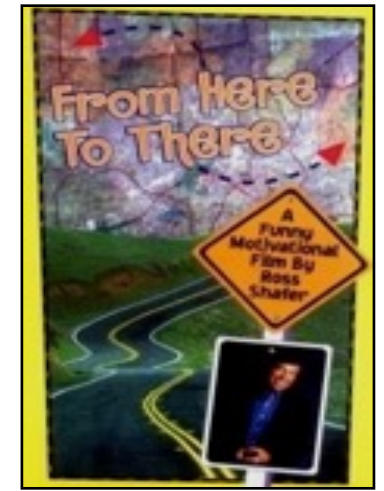
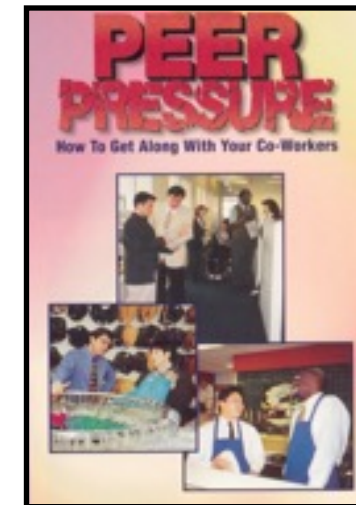
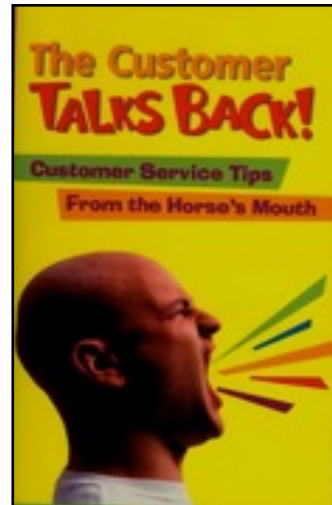
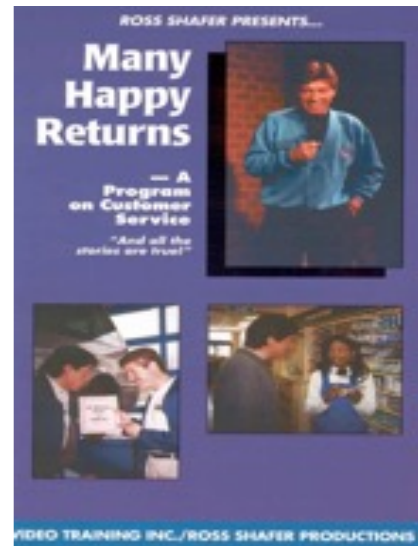
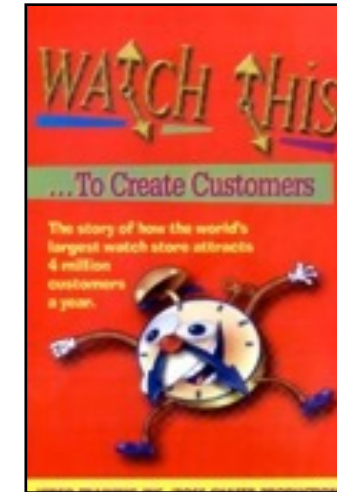
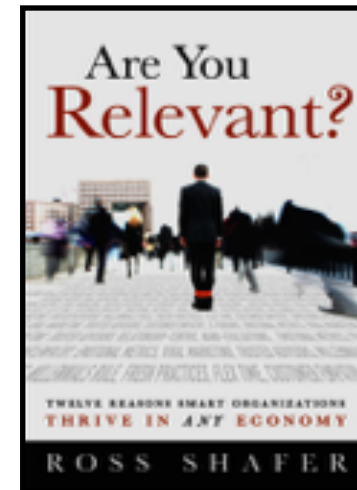
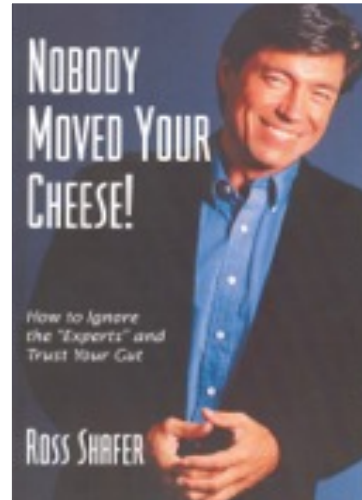
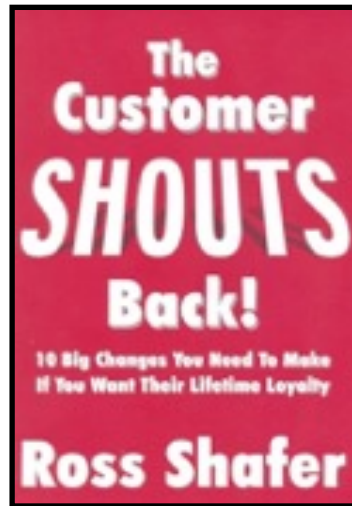
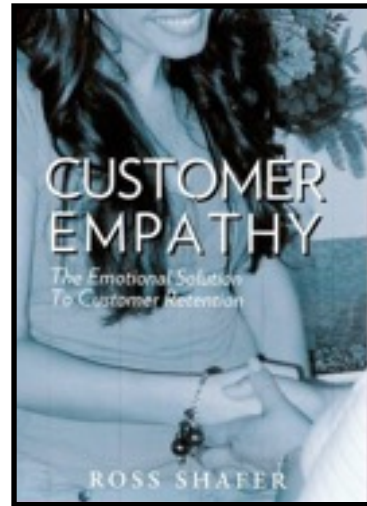




# How Can You Always Stay Relevant?

Ross Shafer



# Are You Relevant?



TWELVE REASONS SMART ORGANIZATIONS  
**THRIVE IN ANY ECONOMY**

**ROSS SHAFER**

# ABSOLUTELY NECESSARY

Bulletproof Tactics That Will  
Put You in High Demand



ROSS SHAFER  
MICHAEL BURGER

MetLife

Xerox



Microsoft



WELLS FARGO



TRW  
GlaxoSmithKline



Hilton



Sprint

Canon

Armstrong

KPMG

AutoZone

Allstate  
You're in good hands.



Honeywell



Marriott  
HOTELS & RESORTS

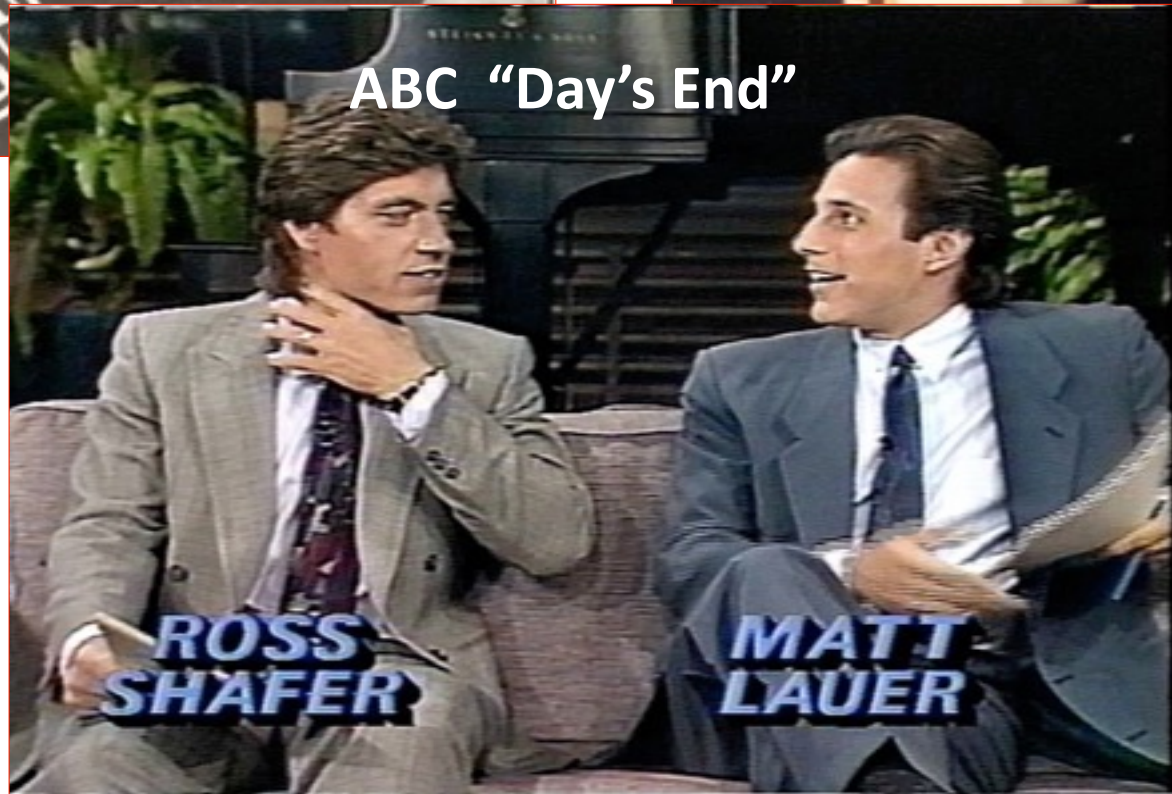
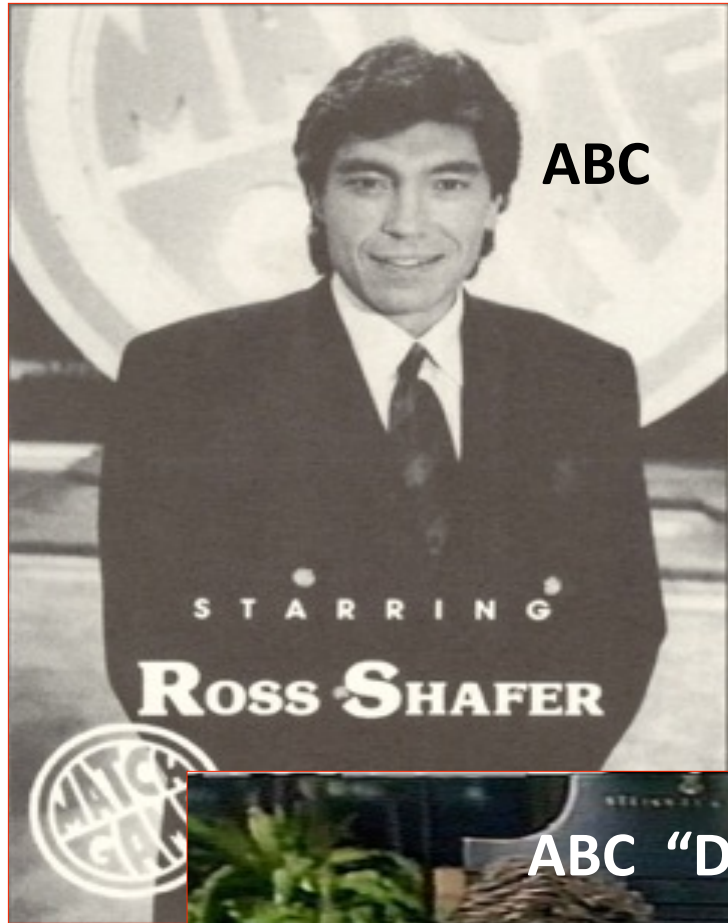
Cargill

FedEx

SYSCO

We Study 18 Different Industries







# **The Culture; in Context** **Leveraging**

# MICRO vs MACRO

- Social Media
- Financial TV
- My Friend's Experience
- "On Demand" Expectations



# COOK-LIKE- A-STUD

\* 38 lip smackin' meals men can prepare  
in the garage ... using their own tools!

Foreword by  
JEFF "THE FRUGAL GOURMET" SMITH

## Ross Shafer





# How Well Do You Know Cultural Trends?

# Women Buy Everything!

**85% of ALL CONSUMER & B2B PURCHASES.**

93% of OTC Pharmaceuticals

92% of Vacation & Business Travel Decisions

91% of New Homes

91% of Consumer Electronics (TV's, phones, tablets, computers)

**89% of Investment Services & Bank Accounts**

86% of I.T. Infrastructure Decisions at work

80% of Healthcare & Dental decisions

73% of New Cars --- (45% of Light Trucks & SUV's)





# She-Commerce

“Women over 50 currently control \$19 trillion in Net Worth...**3/4** of the entire U.S. Financial Wealth.”

# And Female Wealth is Growing...

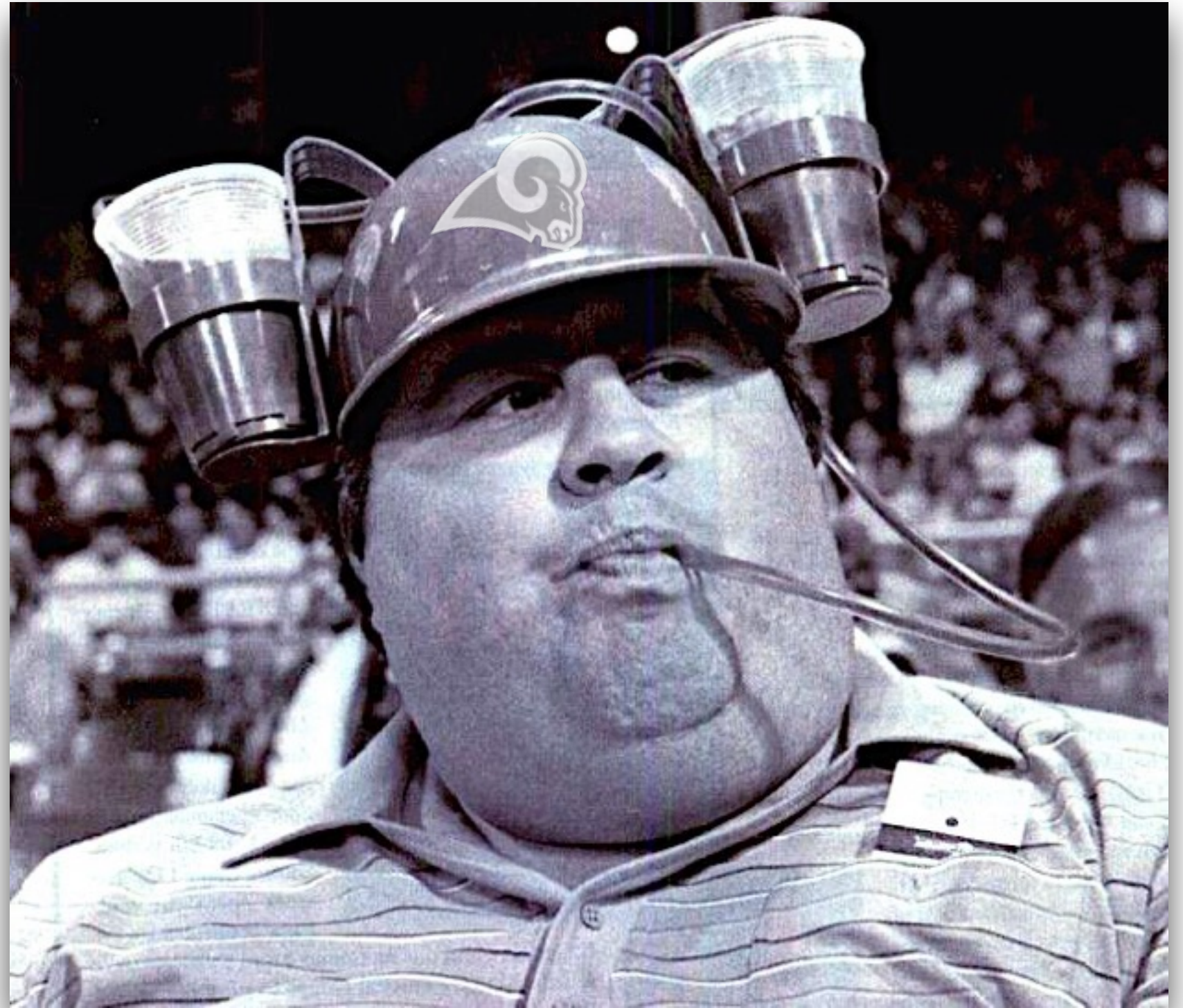
“By 2020, women will control between \$30-\$40 Trillion in U.S. consumer wealth.”

# Women Are Primary INFLUENCERS

**“92% of women will pass along information re: quality and value to their friends....recommending to an average of 21 other people (not counting social media).”**

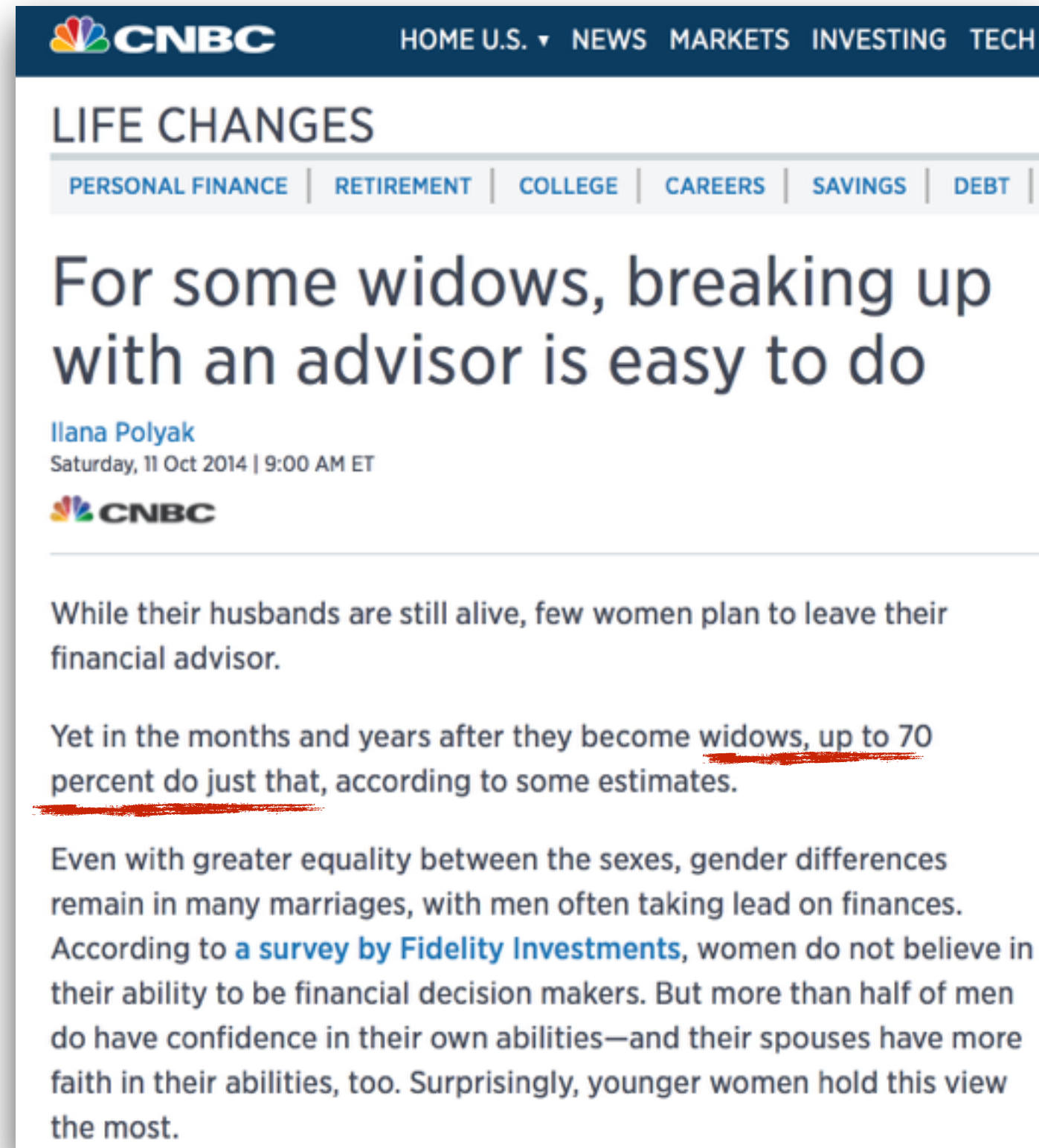


**“Men only  
recommend  
to 2.6 other  
people.”**





# The Widowhood Factor



The image is a screenshot of a CNBC website article. At the top, the CNBC logo is on the left, and navigation links for 'HOME U.S.', 'NEWS', 'MARKETS', 'INVESTING', and 'TECH' are on the right. Below the navigation is a 'LIFE CHANGES' section header, followed by a horizontal menu with links for 'PERSONAL FINANCE', 'RETIREMENT', 'COLLEGE', 'CAREERS', 'SAVINGS', and 'DEBT'. The main article title is 'For some widows, breaking up with an advisor is easy to do' in a large, dark font. Below the title, the author's name 'Ilana Polyak' and the date 'Saturday, 11 Oct 2014 | 9:00 AM ET' are displayed. The CNBC logo appears again below the date. The article text begins with 'While their husbands are still alive, few women plan to leave their financial advisor.' The next paragraph states 'Yet in the months and years after they become widows, up to 70 percent do just that, according to some estimates.' The final paragraph discusses gender differences in financial confidence, mentioning a survey by Fidelity Investments.

**CNBC** HOME U.S. ▾ NEWS MARKETS INVESTING TECH

## LIFE CHANGES

PERSONAL FINANCE | RETIREMENT | COLLEGE | CAREERS | SAVINGS | DEBT |

### For some widows, breaking up with an advisor is easy to do

Ilana Polyak  
Saturday, 11 Oct 2014 | 9:00 AM ET

**CNBC**

While their husbands are still alive, few women plan to leave their financial advisor.

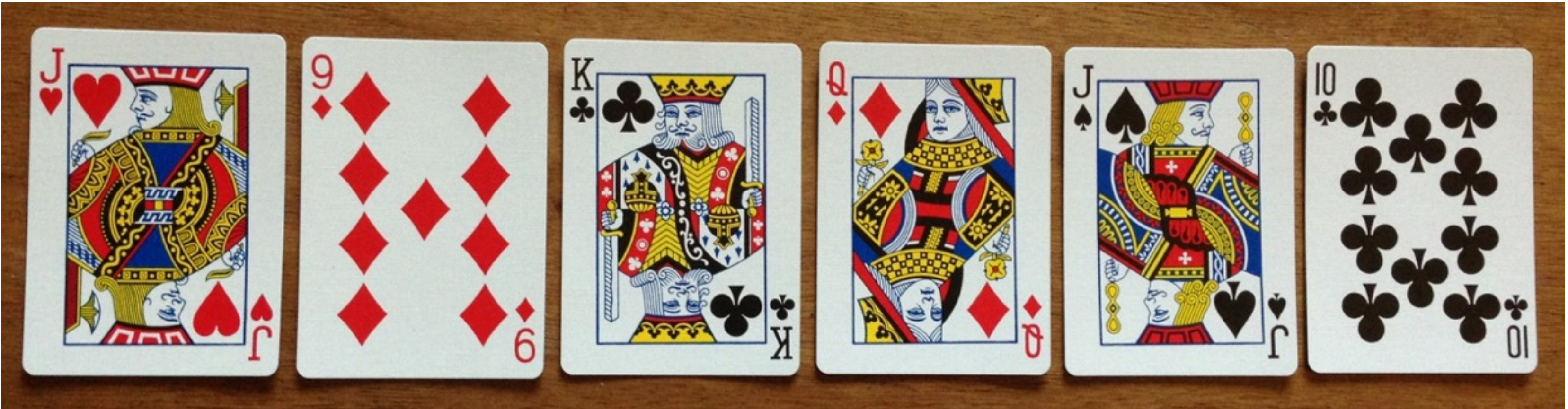
Yet in the months and years after they become widows, up to 70 percent do just that, according to some estimates.

Even with greater equality between the sexes, gender differences remain in many marriages, with men often taking lead on finances. According to a survey by Fidelity Investments, women do not believe in their ability to be financial decision makers. But more than half of men do have confidence in their own abilities—and their spouses have more faith in their abilities, too. Surprisingly, younger women hold this view the most.

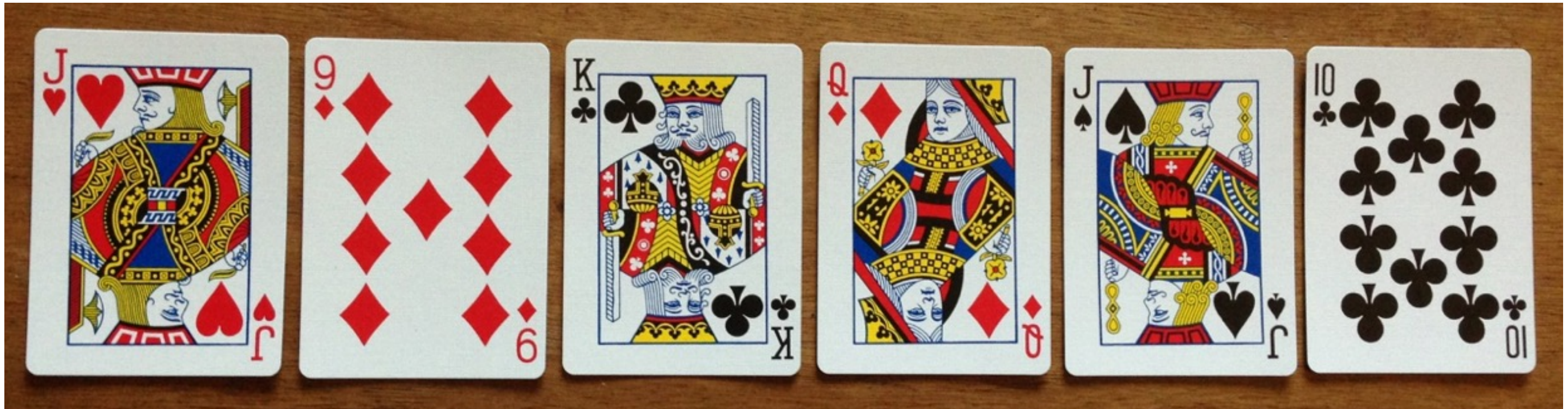


**How Does Your Team  
Keep Innovating?**

**Complacency is NOT  
A Growth Plan**







# Peripheral Vision Prevents Injury



Russell  
Wilson  
sees (3)  
receivers  
AND  
Whitney  
Mercilus

# Tunnel Vision is Real



“Panic, Stress, and Anxiety are the usual suspects for tunnel and blurred vision. This occurs primarily because of a reduction of blood to the brain. ”



# Tunnel Vision is Real



“Panic, Stress, and Anxiety are the usual suspects for tunnel and blurred vision. This occurs primarily because of a reduction of blood to the brain.”


**Get New Ideas  
from the  
WRONG MEETING**

# Today's Events


**FRIDAY** 78° HIGH 78° LOW 68°  
**SATURDAY** 77° HIGH 67° LOW  
**SUNDAY** 76° HIGH 66° LOW  
 9:34

## Events for Friday, Oct. 16, 2015



Group/Event	Room	Start/End
 <b>GENERAL ELECTRIC</b>		
BREAK OUT SESSION: GROUP A	Olympic 1	1:00 PM - 2:45 PM
BREAK OUT SESSION: GROUP B	Evergreen 3 & 4	3:25 PM - 5:00 PM
BREAK OUT SESSION: GROUP C	Cascade 7 & 8	3:25 PM - 5:00 PM
 <b>RAYTHEON</b>		
RAYTHEON SIX SIGMA	Cascade 1	8:30 AM - 4:30 PM
 <b>Home Depot</b>		
Awards Committee	Maxis Ballroom	10:00 AM - 11:00 AM
<b>Morrow Technologies</b>		
Client Appreciation Lunch	Grand Ballroom 1 & 2	11:30 AM - 1:30 PM



**“What can I get started for you today?”**



**“We promise our  
plumbers will show  
up on time and smell  
good.”**





**Laramar Apartment Homes - 55,000 units**



amazon.com.

## Dogit Silent Dog Whistle by Dogit

**\$3.74** Add-on Item

Add it to a qualifying order within **17 hours** to get it by **Tuesday, Oct 15**

More Buying Choices

**\$3.74** new (6 offers)

**\$4.99** used (1 offer)



**Intentionally be the  
Consultants of Choice**




# 2015 Nano-Casting



**Roku streams 1,500 content channels**





# **Design & Engineer the Onboarding Experience**

1. A “Welcome to The Team” letter
2. Simplify the “What’s Next?” steps?
3. Easy to Understand Contracts?
4. When will the client hear from you?
5. Annual Outcome Review ??????
6. Can You offer a Personal Gesture?



**ROSE 31**  
90ml 3 FL. OZ.

conditioner/  
apres shampooing

For:  
**Mr. Shafer**

LE LABO - 233 Elizabeth Street, New York, New York

**ROSE 31**  
90ml 3 FL. OZ.

shower gel/  
gel douche

For:  
**Mr. Shafer**

LE LABO - 233 Elizabeth Street, New York, New York

**ROSE 31**  
90ml 3 FL. OZ.

body lotion/  
lotion pour le corps

For:  
**Mr. Shafer**

LE LABO - 233 Elizabeth Street, New York, New York



## Back Pain Meds



# WESTIN<sup>®</sup>

HOTELS & RESORTS





# Maria Garcia



“We know who we are...  
...and who we aren't.”





**When People Love You,  
They Give You More  
Money**

# A Top 5 U.S Bank

**11% Customers Love The Bank**  
(Won't go anywhere else)

**22% Pretty Satisfied**

**38% Would Switch if Closer Bank**

**28% Not Happy w/ Anything**

*\*Gallup case study – Follow This Path*

**They deposited \$8,136  
more per customer**

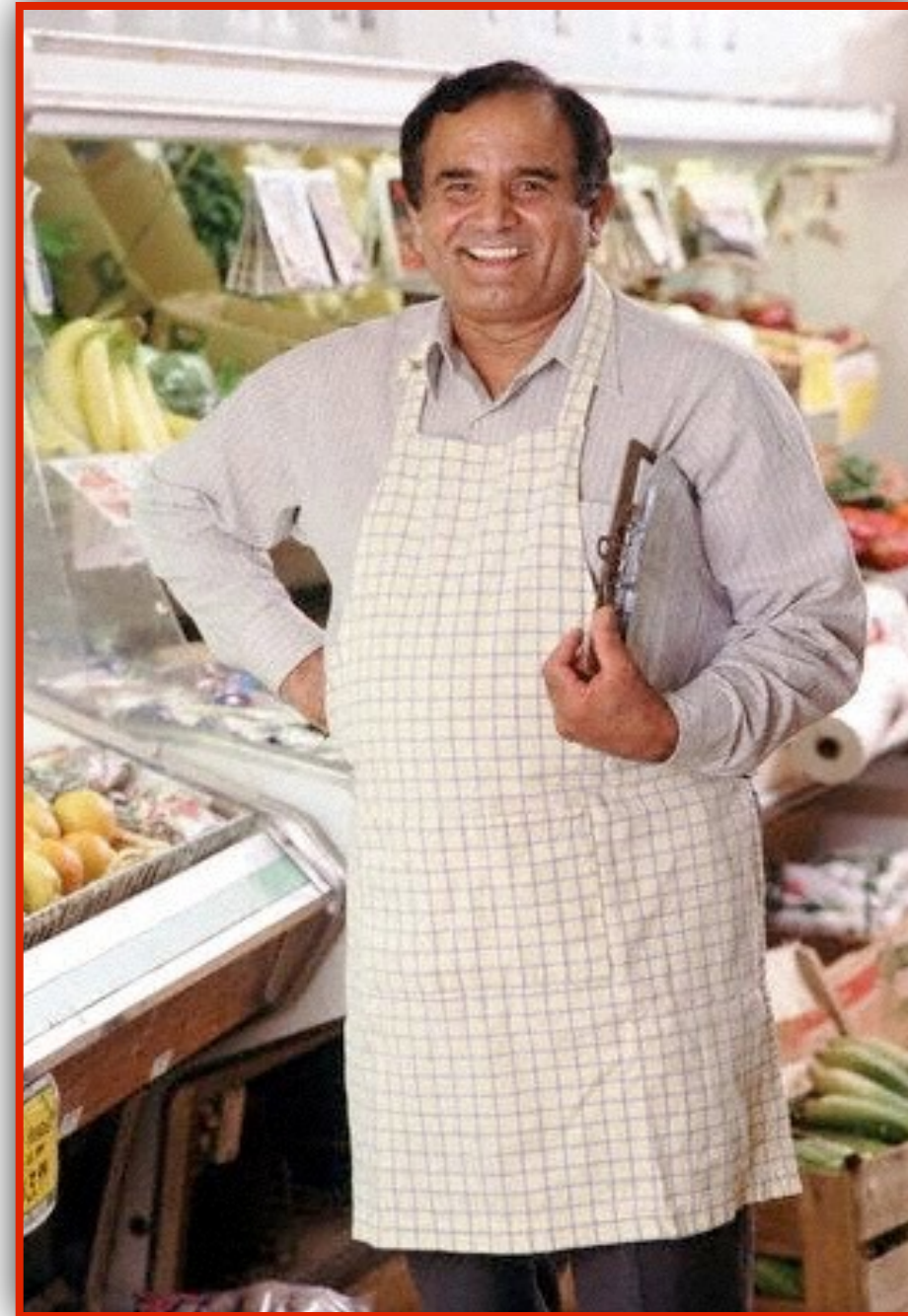
(“What if we could attract 10% more of these people?”)

6% more 'loving the bank'  
translated to...

**\$1 billion in Deposits.**

# John Hixon Hixon's Market

Sweetwater, TX.





**Tell a Better Story About Who You Are...+ What You Can Do**





**Every Conversation  
Should Touch a Heart**

# ELEVATOR PITCH?

**“We take the fear out of investing and manage your financial life.”**



In 1953, Harry and Evelyn Carney bought this Home for \$3,900. Harry put in a rose garden while their two boys Donald and Lawrence built a 2-story tree fort on the side yard. Their daughter, Cynthia was married in the back yard.

Now, after 55 years, Harry and Evelyn have decided to simplify their lives and move to a beautiful assisted-living community just 2 miles away.

Last month, John and Heather Wallace bought The Carney Home at 378 Crestwood. They love the quaint sidewalks, the nearby park, and the short walk to what will eventually become 2-year old Ella's elementary school. We are proud to be a part of helping another generation create new memories in this lovingly cared-for home.



“We know who we are...  
...and who we aren't.”



# Technology is Disrupting “Service”



&





FOCUS<sup>®</sup>  
ON THE FAMILY

**\*Text & Blogs that matter**

**\*30 second update videos**

*\*Patron Journey Map*

## **Hackensack University Medical Center: Visitor Journey Map**

- (1) **The experience begins the moment our visitors approach our front door.** The parking lot and driveway are clean. Everyone in uniform is well groomed and their clothes are fresh and sharp.
- (2) **As visitors walk through the door, our visitors can't help but** notice our spotless and inviting lobby and hallways. Everything is immaculate, floors are polished, furniture is updated, and the overall feeling is that of an upscale hotel.
- (3) **Our “greeter” is the first warm, smiling face they see. He or she asks if they need assistance.** Not only would our greeter answer a question about directions to a family member or patient's room/wing - but also invites them to visit our Café-like cafeteria if they want to wait more comfortably.
- (4) **As they walk the halls or ride the elevator, each time they pass a staff member, they are greeted like family.** No one is ignored here. We want every visitor to feel welcome.
- (5) **We have a Five-Foot Rule. When a visitor is with their loved one,** each attending physician and nurse within five feet says “Hello.” We know this is a vulnerable time for our visitors and we want them to feel that we are paying attention to them in every possible way.
- (6) **Then, after their visit, as they make their way to their car, they think to themselves,** “This is where I would want to be taken care of!”

*Joan Orseck – HR Director – Hackensack Univ. Medical Center*

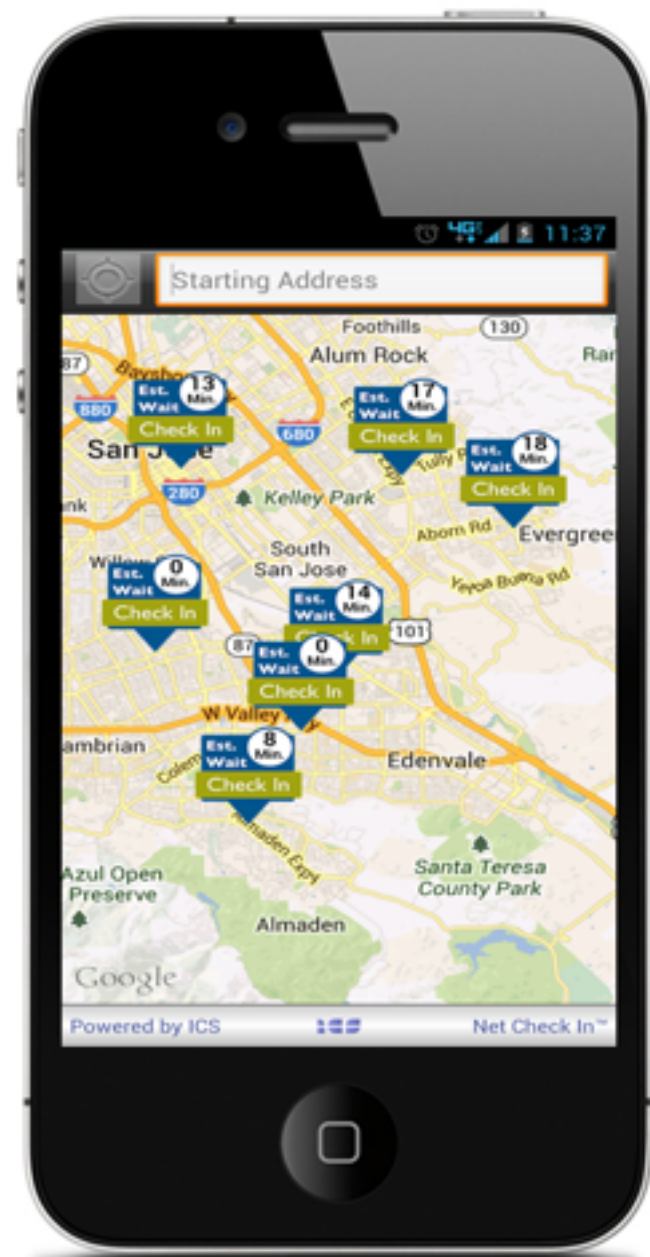


**\*Big Data**

**\*Digital Marketing**

**\*Client Journey Mapping**





# Business Intelligence

A scenic view of a beach with turquoise water and a blue sky with white clouds. The text 'Business Intelligence' is overlaid in the center in a bold, dark blue font with a red outline.

- Facebook
- Twitter/Instagram
- RSS Feeds
- Press Releases
- Google Alerts
- YouTube
- [www.Addictomatic.com](http://www.Addictomatic.com)





UNITED



“If we just ship one more pet a day,  
that’d be \$1,000,000,000B a year.”



**Cozy Cottage Dog House (Colors may Vary)** by Pet Zone (Apr 16, 2007)

~~\$179.99~~ **\$125.00** Prime  
Only 2 left in stock - order soon.

More Buying Choices  
**\$105.00** new (9 offers)  
**\$115.09** used (1 offer)

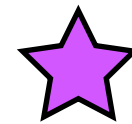
★★★★★ (33)

FREE Shipping on orders over \$25

**Product Features**

Accommodates medium dogs up to 75 lbs

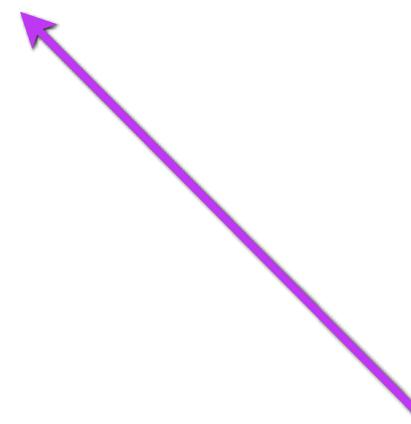
**Pet Supplies:** See all 188,064 items



**WAIT! Need it WAY faster?**



**\$29.59 EXPRESS**





“At L’Oreal we have an exhaustive digital marketing outreach to the main influencers.”





## 3D Silver Glitter Lips: Tips Trick & Tutorial



vintageortacky ✓


 **Subscribe** 382,802

7,409,448

 Add to  Share  More

 18,749  3,841





# The Science of Excellence



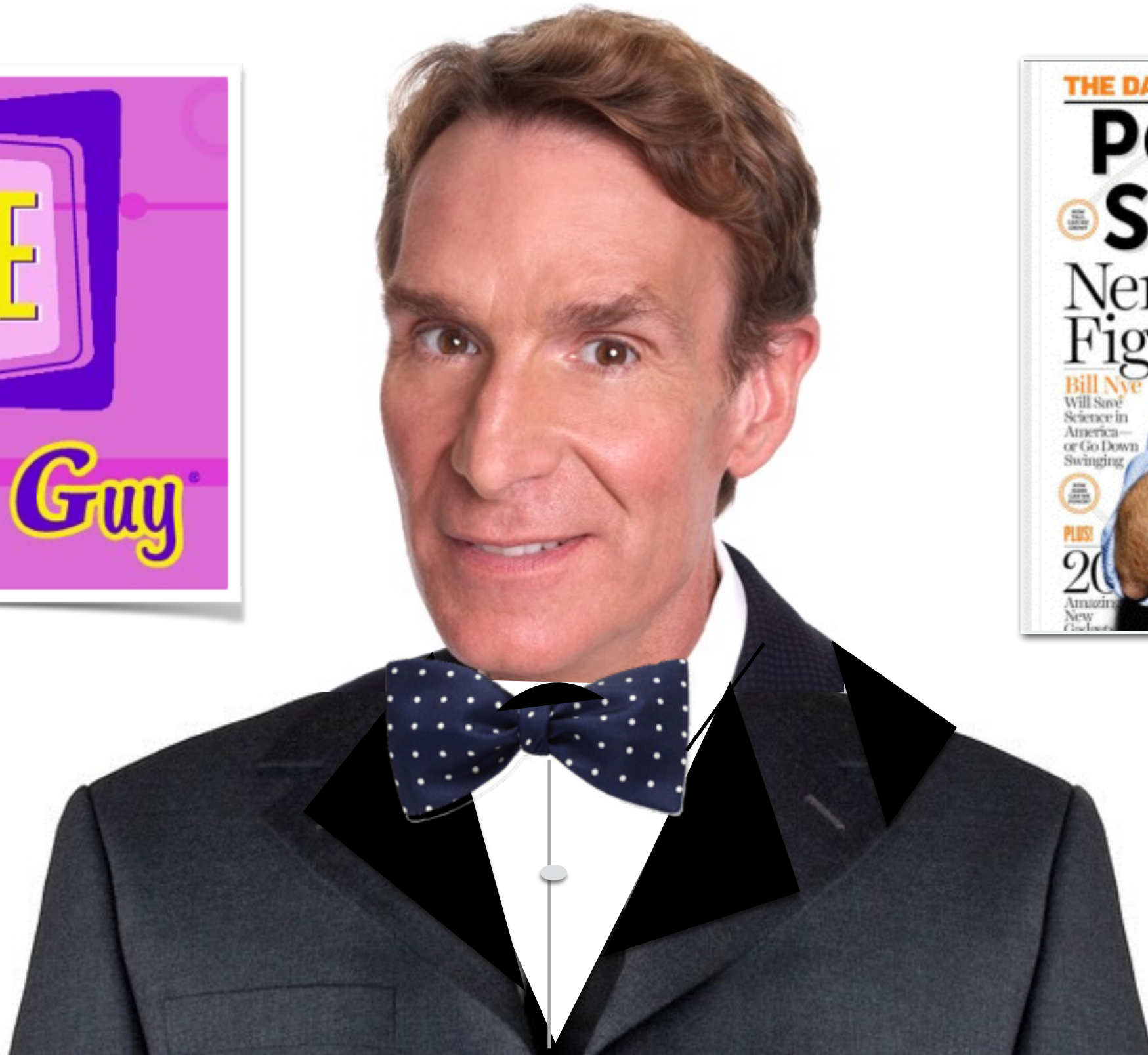
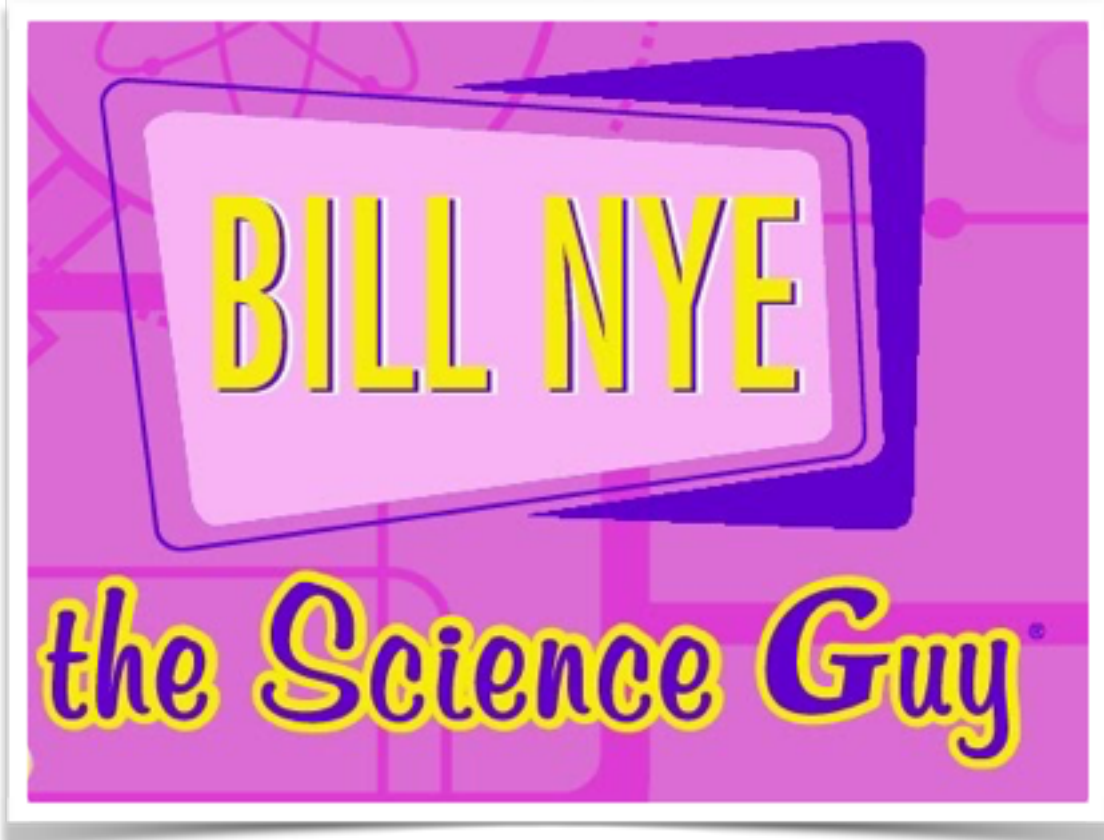
**“Welcome to AT&T.  
My name is Jason.  
How may I  
provide you with  
outstanding  
customer care?”**

- 1. AWARE OF YOU**
- 2. THEY TAKE ACTION**
- 3. EXPERIENCE YOU**
- 4. ADVOCATE FOR YOU**

# 1,127 Free Throws in a Row











**Be an Other-Centered  
Organization**

**1. How often do you talk to your clients?**

**2. What do you talk to them about?**



Learn vital talk show skills.

**“People want to  
feel valued and  
appreciated.  
They want to  
feel interesting”**



**Katie Couric**



Search for people, places and things



**Ross Shafer**  
Edit Profile

FAVORITES

News Feed

Messages 99+

Photos

Browse

PAGES

Pages Feed 20+

Like Pages 20+

Create Ad

GROUPS

University of Puget Soun...

Update Status Add Photos/Video

What's on your mind?

SORT ▾



**Nancy Vogl**

Is anyone else having problems posting on FB today?

Like · Comment · Share · 10 hours ago near Traverse City, MI ·

Monika Laschkolnig and 7 others like this.

View 21 more comments

**Aileen Bennett** Thank you – I thought i had broken the internet (again)

6 hours ago · Like · 1



**Kathleen Hassan** yup

5 hours ago · Like · 1

# Chief Trending Officer



# TREND SPOTTING SITES

<http://www.springwise.com> (My favorite weekly updates)

<http://www.forbes.com/sites/stevecooper/2013/11/19/how-to-become-a-trendspotter/>

[www.Trendhunter.com](http://www.Trendhunter.com) (Cool inventions)

<http://dupress.com/periodical/trends/business-trends-2014/> (Deloitte University)

<http://www.gartner.com/newsroom/id/2603623> (Technology trends)

<http://www.infoq.com/research/software-trends-2014> (Software trends)

<http://www.businesswire.com/news/home/20140101005013/en/Forrester-Top-Global-eCommerce-Predictions-2014#.U-GCYIYQ7wI> (Business Wire & Forrester Research)



**Your Final Moment  
Drives Loyalty**





Tonight's KICKER Story

**47% repeat  
patient visits**

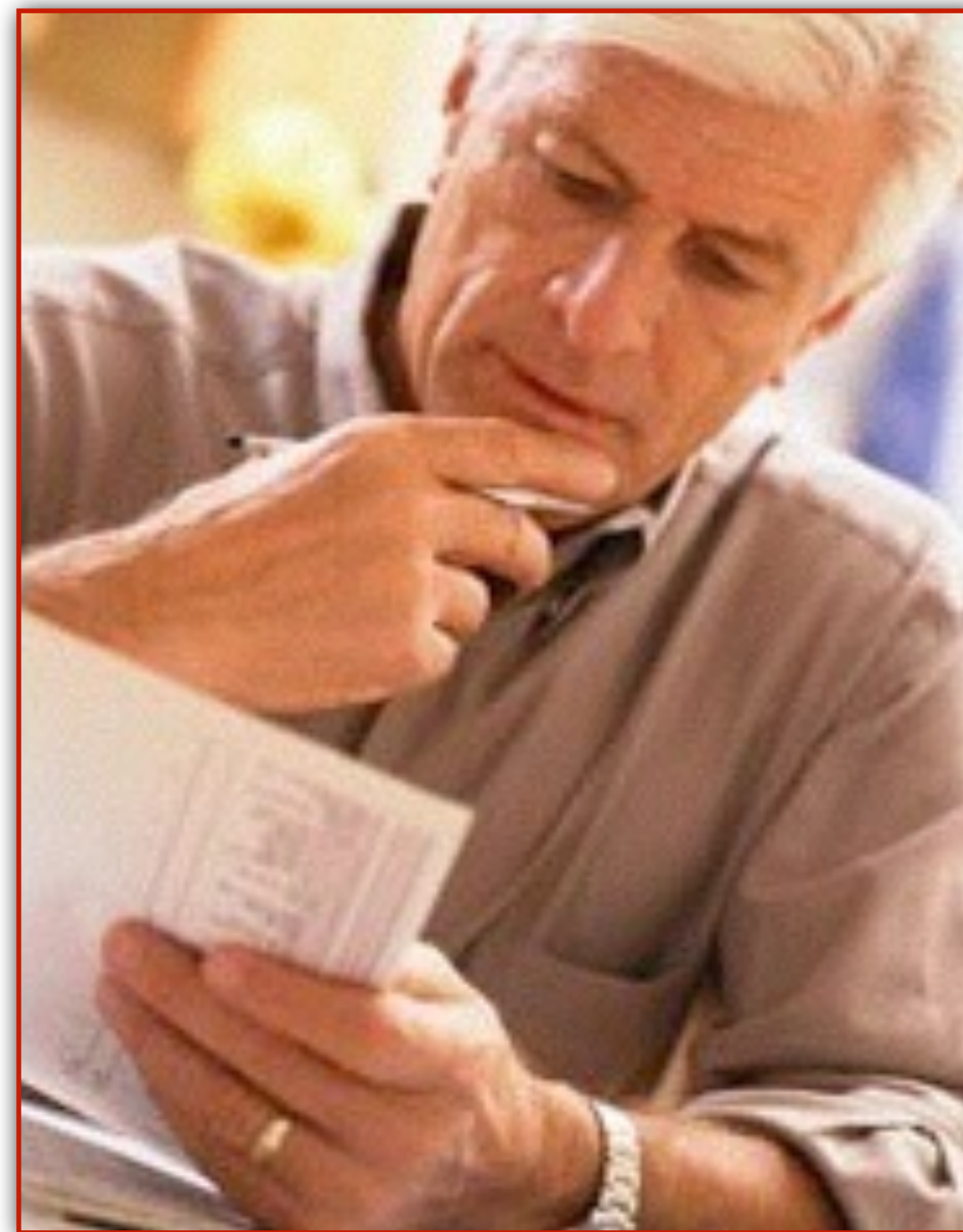
**Gentle**   
**Dental**



# NORDSTROM



Which is why we  
must be careful re:  
**Client Evaluation  
Forms**



**Don't make people  
think too hard  
about YOU.**



# THE CALLAHAN TRUCKING COMPANY NON-SURVEY



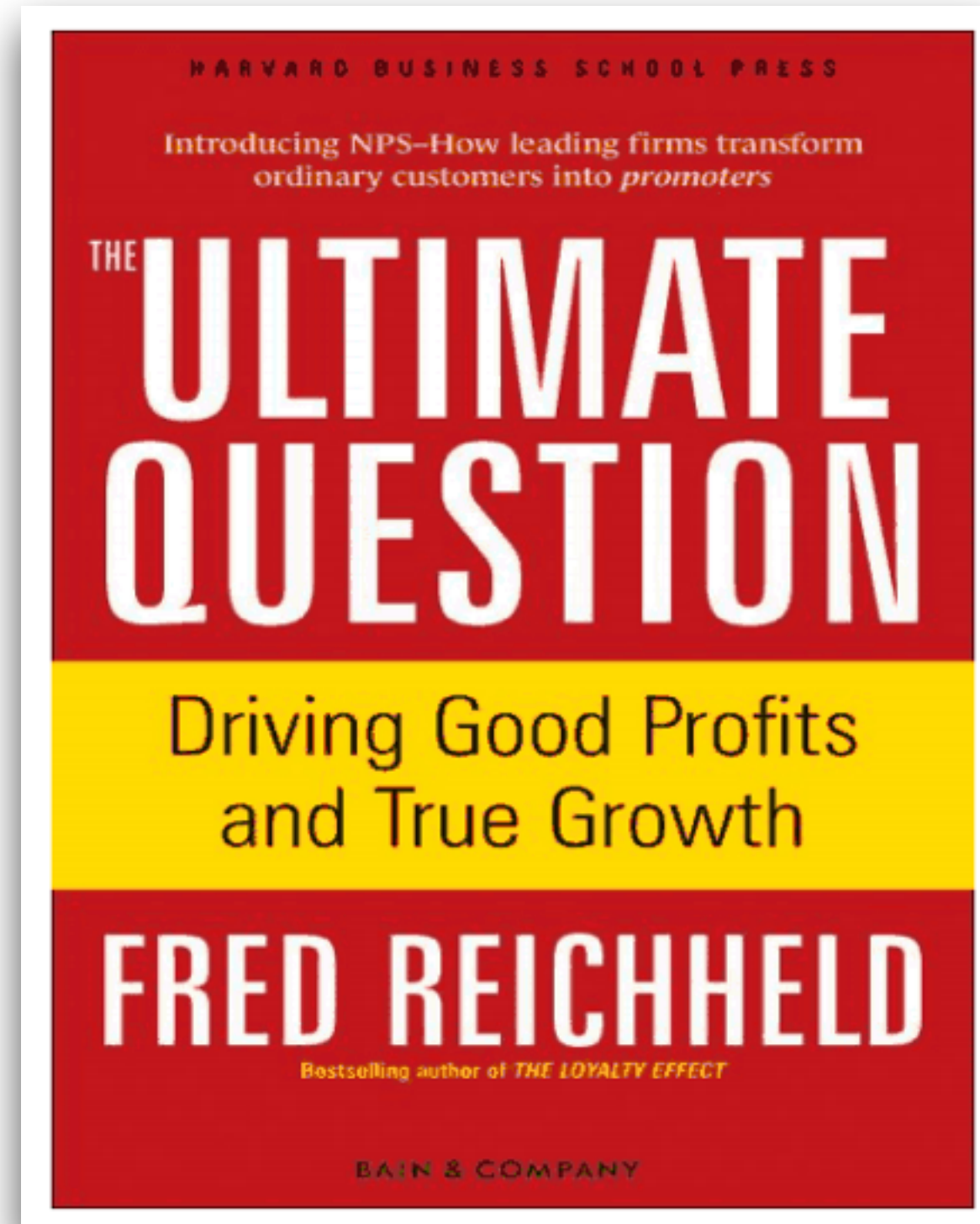
Please check  the face that best describes how we treated you.

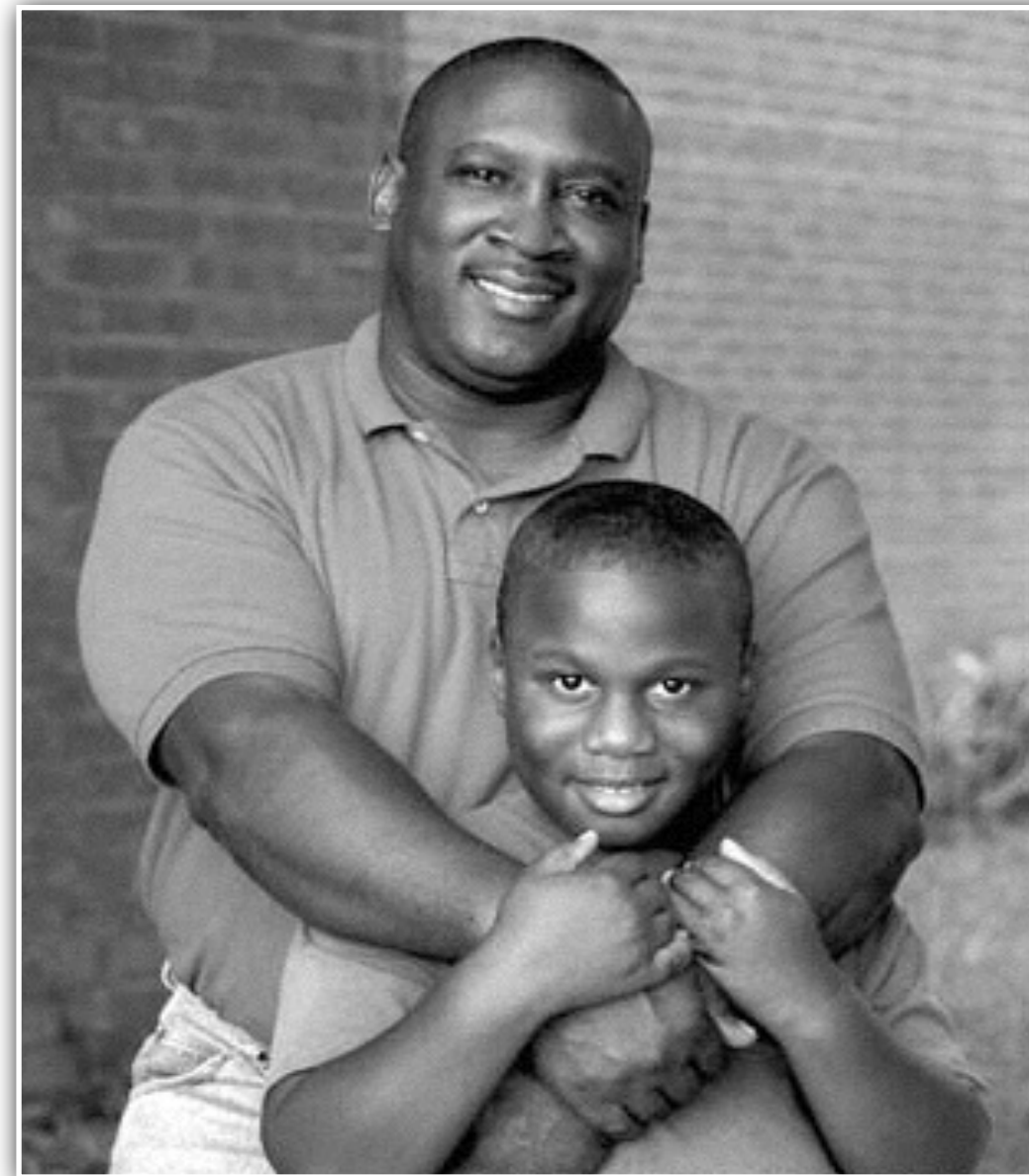


How did you feel after doing business with us?



**NET  
PROMOTER  
SCORES  
ROCK!**





# Your Legacy





Chuck Shafer 1927-2001



**Ryan Shafer**



**Adam Shafer**



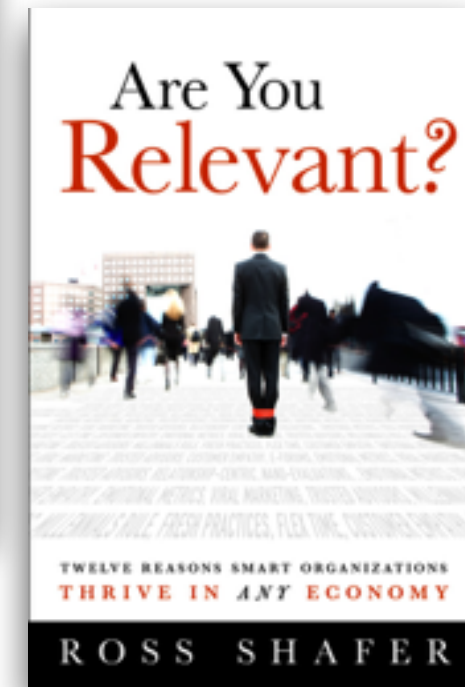
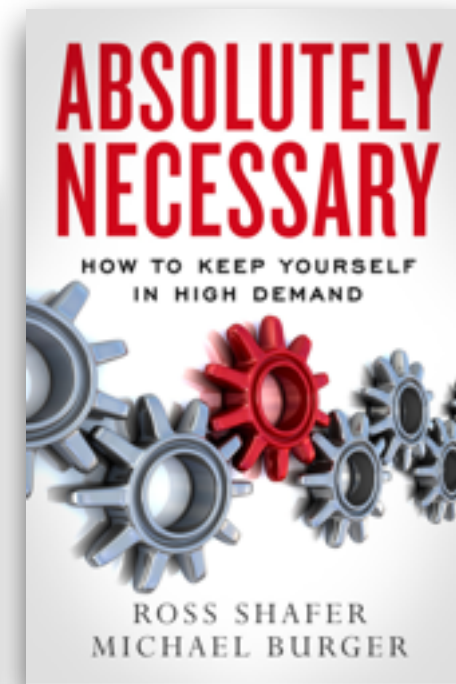
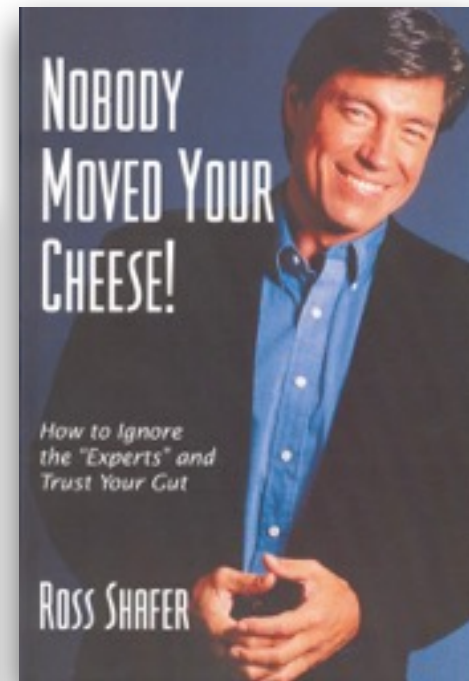
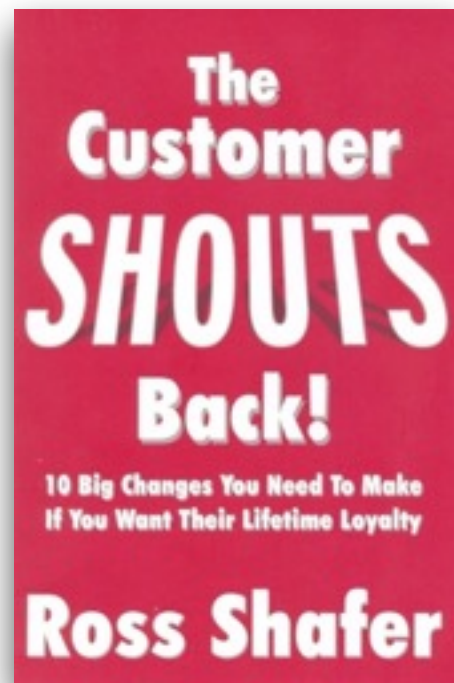
Leah, Ross, Lauren (Lolo), Ryan & Adam Shafer





**Work is Hard. We Must  
Champion Each Other.**

# Want a Customized Message Delivered to Your Office?



Let's talk afterward ;-)