



salesforce

# Marketing in the New Normal



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## Author:

*The Context Marketing Revolution* (HBR 2020)

*Marketing Automation for Dummies* (Wiley 2013)



# COVID Is The Greatest Change Agent Of Our Decade



**Brian Solis** ✓  
@briansolis

Who's leading the [#DigitalTransformation](#) of your company?



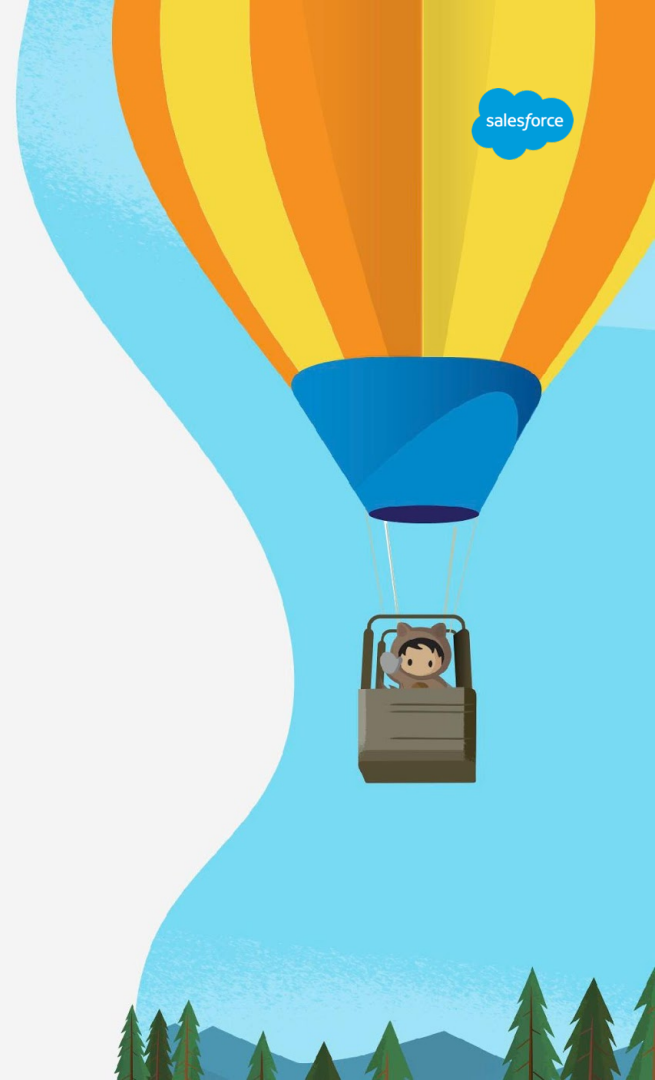


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# What This Presentation Covers

1. **Timelines:** When we can expect to see changes and which signals to look out for.
2. **Consumer Trends:** COVID has created a new consumer, and that consumer will continue to change as we move from stage to stage of recovery.
3. **Marketing's Response:** What marketing can do now, and what we should be planning for to drive the fastest recovery.

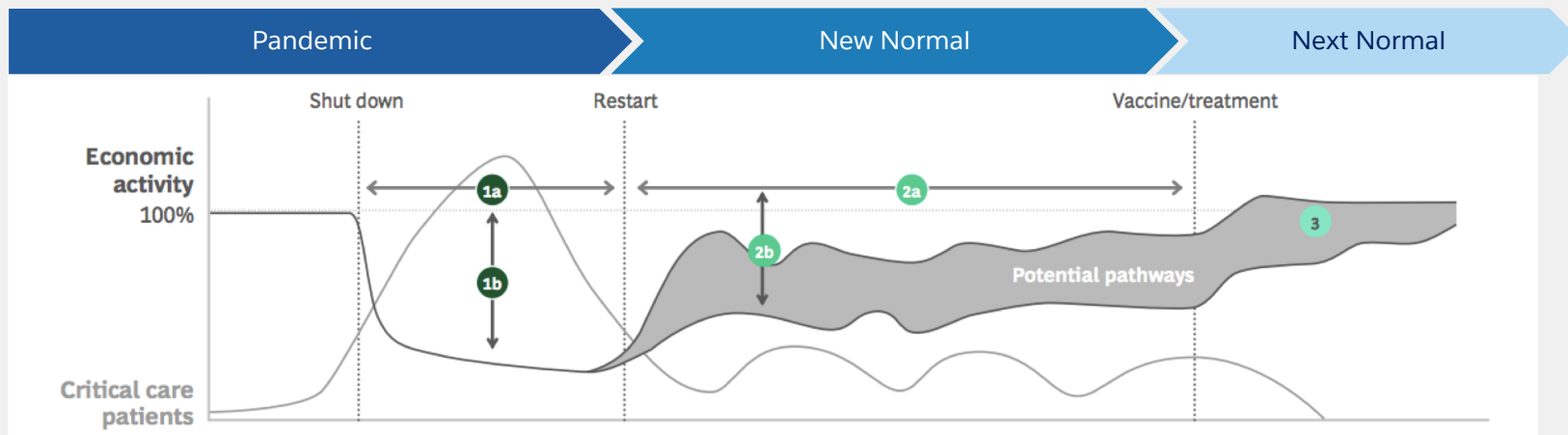




# Time Frames

What the road to Next Normal may look like

# The New Normal, Recovery, and Next Normal

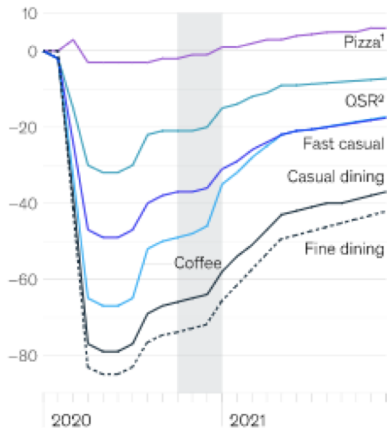


**New Normal:** Begins when the country begins to reopen and lasts until a substantial group of businesses are back to pre-COVID levels.

**Recovery:** Begins when the economic signals become positive again. It will take place within the New Normal time frame and extend into Next Normal.

**Next Normal:** Begins after we have reached the prior economic levels. This is the world in which we have fully embraced new behaviors.

Projected sales by restaurant type in scenario A1, % change from 2019



PIZZA  
Q4 2020  
return to  
precrisis level

FINE DINING  
Q2 2024  
return to  
precrisis level

## Timelines Vary for New Normal, Recovery, and Next Normal

**McKinsey:** Recovery to begin 4 months past bans being lifted, but some restaurants will take 48 months to reach pre-COVID levels

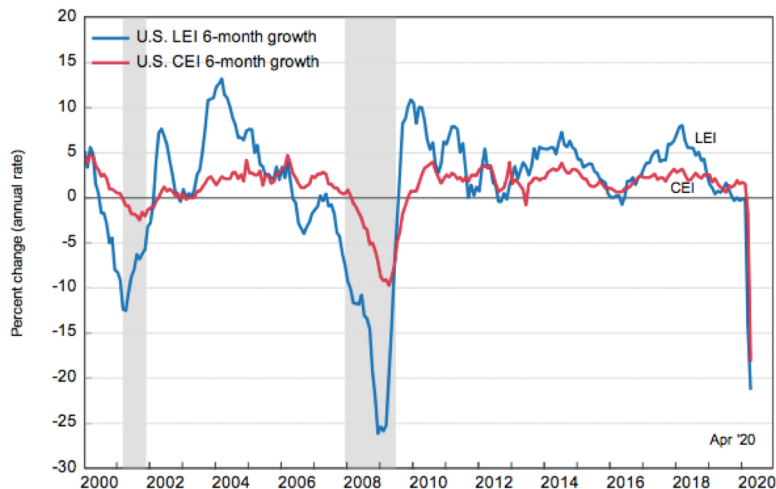
**BCG:** New Normal to last 12-24 months

**IDC:** 12-18 months for travel and tourism

**Coresight:** 62.2% of respondents now expect the severe impact of the outbreak to last more than 6 months from its start (meaning New Normal begins in July/Aug 2020)



# Recovery Signals to Look for



Latest LEI Trough March 2009, Latest CEI Trough June 2009  
Shaded areas represent recessions as determined by the NBER Business Cycle Dating Committee.  
Source: The Conference Board

**Consumer Confidence Index:** We will need to see a sustained double-digit improvement of the CCI. Currently (May 26) it is at 86.6 (0.9+).

**Consumer Present Situation Index:** Currently 71.1 (May 20) compared to 173.9 in January 2020.

**The Conference Board Employment Trends Index:** Currently 43.43 (down 60 points from April 19). This number will also need to have a sustained double-digit increase.





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# Next Normal Signals to Look for

The following numbers will indicate entrance to the Next Normal time frame.

## Consumer Confidence

**Index:** Needs to reach 130, last seen in February 2020.

Currently sitting at 86.

## Consumer Present

**Situation Index:** Needs to reach 165, last seen in February 2020. Currently

sitting at 71.

## The Conference Board Employment Trends

**Index:** Should be close to 100. Currently sitting at 43.

*There are likely going to be waves of uncertainty as we move forward. It is highly likely there will be peaks, then regressions cycling through the New Normal, until a vaccine, herd immunity, or government programs can ensure safety. Just because we have months of sustained progress does not signal next stage. We must reach previous levels to be sure. These are also macroeconomic numbers, and your industry may reach relevant thresholds sooner or later, depending.*



# The New Consumer

Our new world has created a new consumer,  
complete with new demands

# Safety Still the Priority in the New Normal

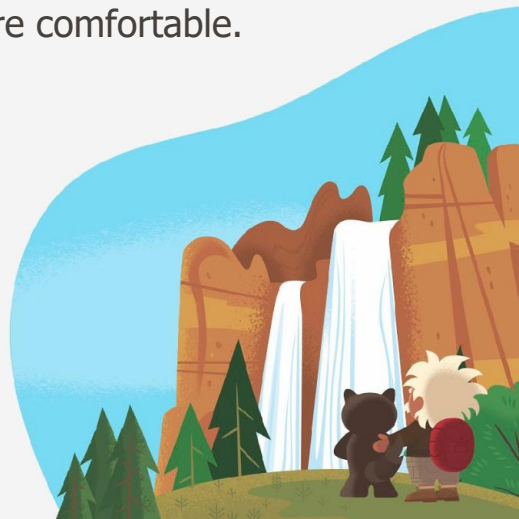
**Businesses Need Protocols for Cleaning:** 81% of consumers said habitually cleaning high-traffic surfaces would make them feel more comfortable in businesses. This option received the highest percentage of all options, followed by more hand sanitizer stations.

Requiring employees to wear masks, limiting capacity in stores, having specific hours for the vulnerable, and requiring customers to wear masks all make customers more comfortable.

Source: Morning Consult Survey of 2000 US Consumers May 14.

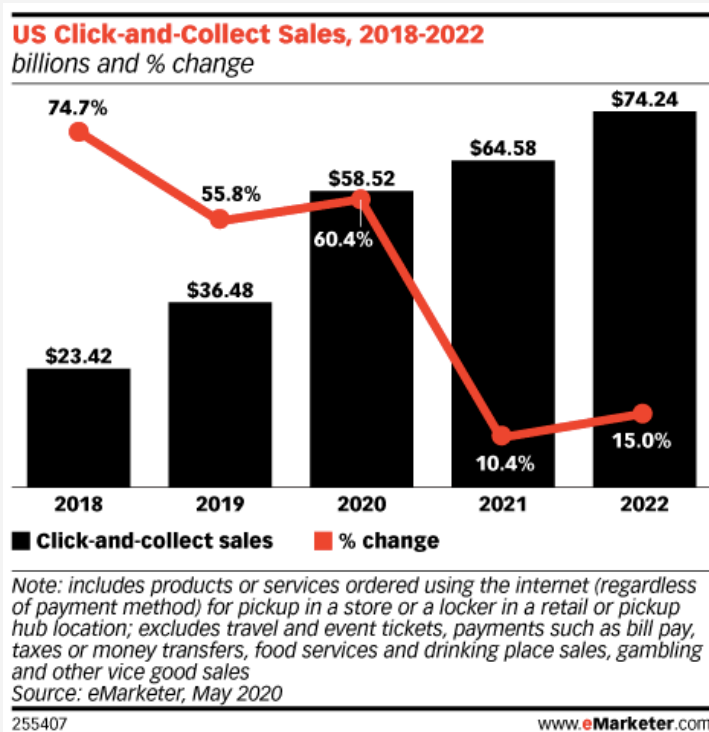
**Consumers Will Avoid / Distance For 6 Months:** Almost 40% of consumers expect to take avoidance action for more than six months. Among consumers expecting to retain changed behaviors, around 60.4% expect to have less physical interaction in the New Normal.

Source Coresight Research





# Safety Creates New Consumer Expectations



## Buy Online, Pick Up in Store (BOPIS)

In Q1, sites with BOPIS grew their digital revenue twice as fast as those who didn't offer BOPIS.

Between March 10 and March 20, daily digital revenue spend for sites offering BOPIS – via curbside, car, drive-through, or store pickup – **grew by 92% compared to 19% for sites not offering it over the same period.**

## Contactless Checkout

- Online orders using a mobile wallet grew by 39% in Q1, representing 26% of all digital orders – SFDC
- American Express study reported that 58% of consumers are more likely to use contactless payments now than ever before



# Consumers Are Focused on Health



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**“We're pretty confident that anything in the space of health and wellbeing is going to enjoy sustained strength.”**

—Alan Jope, CEO of Unilever

## Physical Health

40% of respondents exercised at home for the first time. 37% of all survey participants indicated they would work out more after COVID-19, and over **50% of them said they are motivated to do so by a renewed appreciation for their health and well-being.**

Source: <http://www.harrisonco.com/>

## Telehealth

**There has been a 4X increase in the use of telehealth during COVID,** and this is only the beginning. In 2019, only 11% of US consumers used telehealth, compared with 46% today.

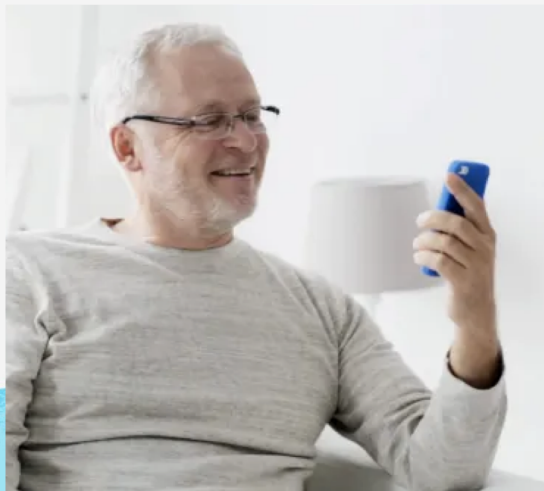
But more important is that, when asked, **76% expect to use it in the future.**

Source: [McKinsey & Company](#)



# A New Digital Baseline

The number of consumers who now use digital channels has increased by an average of 20-25%. And first-time digital consumers account for almost 40% of the growth in digital goods and services.



600 million daily video meeting participants (MS Team/Zoom) = **1 in 13 of world population**

Google Hangouts: 60% daily increase (**25x more use than in January**)

**20% more groceries were bought online than in-store** for the first time in history.

**e-Commerce more than doubled from 13% to 30%**— a threshold projected for 2025.

# More Reliant on Social Media

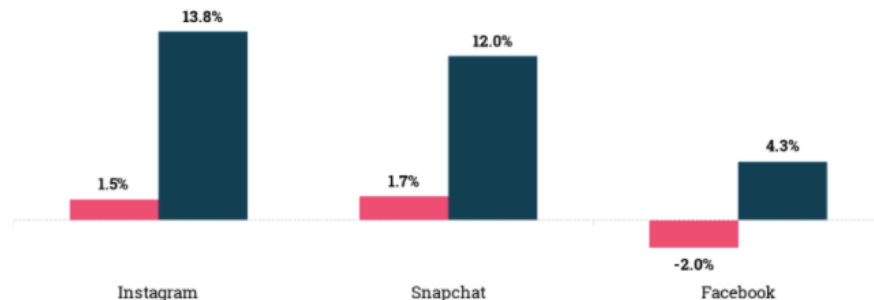
Consumers spent much of their COVID time on social channels, which is projected to stick. To reach new customers, brands should focus on social commerce and social advertising, in addition to organic methods.

## Forecast Social Media Usage Growth in 2020

% year-over-year increases in daily time spent, among US adult users of the social platforms

marketing  
charts

■ November 2019 forecast ■ April 2020 forecast



Published on MarketingCharts.com in May 2020 | Data Source: eMarketer

Among US adults ages 18 and older who use each social network at least once per month

Time spent includes usage all time spent irrespective of multitasking or device used

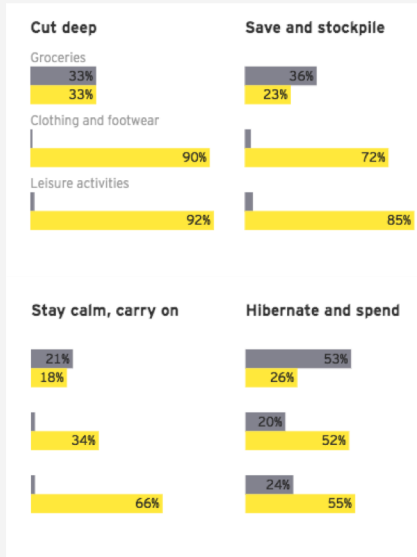
During COVID there was **a 4X increase in Google searches for “data plan upgrade.”**

Total time on mobile devices in 2019 was 3 hours, 10 minutes per day. Post COVID, the average **US consumer spends 1 hour and 20 minutes on social media alone (42% of total time on devices).**

That time on social media is also driving commerce. Social traffic accounted for 8% of retail traffic to sites. **That is 47% YOY growth.**

# Price Sensitivity & Discount Shopping Vary

Products sold on discount hit an all-time high (45%) during the pandemic, settling to around 30%. (Compare that with 29%, the percentage of products sold at a discount on Cyber Monday.)



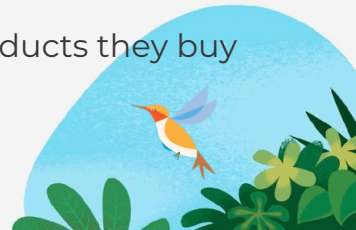
Not all consumers are spending or shopping the same way. EY has come up with four unique personas based on new spending patterns:

**Cut deep:** Mainly over 45 years old, 78% shopping less frequently, 64% only buying essentials.

**Stay calm, carry on:** Do not feel affected, not much change in spending.

**Save & stockpile:** More than one-third (36%) are now spending more on groceries, while most are spending less on clothing (72%) and leisure (85%).

**Hibernate & spend:** Primarily aged 18-44, 42% say the products they buy have changed significantly.



# Expect Trading Down & Loyalty Shock

**Trading Down:** When consumers move down a level of luxury because of a tighter budget.

**Loyalty shock:** Occurs when product scarcity or a tight budget spurs the trial of new brands. Because many of those new trials will be successful, loyalty to the former brand decreases.

**McKinsey found that 30-40% of consumers have been trying new brands and products.** Half of these consumers switch because their desired product is unavailable; an additional 19% purchased a cheaper available options.

**Lasting effect: Of the consumers who switched brands, 12% expect to continue purchasing the new brands after the pandemic.** (Household brands purchased during the last downturn saw a sustained 10% rise post 2008.)





# Nesting Is the New Normal



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Consumers are going to be staying home much more due to safety, financial insecurity, and renewed joy in the simple pleasures of cooking and staying in.

**Profitero reported that searches for “bread machines” rose 13X and “board games” rose 6X normal volume in the first two weeks of April.**

As of June 1, 67.1% of all respondents anticipated avoiding public places or travel after lockdowns end, down from 75.2% the week prior, and 76% in May.

—Coresight Research

“Staying in is the new going out,” according to the McKinsey report. “Once restrictions are lifted, we expect consumers to continue spending more time at home, driven by a desire to save money, persistent safety concerns, and a new-found pleasure in nesting.”



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# Work from Home Is Here to Stay

## Everyone Was Forced To Try It

Various reports show about **63% of the US workforce is working from home** currently—or had worked from home during the outbreak. Three in five (59%) members of this group would prefer to continue working remotely.

## It's Proven To Be More Efficient For Many

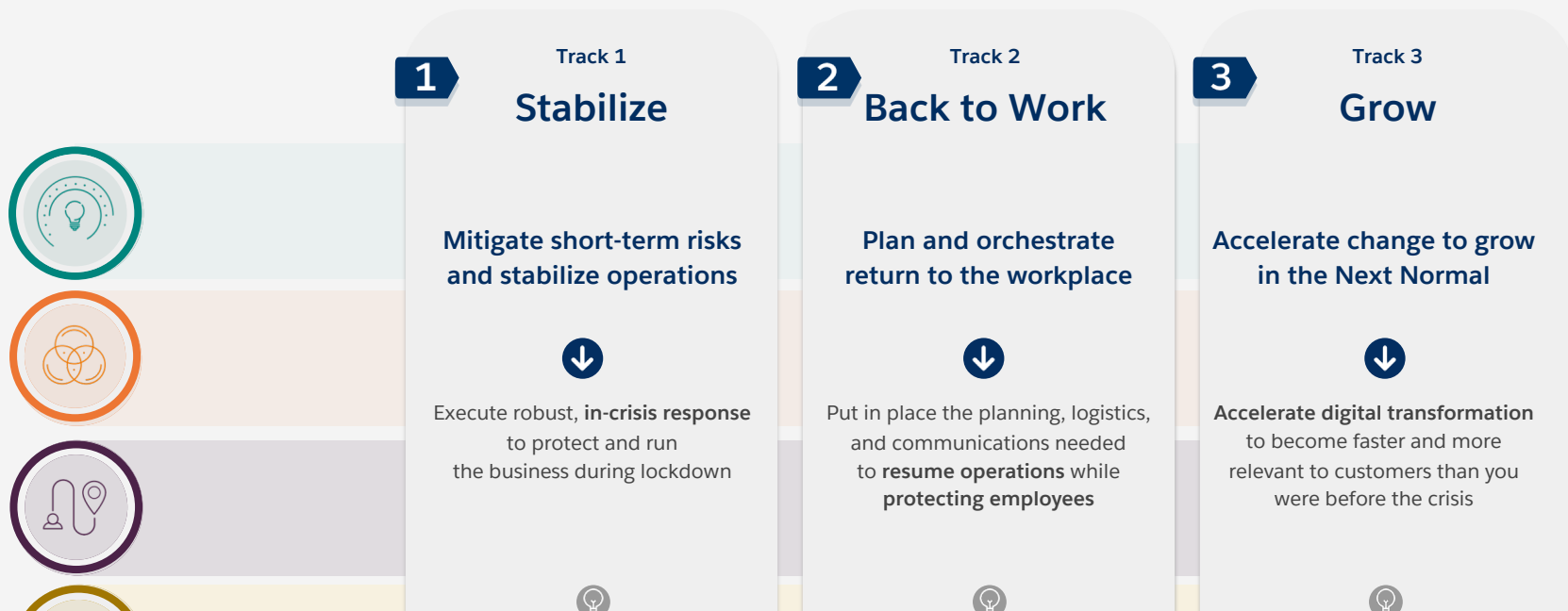
Prior to the pandemic, debates had raged about WFH efficiency, but it has been proven that many people are more efficient in this new setting: **78% of employees reported greater productivity** (Gallop), and 1/3 of all B2B sales organizations said they are more efficient in the WFH structure.





# Affects to The Business Buyer

Like consumers, not all businesses are in the same situation, responding the same way, or seeking the same pathway forward. Think of business recovery in three stages. You must meet consumers in their stage of recovery to break through.



# 1 Stabilize

Mitigate short-term risks and stabilize operations



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## How You Make Decisions

### Establish a Crisis Command Center

Establish stabilization team, war room, and plan. Gather the right insights (data, feedback, and scenarios) to plan and iterate your response.

### Make swift resource decisions

Re-prioritize effort, focusing time and resources on new urgencies, reinforcing key initiatives with sufficient bandwidth.

### Establish a data culture across the company

Build and distribute reusable data sets and dashboards to enable faster decision-making, including customer lifetime value and accountability performance matrix.



## How You Work

### Define and execute the Stabilize work plan

Define and communicate the work plan, making it easy to provide feedback; reinforce leadership transparency and visibility.

### Rebuild employee productivity

Ensure remote connectivity; streamline workflows and automate overly inefficient processes; implement training for new tools and processes.

### Support employee wellness

Supercharge employee help portal with information to clarify employee support programs and resources; create a communications cadence of insights and advice to employees.



## How You Engage Customers

### Rapidly engage priority customers

Make it easy for customers to reach you digitally; prioritize outreach based on need and lifetime value; analyze changing needs.

### Realign value propositions with customer priorities

Rapidly innovate offerings and messaging to better serve immediate customer needs.

### Optimize your digital engagement model

Increase performance of existing digital programs to generate scale and response effectiveness.



## How You Serve Society

### Prioritize goals and shift resources to new needs

Build in-crisis plan; redeploy resources based on strengths; create a program for donations, grant management, and pro bono efforts.

### Mobilize your workforce to volunteer

Enable employee giving to focus on highest impact areas; update volunteering protocols, and partner with trusted organizations.

### Communicate transparently, track impact, and iterate

Clearly communicate how your business is a platform for change; develop a giving dashboard to monitor impact; support ERGs.

# 2 Back to Work

Plan and orchestrate return to the workplace



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## How You Make Decisions

### Establish Back to Work Command Center

Build back to work team and mobile command center; gather key data to help with planning; partner to resolve tough questions.

### Build Back to Work plan

Build unified Back to Work plan, defining mobilization, logistics, and support plan; define overall workplace policies, especially around COVID-proofing and containment reactivation.

### Unify Back to Work feedback and decision-making

Orchestrate return to work with a single source of truth; augment insights through multiple feedback loops; communicate liberally.



## How You Work

### Execute staged Back to Work plan

Cascade Back to Work plan, targeting communications according to needs/situation; review and adopt workforce protection regulations.

### Enable employees with tools for Back to Work paradigm

Activate multiple channels for employees to get information (portals, training), provide feedback (hotline), and get help (wellness tools).

### Return to work with greater flexibility

Enable increased work flexibility, including staggered shifts; take account of parental needs; optimize hiring and skills decisions.



## How You Engage Customers

### Deeply understand changing customer needs

Deepen listening programs to identify evolving buying and service experience needs.

### Rebuild trust through personalized experiences

Redesign simpler, more personalized, and more automated experiences; enable employees with training and scripts.

### Cultivate robust ecosystem resilience

Deepen partner and supplier relationships through enhanced collaboration, play books, and processes.



## How You Serve Society

### Demonstrate empathy within your community

Empower and enable teams to serve local needs, and form local partnerships; invest in and communicate impact locally and transparently.

### Operationalize your culture of giving

Create programs for volunteer management and expand grant management; commit to equality enhancing programs.

### Double down on sustainability as you emerge from the crisis

Establish sustainability as a key decision factor in all post-crisis investments, including real estate.

# 3 Grow

## Accelerate change to grow in the Next Normal



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### How You Make Decisions

#### Establish Next Normal Transformation Office

Create Office of Transformation; publish CEO-level vision as true north; align leadership.

#### Define the target digital operating model

Build target digital operating model to unify IT and business, with clear digital governance model; unlock value of data; automate for speed.

#### Continuously sense change and respond with agility

Define and enable business performance matrix, including new KPIs for experience; augment gathering of customer and employee feedback.



### How You Work

#### Supercharge employee productivity

Leverage growth industry best practices; simplify finding answers; enable citizen developers; automate onerous processes.

#### Enable lifelong learning and development

Enable company-wide skills analysis; simplify learning with tailored online learning journeys; upgrade re-skilling and source for diversity.

#### Foster an employee-friendly workplace and culture

Create multiple avenues for employee feedback; enhance focus on community and work environment; evolve wellness resources to serve aging workforce and mental health issues.



### How You Engage Customers

#### Redesign business processes to be customer-centric

Audit and redesign business processes to differentiate based on speed and simplicity in serving the customer's "job to be done."

#### Enable the full power of your company

Enable one team to serve the customer through single source of truth and customer journeys; supercharge partners and suppliers.

#### Innovate at the speed of market change

Sense change rapidly in the market and respond with agility, enabling the business to deploy new digital capabilities at speed.



### How You Serve Society

#### Connect doing good for the world with doing well as a business

Measure and report your societal impact, including as part of earnings.

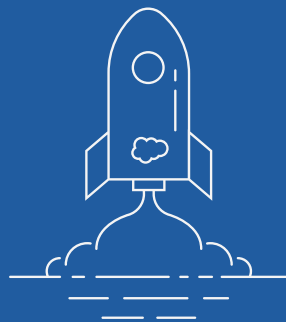
#### Be a platform for change in the world

Orchestrate action, via partnerships, to engage executives and employees around UN SDGs; spotlight heroes to generate momentum.

#### Triple-down on sustainability for the long term

Appoint a Chief Impact Officer, develop a net zero plan, and execute.

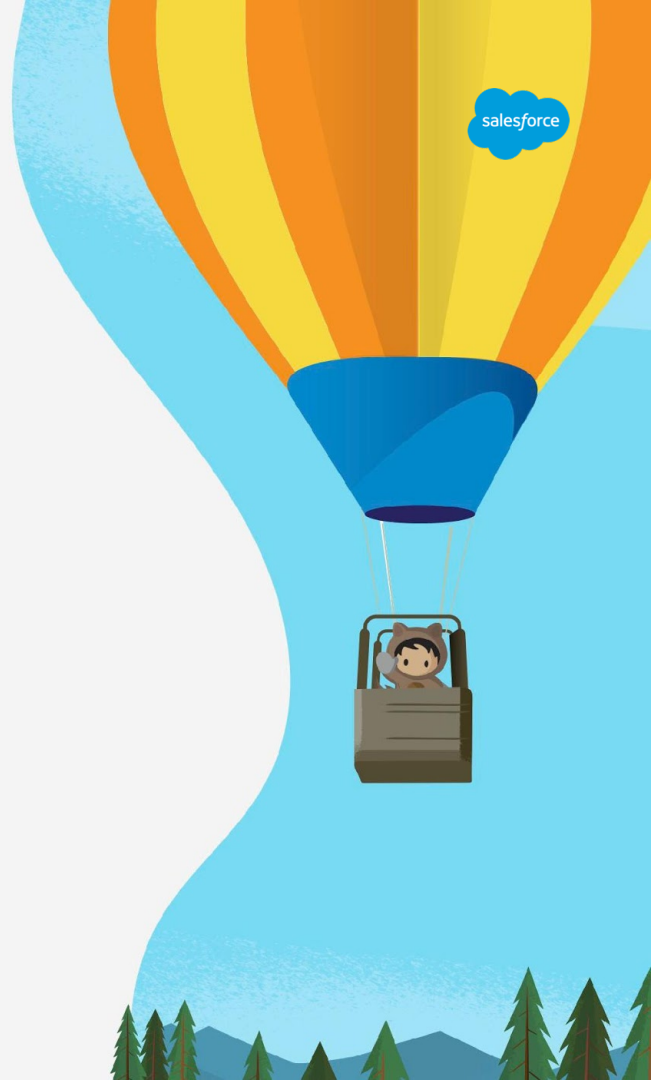
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# MARKETING'S RESPONSE

# Marketing's Response to the New Normal

1. **Further Agile Efforts** – Not just agile process, but agile structure and team. As well as persona's.
2. **Adapt Messaging** – to each micro stage and persona
3. **Evolve Your Brand** – a new world needs new brands
4. **Expand Self Service** – new consumer demands
5. **Enable the Citizen Marketer** – scaling the human
6. **Events In The New Normal** – a look at what is working and where to plan your events.



# Embrace Agile at All Levels

**Agile Work Flow:** The only way to pivot and navigate the constantly shifting landscape is to follow agile work flows of building. This means a focus on talking to customers, testing ideas, and iterating based on data.

**Agile Team Structure:** Agile organizational structure is much less popular, yet it is a key to minimizing operational overhead while maximizing marketing returns.

An agile-squad model can raise a company's metabolic rate.

Hootlet



**Consumer- and market-insights squad**

Central hub for monitoring changes in consumer sentiment/behavior, market and regulations  
Feeds information to other squads and enables quick response to market changes



**Marketing cash-liberation squad**

Prioritizes immediate review of cost base and budget  
Contributes to company stability & other marketing efforts (eg, communications)



**Growth squad**

Shares in-market learnings hub  
Identifies and prioritizes sales green shoots  
Optimizes channel management (eg, actions to be taken with offline retailers, inventory / stock management)



**Digital marketing and sales squad**

Adapts current digital M&S activities to new reality (eg, digital marketing)  
Builds / evolves digital selling platforms (D2C or through partners)



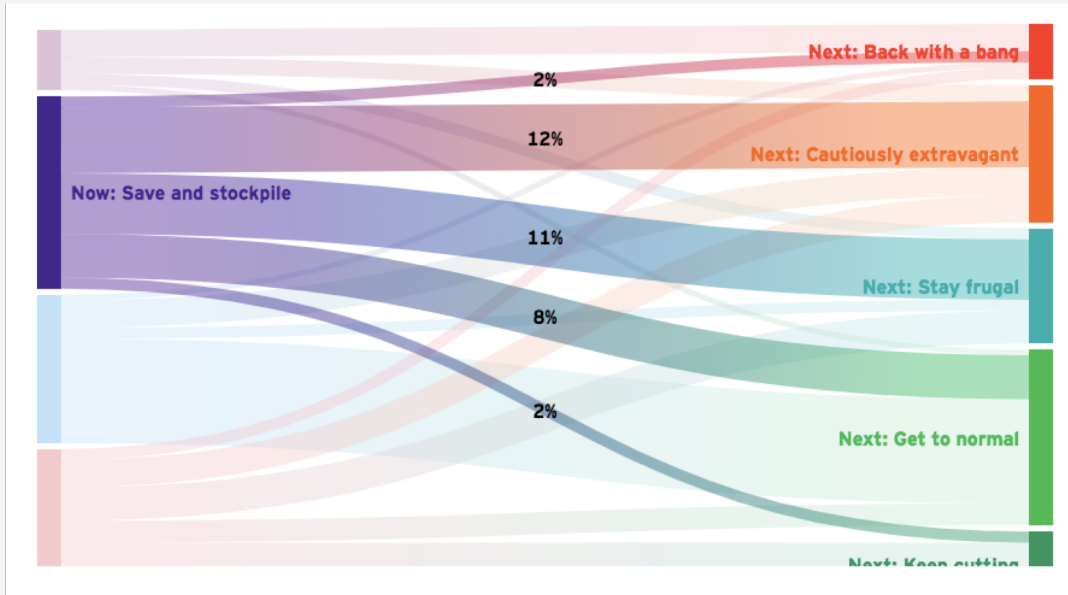
**Post-COVID-19 growth squad**

Develops clear plan for next normal  
Balances resourcing with short-term squad

McKinsey  
& Company

# Be Agile with Customer Personas

Customer personas are rapidly changing and will change again as we enter the Next Normal. Keep up with changes through relentless customer conversations.



## EY Predicts These Four Next Normal Personas

- Get to Normal (31%)
- Cautiously Extravagant (25%)
- Stay Frugal (22%)
- Keep Cutting (13%)
- Back with a Bang (9%)





# Relentless Customer Conversations

Three days a week at 7:00 am, senior Procter & Gamble executives check in with each other about their customers: what they're buying, how their needs are changing, and whether the company's products are hitting the mark (CNN).

## Daily Stand-Ups

Stand-ups create a daily flow of real-time issues from the ground up. Stand-ups must answer three things:

1. What did you do yesterday
2. What are you doing today
3. Any roadblocks in your way

Each stand-up manager attends two stand-ups, gathering info from their reports and passing it to their manager.

## Daily/Weekly Calls

Identify key information sources and ensure you have daily calls with them. These sources could be analysts, key customers, government officials, key groups of customers, etc.

Schedule a weekly call with your full team and have each sub-team report on progress. Fast paced, full call should take 30 min.

## Internal Data Feed(s)

There should be real-time data feeds of information for various teams, projects, and information. Real-time and collaborative are key.

### Ex Format:

Slack Channels, Chatter Group, Google Doc, MS Team, Quip

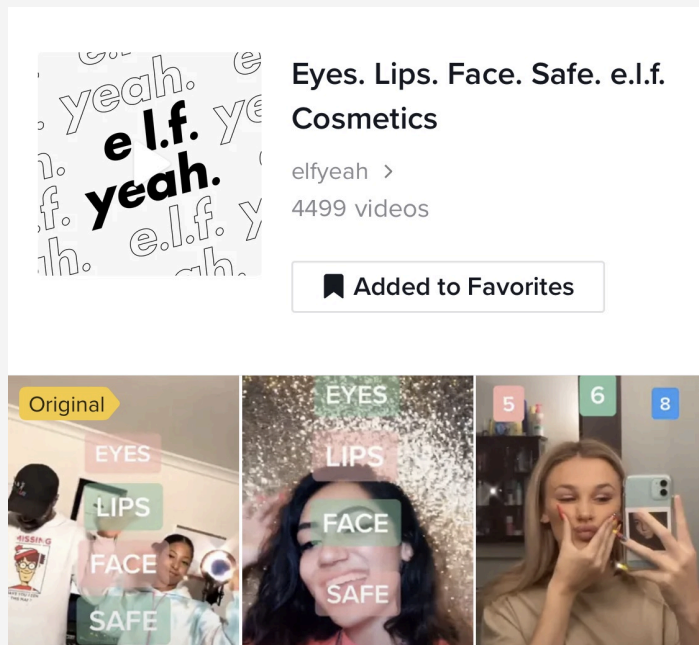
### Ex Content:

Daily analyst reports, customer stories, project collaboration, success stories



# e.l.f. Cosmetics Listens, Tests, Responds

e.l.f. created a new social handle, @elfyeah, as a test-and-learn place for content development. This process led to the creation of the #eyeslipsface challenge, **which garnered a whopping 5.3 billion views**.



“Our focus is always around what it is that they want to feel, what it is they want to learn. We’ve had a surge in requests for beginner tutorials and more education. So, we spent a lot of time going back to the basics.”

“In this moment they love pops of color and surprising moments—things that make them happy.”

—Kory Marchisotto, CMO of e.l.f. Cosmetics





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# Messaging Changes with Micro Stages

Within the larger framework, there will be many micro stages where messaging must change. This requires a very fast and agile marketing team, able to listen and respond nearly in real time. This is a muscle you must develop now, as it will be critical moving forward.

## Beginning (Feb-March)

**Inform** – help your audience understand what they need to do: wash hands, maintain social distancing.

**Unity** – show unity by separating brand logos and using images of distance.

## Lock Down (March-May)

**Solidarity** – social distancing is hard; show how you are standing with them.

**Heroes** – show your support for front-line workers.

**Inspire** – entertain, inspire, and help give them something to do during lock down.

## Reopening (April-July)

**Recommit** – as you move to reopen, remind your audience what you stand for.

**Open for business** – create simple messages about being open and how you are keeping employees and customers safe.

## Recovery Begins (July->)

**Purpose** – focus on a purpose beyond your product.

**Real-time** – operate real-time/ fast advertising.

**Inspire** – support a New Normal lifestyle and inspire greatness within it.





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# Purpose Is More Than Words

50% of the CEOs surveyed said they believed the pandemic would accelerate the move toward stakeholder capitalism to address the human suffering caused by the crisis.

– Fortune



## Nike: Play Inside, Play for the World

- Opened up free courses in premium app
- Built community via livestream master workouts
- Created kids activities
- Living Room Cup – WFH competition

## Salesforce: Leading Through Change

- Focused on B2B audience
- Provided thought leadership from world's biggest business names
- Focused on better business, better health—not the product



# DTC / House Brands on the Rise

25% of consumers tried private-label brands for the first time during the pandemic crisis. At least 30% of those who tried them plan to stick with them.

## DTC

Nestle's global e-commerce sales shot up 30% in the first three months of 2020.

Procter & Gamble reported 35% growth in online sales over the same period.

## Private Label

Private labels made up 16% of the market before the pandemic, up two percentage points since 2014, according to market research firm [IRI](#).

Since the start of the pandemic in the US, private-label sales grew **29%**, **outpacing regular-branded product sales, which grew by 24%**, according to the most recent data from Nielsen.



*Target recently launched Good & Gather, a food and beverage brand the retailer expects will become its biggest store line.*

# Invest in Experience Infrastructure

Shifting TV ad dollars to digital video and e-commerce. TV spend is likely to be down 23-29% from 2019, with wise brands shifting that spend to experiences and digital efforts.



A General Mills spokesperson told *WSJ* that the company was shifting TV ad dollars to digital video and e-commerce. And for many **it's not perceived as a temporary backup plan, but a viable strategy for the future:** Half (50%) of the respondents to the Advertiser Perceptions survey said they felt it was possible to replace linear TV reach with OTT/CTV and digital video ads.



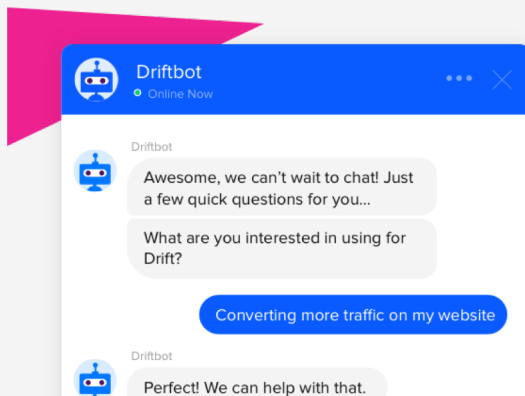
# Expand Self-Service Offerings

## BOPIS

According to our latest forecast, US e-commerce click-and-collect sales jumped 74.7% to \$23.42 billion in 2018 and 55.8% to \$36.48 billion in 2019. Due to increased demand for click-and-collect amid the pandemic, we expect sales to surge 60.4% to \$58.52 billion in 2020, up from a prior estimate of 38.6% growth.

## Conversational Marketing

20 billion monthly messages were sent between people and businesses as of 2019, which is **2.5 times more** YoY compared to Q2 2018.



## e-Commerce

An April 2020 report from Adtaxi found that 56% of respondents report shopping online more now than ever before, and—more significantly—**53% plan to do more of their shopping online** after the crisis is over.

All businesses now must become digital-first to meet consumer behavior in the Next Normal.

# Enable the ‘Citizen Marketer’

“Citizen” refers to a normal employee empowered by AI to do 80% of the work of a trained professional. Thus, a “Citizen Analyst” is a general employee able to do digital data analysis at the level of a trained data scientist.



When **The MACIF Group**, a leading French mutual insurance provider, shifted from in-person meetings to more than 1,300 Google Meet video meetings daily, the collaborative virtual rooms facilitated human contact and responsiveness in an unexpected period of remote work.



**Tsingtao**, the Chinese beer brand, recruited more than 40,000 employees and consumers as “Tsingtao social distributors,” who promote products on their own social networks. Sales at Tsingtao’s WeChat store subsequently surged by a factor of three.





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# B2B Doubling Down on ABM

89% of B2B brands have enlisted some form of Account-Based Marketing and are spending, on average, 16% of their total budgets on it. In addition, high performers are spending 30% more on ABM than their underperforming counterparts.

**Shift ABM Targets:** Engage customers in priority order based on (i) need, (ii) Customer Lifetime Value score, (iii) fast ROI.

**Empower Reps with Real-Time Intelligence:** SDR, BDR, and AEs must be empowered with real-time insights on their target accounts so they know whom to reach out to, when, and what to discuss.

**Evolve ABM Past Basic IP Targeting:** The New Normal will also be free of third-party cookies, requiring ABM strategies to be more advanced than simply IP targeting. Look for more advanced ways of collaborating, targeting, and deploying your efforts.



# NYT Plans for 9X Increase YoY of Events

NYT has deconstructed a large event and reconfigured it into a short digital experience. They have increased the frequency by 5X, with the goal of 9X.

*Pre-COVID 40 Events Planned for 2020*

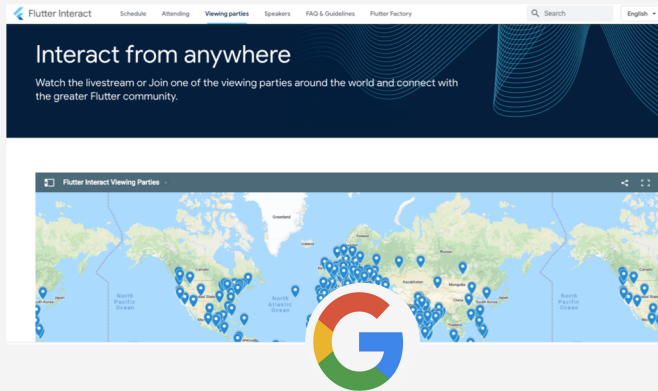


*Post COVID Goal – 1 Per day*



*How They Plan to Meet That Goal*

- Task Force made of 6 cross discipline team members. They meet once a week.
- Transitioned production into 3 person team pods. A Pod is responsible for a series, or event type
- The Task Force created a playbook of beset practices to be shared with all pods



# Viewing Parties Bring The Event To Them

There was already a trend of companies creating view parties for their large brand events. Like the image below from Google Flutter Interact with a map of all of the viewing parties you can join in. This was PRE-COVID.



Salesforce has also leveraged these with our Sydney World Tour. As social distancing eases these will become very popular with teams as they give sales a reason to engage with prospects in a new way.





## The Next Normal in Events

The "Next Normal" will begin at different times for different industries, but it is at least 6-12 months away for most of us. While the future is very uncertain here are a few things we believe we should be preparing for.

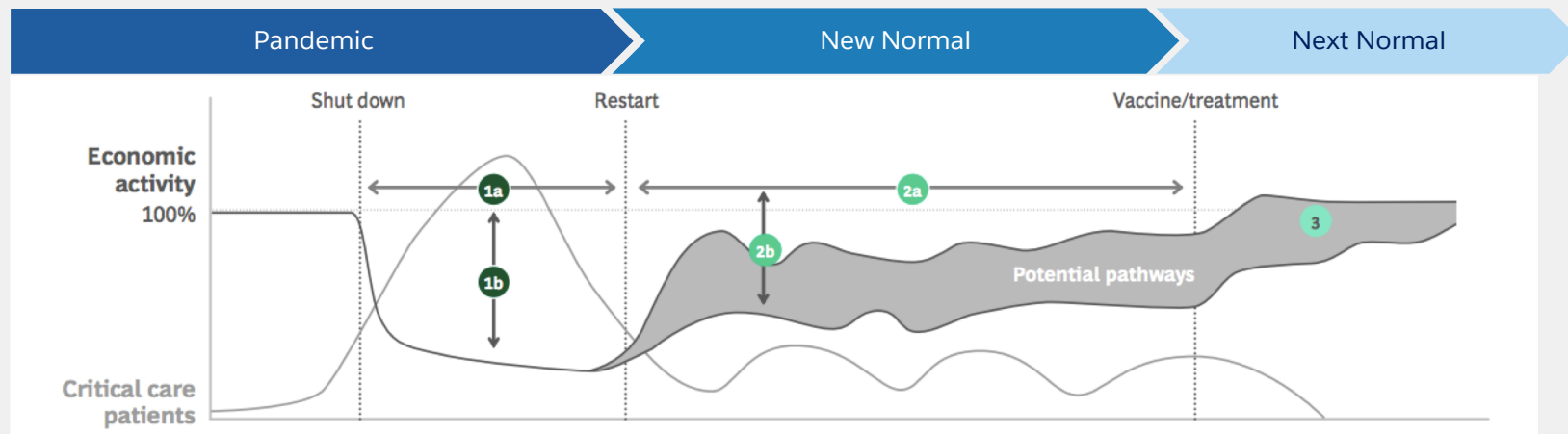
1. Hybrid Events and Multi-Tiered Pricing Models
2. Distributed & Deconstructed Events Continue
3. New Ways To Make Connections
4. A Different Role For Sponsors





# Conclusions

# The New Normal, Recovery, and Next Normal



**New Normal:** Begins when the country begins to reopen and lasts until a substantial group of businesses are back to pre-COVID levels.

**Recovery:** Begins when the economic signals become positive again. It will take place within the New Normal time frame and extend into Next Normal.

**Next Normal:** Begins after we have reached the prior economic levels. This is the world in which we have fully embraced new behaviors.



# The New Normal Consumer



@msweezey

In general, current predictions suggest that consumers will retain 3-6% of their new behaviors. –McKinsey & Company, derived from trends seen now in China

## Digitally Developed

The majority of consumers will now be digital first. They will find products digitally, evaluate them, order, and even embrace new concepts of the digital world, like eSports.

## Brand Fluid

Consumers are price sensitive and trading down when finding products out of stock. They have put their brand loyalty up for grabs because they have to.



## Cautiously Optimistic

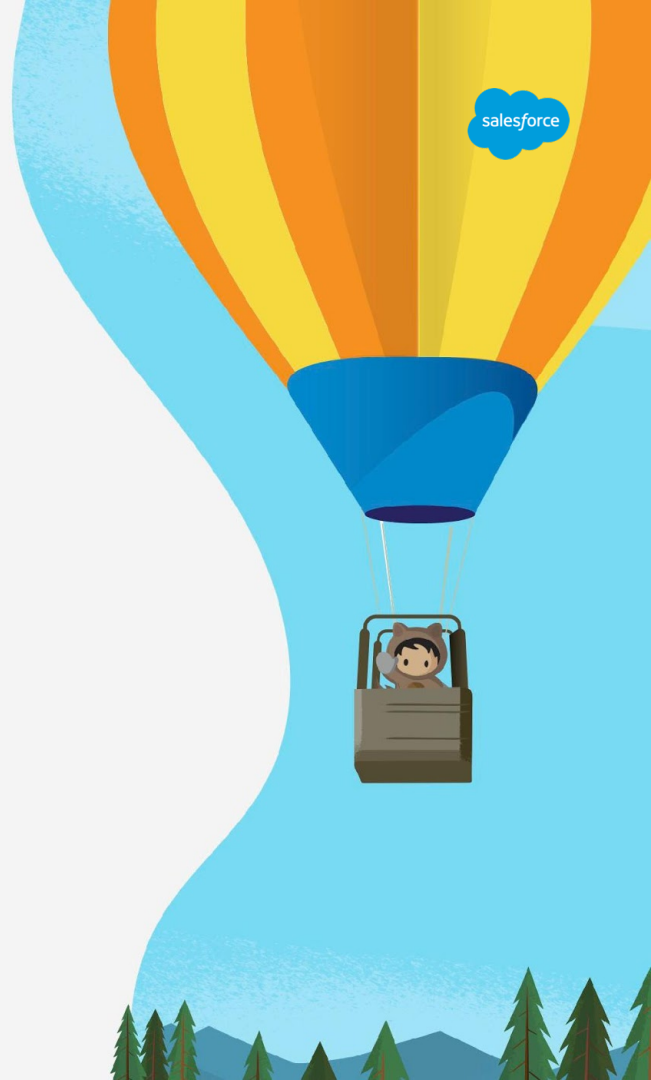
From their concerns about in-store safety to their heightened awareness of personal wellness, consumers are more mindful of their surroundings and actions, while hoping for brighter days. They want recovery, but realize it's going to be a while.

## Comfort Seeking

Consumers will seek products that provide them comfort, will spend more time at home, and will seek stability in new routines.

# Marketing's Response to the New Normal

1. **Further Agile Efforts** – Not just agile process, but agile structure and team. As well as persona's.
2. **Adapt Messaging** – to each micro stage and persona
3. **Evolve Your Brand** – a new world needs new brands
4. **Expand Self Service** – new consumer demands
5. **Enable the Citizen Marketer** – scaling the human element across the customer journey
6. **Events In The New Normal** – Distributed, deconstructed, hybrid, and more human.





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# THANK YOU