



THE POWER OF PARTNERSHIP: LEVERAGING PARTNERS TO ACCELERATE MARKETING TRANSFORMATION IN APAC

By Anthony Oundjian and Shiv Choudhury

A Time of Accelerated Change

MARKETING HAS EXPERIENCED A SIGNIFICANT TRANSITION over the last five years in response to evolving consumer behavior and expectations. In order to adapt, marketers have had to learn to harness the power of digital to overhaul large aspects of their go-to-market, from how they sell, service, price and assist, to maintaining or building high relevance with their audiences.

Consumers now expect a high degree of personalization when engaged by brands, but the rich data required to enable such personalization is too often still fragmented. The challenge for marketers is to integrate data sets, factor in regulation, address any potential consumer privacy concerns, and deliver meaningful personalized engagement — all at the same time. Access to advanced digital capability is key to overcoming this challenge.

According to our [2019 study on Digital Marketing Maturity](#), Asia Pacific (APAC) organizations who consistently display advanced digital capabilities outperform their peers both in incremental revenue and annual cost efficiency. Yet, only 2% of surveyed organizations in APAC apply advanced digital capabilities across all key dimensions of the BCG-Google Digital Marketing Maturity framework.

The same study shows that 56% of APAC organizations rate themselves below average or average in unlocking the value of their first-party data. Changing privacy regulation and browser policies, such as India's Personal Data Protection Bill, Viet-

nam's Law on Cybersecurity, and Thailand's Personal Data Protection Act will only increase the importance for marketers to be able to unlock the value of their first-party data.

COVID-19 has further intensified the pressure to accelerate marketing transformation plans. Through 2020, it has become mission-critical to use technology to stay operational and connected to consumers, and this has often brought efficiency benefits. Many marketers have accelerated initiatives to automate processes, develop digital-first assets, strengthen or build e-commerce capabilities, adopt virtual events, and switch to digital collaboration platforms over this period.

Underpinning all of this is an expanding and evolving ecosystem of partners who support, steer, and drive forward successful marketing transformation. The majority of APAC marketers involve multiple partners for their marketing activities, with only 10% of marketers retaining all activities in-house.

In order to better understand the landscape of partners working with marketers in APAC, Boston Consulting Group (BCG) collaborated with Google and a selection of key partners to gather insights on the critical role partners play with marketers to accelerate marketing transformation. (Refer to "[About the Study](#)," for more on our collaboration and methodology.)

The Evolving Partner Landscape

There is an expanding and evolving partner ecosystem that is ready to support marketers in APAC. Partners are strengthening their digital capability by building or acquiring data, analytics and technology expertise, a key enabler of successful marketing transformations. This is reshaping the partner competitive landscape.

Global media agencies are building or acquiring data and technology expertise as a complementary revenue stream to their core business of media management. Independent marketing specialists with data and technology services as their primary offering have only entered the APAC partner ecosystem over the last five years. Whilst they also continue to build or acquire capabilities, their goal is to provide a fuller suite of digital services to marketers in the area of creative, data and analytics. Large consultancies are incorporating marketing capabilities into existing digital products and services as an integrated offering. They leverage their broader network of services such as auditing, strategy consulting, and implementation support to engage with marketers on transformation.

The evolution in marketers' demand have been met with new service models by partners, unlocking new ways to collaborate. For example, there is greater receptivity to the use of hourly based models or in some cases fees linked to business outcomes. Technology platforms are able to qualify the capabilities of partners through certified partner programs that highlight the proficiency of partners. These programs provide valuable assistance for marketers to find the right partner(s) for their needs.

EXHIBIT 1 | Partners wear ‘multiple hats’ in supporting marketers in APAC



Tech and Data Specialists

1. To educate and guide marketers through their marketing transformation journey whilst working within their organizations' limitations
2. To bridge the gap on specific scarce skills and provide guidance on increasing ownership of data and technology



Value & Insights Drivers

1. To ensure marketers are laser focused on outcomes, tying marketing activities to business outcomes
2. To help marketers capture the value of digital marketing, regardless of their starting position –e.g., existing technology



Strategic Orchestrators

1. To support marketers in connecting and collaborating across multiple departments to drive broader organization-wide strategic initiative
2. To guide data and tech infrastructure decision making

Source: BCG-Google study on partnerships (October 2020)

The Value Partners Bring to Marketers

Partners offer a broad spectrum of support to marketers. Through our in-depth interviews with APAC partners, we have identified three key roles that partners fulfill to unlock the full potential of marketing transformation. (Exhibit 1.)

Technology & data specialists. Technology and data specialists leverage their technical know-how and extensive industry experience to support marketers to develop solutions within the constraints of each organization. Organizations are supported through education and sequencing of practical action plans, to address their specific needs regardless of their starting position. This importantly includes guiding marketers in privacy safe practices specifically in the application of first-party data. *“We make sure we put forward a realistic version of our clients’ aspirations and goals,”* said a senior executive of a global networked marketing partner in APAC.

Marketers are also faced with challenges in finding, attracting, and retaining relevant talent. Technology and data specialists work closely with marketers to help source and provide in-demand talent such as data scientists and channel specialists. Although these technical skills tend to be secondary to an organization’s primary focus area(s), they are critical to effective marketing transformation. Partners also help marketers to identify in-housing opportunities with specificity, a trend we increasingly observe today. *“We advise clients on which capabilities are better to in-house vs. outsource, based on their needs, but also their existing set up,”* said Prantik Mazumbar, Partner, and Srotoswini Roy, Director, Happy Marketer—part of Dentsu Aegis Network, APAC.

“We are able to guide organizations, leveraging our learnings and best practices gained through cross-country, cross industry experience,” said Mat Norton, Director of Deloitte Digital, APAC.

Value & insight drivers. Organizations often fail to comprehend the true value of marketing initiatives, leading to a disconnect between demands and expected outcomes. Value and insight drivers enable marketers to realize the value of their marketing activities. *“Our role is to help marketers map marketing investments back to business outcomes, assigning success to digital marketing maturity dimensions to deliver cost efficiency and sales uptake,”* said Chris Rozic, CEO of Datisan, ANZ.

Marketers are also pressured to deliver real-time insights and easy-to-understand visualization across their organizations, in order to inform C-Suite decision-making. Value and insight drivers support marketers by building relevant automated dashboards, based on metrics that are directly linked to business outcomes. *“Personalization, getting towards who said what, when, where is important in guiding decision making, but it really depends on what is needed and possible with clients...we help bring a practical lens in designing the right cadence, with the right measurement linked to business outcomes for them”* said a senior executive at a global networked marketing partner in APAC.

These challenges are compounded by typical approaches to purchasing technology, which are often undertaken without full alignment to business problems and sufficient understanding of all potential digital solutions. *“We work to help organizations extract the maximum value from technology platforms. While we might not know everything about a client’s business, we do know a lot about other businesses and best practices,”* said a head of division at a global networked marketing partner in APAC.

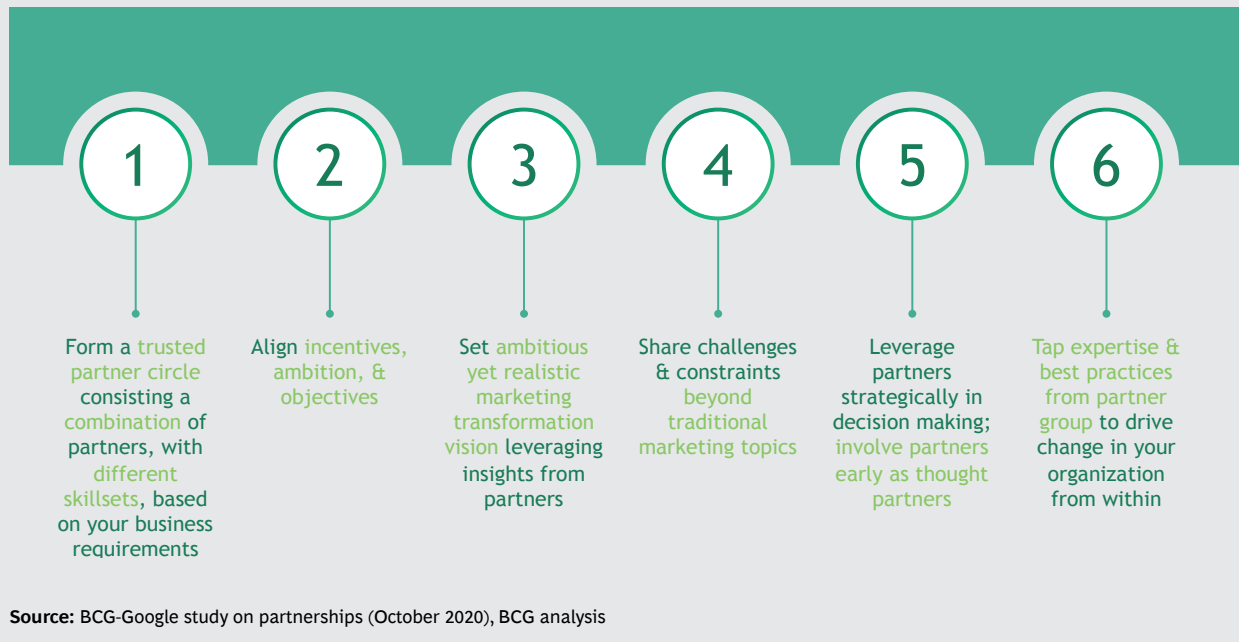
Strategic orchestrators. Marketers are faced with siloed systems and traditional organizational structures that do not fully appreciate the evolving role of the chief marketing officer (CMO). Strategic orchestrators have the experience to educate and bring different departments together, integrating marketing functions across IT, digital, and data, to drive specific strategic initiatives. Partners deliver value through their experience in championing marketing transformation to executive decision makers, creating a positive impetus for change. *“Ensuring the organization is aligned is a key challenge facing organizations as they embark on evolving their digital maturity. We help unify IT and marketing stakeholders to elevate a compelling strategy to the C-Suite that drives meaningful outcomes,”* said a senior executive at an independent marketing specialist in APAC.

Six Practical Tips for Marketers

Partnership provides a pathway for marketers to realize the goals of a marketing transformation. Marketers looking to engage partners should consider six practical tips that maximize the value for all involved. (Exhibit 2.)

- 1. Leverage the power of multiple partners to accelerate your transformation.** Be strategic in setting up a partner group, incorporate a combination of different capabilities to deliver on business objectives. Use technology platform certifications to help curate the right mix of partners based on their competencies.

EXHIBIT 2 | Six practical tips for marketers to configure for success leveraging strategic partnerships



- 2. Explore new models such as result-based fees to align incentives.** Be creative in finding ways to align incentives with partners with shared goals and measurable performance indicators. Explore viable support models and maximize the flexibility of partners. Involve partners as early as possible and articulate the organization's vision and business objectives to define immediate priorities. This could include identifying and aligning on three or four key priority areas, including quick-win initiatives to demonstrate success.
- 3. Set both the vision and key intermediary milestones to get there.** Set an ambitious but realistic vision, aligned with changing consumer expectations, and yet flexible for a rapidly evolving landscape. Short-term priorities can be planned over a 3-6-month timeline as milestones, with long-term priorities incorporated as 1-2-year change initiatives as part of a vision. Partners can offer insights into sequencing of these priorities based on ease of implementation and the value at stake.
- 4. Be candid about your challenges.** Share what your limitations and constraints are, particularly around technology and processes, organizational capabilities, and willingness to change. Consider other strategic initiatives and how they integrate with the organization's overall marketing journey in areas such as product development and end-to-end customer experience. By doing so, partners can provide a more comprehensive assessment of the organization's baseline and offer practical steps to accelerate the marketing transformation journey.

5. **Be open to be constructively challenged by a trusted partner.** Be receptive of partner insights and learnings from other work. These can include best practices that the marketer's organization may not have been exposed to before. Empower partners to challenge constructively, ask probing questions, and bring fresh perspectives to timely broaden the knowledge of organizations.
6. **Treat partners as core members of your internal project team.** Involve key partners in your thinking. Embrace them as an extension of your team and leverage them as change agents who can both steer and catalyze marketing transformation.

These six steps provide a practical pathway to leverage the value of partners in supporting and steering marketing transformation. The success of these measures will be built on open and honest communication, and a willingness of organizations and marketers to adapt and evolve within a changing operational landscape. In doing so, marketers are presented with the opportunity to effectively transform their marketing function, maximize the delivery of their business objectives, and unlock valuable new opportunities as a digitally empowered organization.

About the Study

Boston Consulting Group collaborated with Google to gather in-depth insights for this study, looking at the value partners bring to marketers in APAC and how marketers and partners can best collaborate to accelerate their marketing transformation journey.

This study employed a qualitative approach, engaging with senior executives of key Google partners in the region through interviews to build an understanding of the landscape. These partners reflect key decision makers and industry experts in the realm of marketing, with extensive experience operating across industries and geographies in APAC.

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