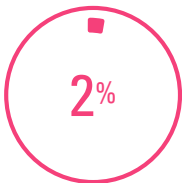
The CX Illustrators will be able to take a number of different feeds of information and distil these down to a small number of useable personas, and to depict graphically the customer experience at key moments of truth.

Skills: Real time sketching, graphic artistry | listening skills | excellent people skills

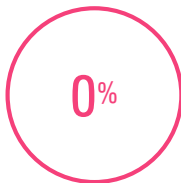
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



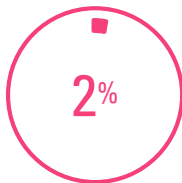
Ethnographer



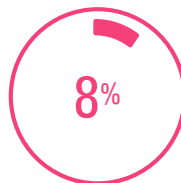
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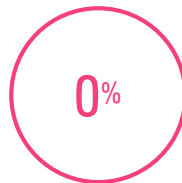
Vision &
Strategy Setting



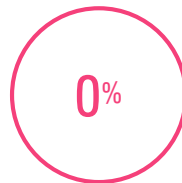
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The Ethnographer works hand in hand with the CX strategist to work with real customers to understand their behavioral motivations and expectations at key moments of truth on selected customer journeys.

We would expect the ethnographer to work with the Graphic Artist and the Process Specialist to drive the depiction of current state and future state customer journeys. An important element of the role will be to coordinate various resources (internal or external) required to facilitate customer focus groups in order to drive deeper, qualitative understanding of behaviors, needs and desires of customers. The ethnographer will work to build up the definition of key customer segments and build customer personas using our Persona Grid and Empathy Map tools.

Skills / Experiences Required

This person usually comes from a behavioral science related discipline such as psychology and are adept at listening to what people say and watching what people do.

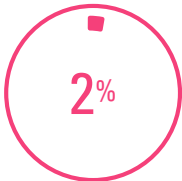
They are highly empathetic and have great people /social skills required to draw out key insights of customer behaviors. This person will have experience of planning and facilitating observation workshops and of gathering and analyzing information to glean key behavioral insights.

Skills: Behavioral analysis | Workshop facilitation | customer journey mapping | focus group research | customer research

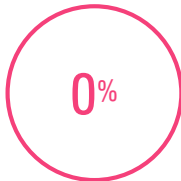
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



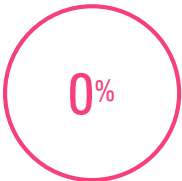
Researcher



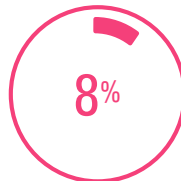
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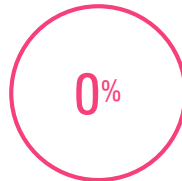
Vision &
Strategy Setting



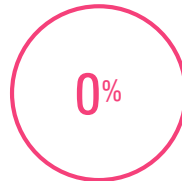
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The customer researcher works with client teams to identify and source existing customer satisfaction or related measures. They will conduct deep dive research to quantify customer insights at key moments of truth.

Depending upon the size of the engagement they may commission 3rd party market research in order to drive the insights and so will be the coordination point between the CX team and the 3rd party research team.

Skills / Experiences Required

This person typically comes from a market research background and has personal experience of designing survey methods and of quantitative and qualitative customer analysis.

Skills: customer research | market analysis | Behavioral analysis | Workshop facilitation | focus group research |

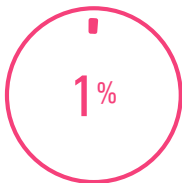


Skills & Capability > Skill Requirement Guidance

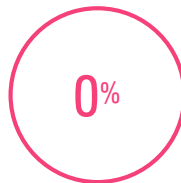
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



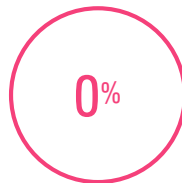
Digital Developer



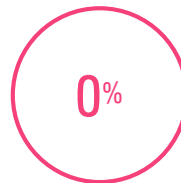
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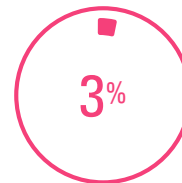
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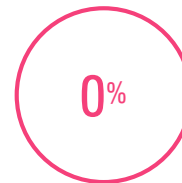
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The Digital Developer may be a single person, or may be the coordination point for a larger digital development team of technical leads, graphic designers, and user interface developers and testers.

The Digital Developer designs and builds user interfaces that maintain strict, pixel perfect fidelity with the designs produced by the CX Strategist and CX Artist and support the exchange of information between an experience's users and its back-end processes and databases.

Their output is functional, testable, shippable code that lets users accomplish their goals when using a digital device. The Digital Developer is also responsible for documentation that allows others to maintain their code.

Skills / Experiences Required

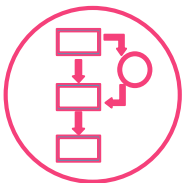
Digital Designers are usually highly accomplished graphic designers and customer user interface designers rolled into one. They are highly creative and capable of producing concept designs, wireframes, mock-ups and prototypes from the information produced by the wider team. Depending upon the nature of the engagement, the Digital Designer may not work on digital interfaces but produce pixel perfect visual displays and information that aids understanding of current state and desired future state. This is usually a different skillset from CX Artists.

Skills: Graphic Design (using common design software packages) | User Interface skills | Visual information analysis and presentation skills

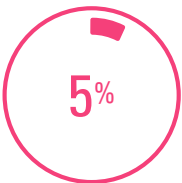


Skills & Capability > Skill Requirement Guidance

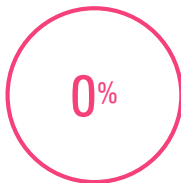
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



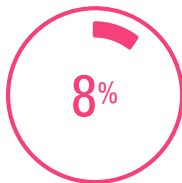
Process Specialist



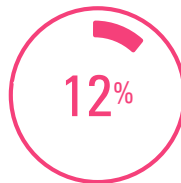
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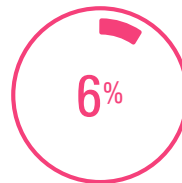
Vision &
Strategy Setting



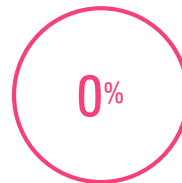
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The Process Specialist will bring relevant and up to date understanding of the key client challenges and using their knowledge of the subject at hand will drive the development of current state journey maps.

The process specialist will work hand in hand with the CX Strategist to ensure that processes are captured and depicted from a customer perspective. The Process Specialist will also play a key role in identifying potential process and experiential improvements.

Skills / Experiences Required

A solid consultant at manager level, they will have a sound understanding of Lean methods and of process mapping using the different process 'levels' hierarchy commonly used in enterprise-wide process mapping. This person will have a combination of classic process mapping skills / experiences with customer experience questioning and understanding.

Skills: Lean process mapping methodology experience such as SIPOC (Supplier Inputs Process Output Customer) | Skill at using process mapping software such as Microsoft Visio | customer experience mapping (journey mapping)

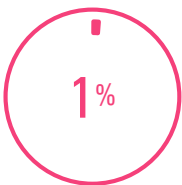


Skills & Capability > Skill Requirement Guidance

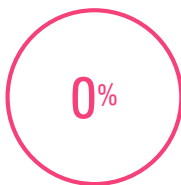
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



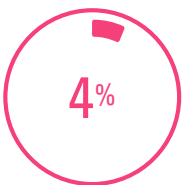
Cost Director



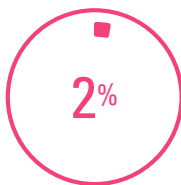
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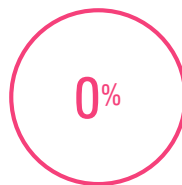
Vision &
Strategy Setting



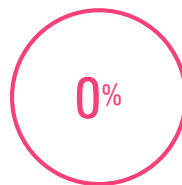
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The Cost Director brings deep insight on the financial structure of organizations and of the most appropriate allocation of costs across products and services within an organization.

The Cost Director will play a key role during the Journey Prioritisation stage by driving a high level view of costs sufficient to aid the identification and prioritisation of those journeys that tell an interesting story from a customers point of view but also which drive value for the client.

Skills / Experiences Required

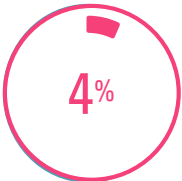
An experienced cost management consultant (typically a director), this person will have several years of experience of analyzing the cost structures of an organization and of combining various cost data sources to identify the true cost of providing services to customers

Skills: highly numerate | cost analysis | ability to summarise and draw insights from high level cost information

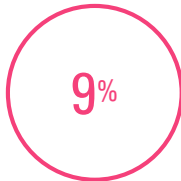
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



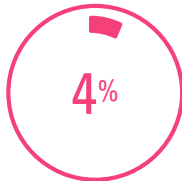
Cost Specialist



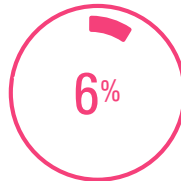
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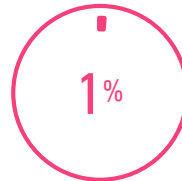
Vision &
Strategy Setting



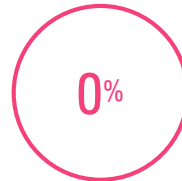
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The Cost Specialist brings an in-depth understanding of financial management and cost structures and applies financial analysis techniques to understand and map operational costs against customer journeys. The role is key to unearthing key insights during Journey Targeting and Customer Journey Deep Dive on those activities that cost an organization a lot more money than the relative value of the customer or of their experience at key moments of truth.

The Cost Specialist will work hand in hand with the CX Strategist and CX Analysts to gather the right information with which to analyze, and to combine cost insight with experiential insights

Skills / Experiences Required

Usually an experienced cost management consultant (typically a senior manager), this person will have several years of experience of analyzing the cost structures of an organization and of combining various cost data sources to identify the true cost of providing services to customers

Skills: highly numerate | cost analysis | ability to summarise and draw insights from high level cost information

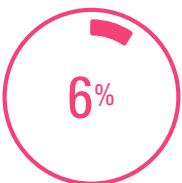


Skills & Capability > Skill Requirement Guidance

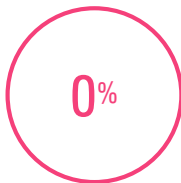
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



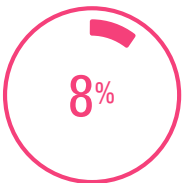
Cost Analysts



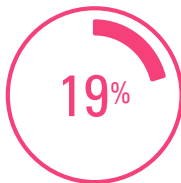
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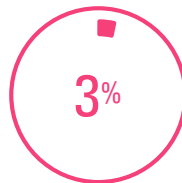
Vision &
Strategy Setting



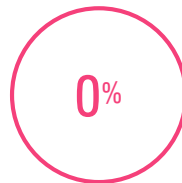
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The Cost Analysts support the development of understanding of the cost allocation across products and services and customer journeys during the Journey Prioritisation stage and Journey Diagnostic stage.

Skills / Experiences Required

Typically managers with a strong track record and ability to allocate operational and overhead costs across an organization.

Skills: highly numerate | cost analysis

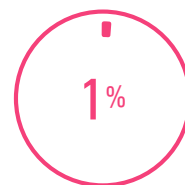


Skills & Capability > Skill Requirement Guidance

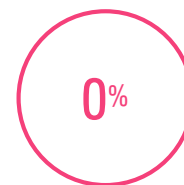
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



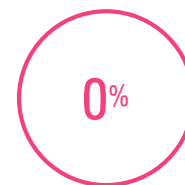
Change Manager



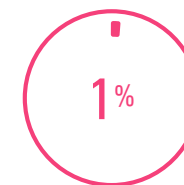
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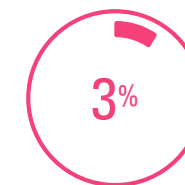
Vision &
Strategy Setting



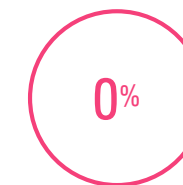
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The Change Manager works with a wide range of stakeholders to drive a common understanding of the strategic vision of the organisation and of its vision for improved customer experience. This role is particularly important during the Framing & Assessment steps in working with a range of stakeholders to surface business requirements.

During the Journey Deep Dive step, the Change manager plays a key role in engaging with and canvassing opinion of stakeholders regarding the analysis findings up to that point. The Change Manager ensures that communication flows correctly across the team and that the benefits of any proposed changes to the customer experience or to related operational processes have been captured and shared.

Skills / Experiences Required

A strong consultant at manager level, this person will be highly people oriented and have a solid track record of working on significant business change projects. They should be equipped with the right toolkit of people and change related skills, methods and tools.

Skills: Visioning | strategic change | benefits capture | communications | stakeholder engagement (people skills)

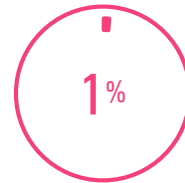


Skills & Capability > Skill Requirement Guidance

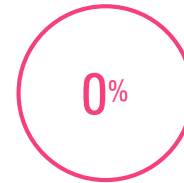
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- **Skills & Capability**
 - Role Profiles Across CX Stages
 - **Role Profiles**
 - Overview of Special Capabilities



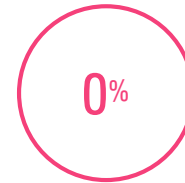
Change Consultant



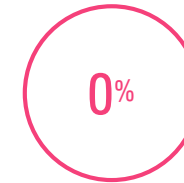
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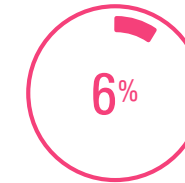
Vision &
Strategy Setting



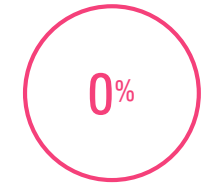
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The Change Consultant supports the Change Manager, particularly in identifying and developing prioritised solutions during the Journey transformation stage. They will use their understanding of people and cultural drivers to develop options that enhance the customer experience.

Skills / Experiences Required

A strong consultant at manager level, this person will be highly people oriented and have a solid track record of working on significant business change projects. They should be equipped with the right toolkit of people and change related skills, methods and tools.

Skills: Visioning | strategic change | benefits capture | communications | stakeholder engagement (people skills)

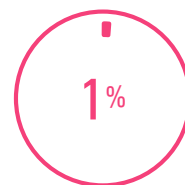


Skills & Capability > Skill Requirement Guidance

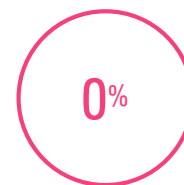
- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities



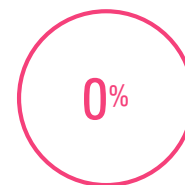
Risk Controller



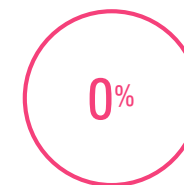
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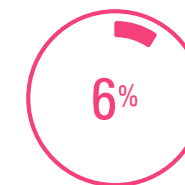
Vision &
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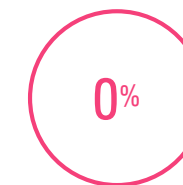
Journey
Prioritisation



Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

Customer risk specialist works across the end to end lifecycle of the project to identify risks to the customer experience in both the current and future states. Risks to the customer experience are potential events with the ability to undermine the clients brand and service strategies.

In a world of mass connectivity even small service outages, delays in execution and capabilities gaps in front line staff can threaten brand equity. Depending on the nature of the program the role may involve the capture and quantification of customer experience risks, the identification of opportunities to mitigate in the design stage and the development of controls for the ongoing management phase.

Skills / Experiences Required

This person is typically at Senior Consultant or Manager level and will have a good understanding of the types of events and incidents which can erode customer trust and threaten value for the client.

They will have technical skills and experiences to assess risks across all parts of the value chain through design, sales and service

Skills: Risk impact assessment | controls assessment

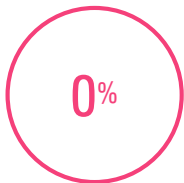
Skills & Capability > Skill Requirement Guidance



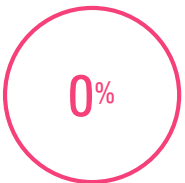
BI Specialist



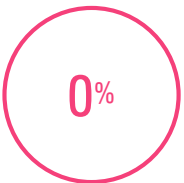
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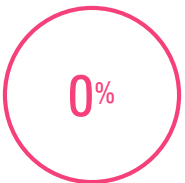
Vision &
Strategy Setting



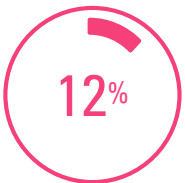
Journey
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Journey
Diagnostic



Journey
Transformation



Customer Experience
Management & Control

Expectations of the Role

The Business Information Specialist works with the CX Analysts and the Change Manager to define requirements for ongoing capture and measurement of the customer experience (and other related Customer service measures).

This role is a combination of driving clarity and agreement on the measures that matter most to the organization (with respect to its customers), while coordinating the development of an ongoing governance model and reporting framework.

Depending on the nature of the engagement, this role may require the development of reporting mock-up ups and prototypes using specialist BI software.

Skills / Experiences Required

This person is typically at Senior Consultant or Manager level and will have a good understanding of the different customer specific measures in use and how these are applied.

They will have technical skills and experiences in developing reporting dashboards using a range of software tools, from simple Microsoft Excel, through to sophisticated BI software.

Skills: Analysis | Requirements Gathering | software analysis and reporting tools – MS Excel as a minimum | Creative layout skills (in conjunction with Digital Designer)



Skills & Capability > Skill Requirement Guidance

- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability**
 - Role Profiles Across CX Stages
 - Role Profiles**
 - Overview of Special Capabilities

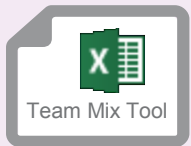
Summary of Role Profiles Across CX Method Stages

The following table is a summary of suggested roles involved on a CX engagement with each role as a proportion of the total team involvement at each stage.

Roles	Average	Vision & Strategy Setting	Journey Prioritisation	Journey Diagnostic	Journey Transformation	Customer Experience Management & Control
CX Architect	6%	9%	8%	4%	3%	6%
CX Strategist	4%	9%	8%	0%	3%	0%
CX Journey Lead	3%	0%	0%	0%	15%	0%
CX Consultants	12%	9%	8%	4%	15%	24%
CX Analyst	24%	35%	23%	16%	24%	24%
CX Illustrator / Designer	3%	0%	1%	8%	6%	0%
Ethnographer	2%	0%	2%	8%	0%	0%
Customer Researcher	2%	0%	0%	8%	0%	0%
Digital Designer	1%	0%	0%	0%	3%	0%
Process Specialist	5%	0%	8%	12%	6%	0%
Cost Director	1%	0%	4%	2%	0%	0%
Cost Specialist	4%	9%	4%	6%	1%	0%
Cost Analysts	6%	0%	8%	19%	3%	0%
Change Manager	1%	0%	0%	1%	3%	0%
Change Consultant	1%	0%	0%	0%	6%	0%
Risk & Control SME	1%	0%	0%	0%	3%	0%
BI / Reporting SME	2%	0%	0%	0%	0%	12%
Partner	4%	4%	4%	2%	1%	6%
CX Director	6%	9%	8%	4%	3%	6%
PMO	14%	17%	16%	8%	6%	24%



Team Mix Tool...





- The Toolkit
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability
- Role Profiles Across CX Stages
- Role Profiles
- Overview of Special Capabilities

C-Scope

C-Scope Customer Experience Analytics Platform

The CX Toolkit refers to the C-Scope platform in a number of places. C-Scope is a sophisticated technology platform combined with KPMG analytics capability (people) that aids the identification of cross-channel customer experience issues.

The platform is currently in Beta testing. For further details please contact the Customer Centre of Excellence Service Desk for more information or to speak to the C-Scope solution leaders:



GO-FM Customer Centre of Excellence
Service Desk

CYCLE

CYCLE PLATFORM

Cycle is a collaborative design management and communication platform for designers, developers and stakeholders in the business that keeps a design project on track from a cost and schedule standpoint that aims to create a more efficient design process by allowing easy collaboration and input into design.

To arrange your project to be set up to use Cycle, please contact Shahn Alware, USA Cycle Solution Manager:



us-advmcsupallist@KPMG.com



www.kpmg.com

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