

Leading Growth and Transformation

How To Turn Challenge Into Opportunity & Disruption Into Competitive Advantage

2020 IDFA Dairy Forum | January 27, 2020



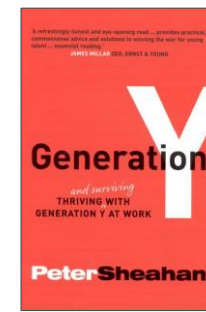
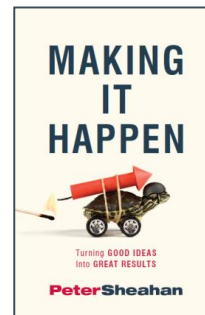
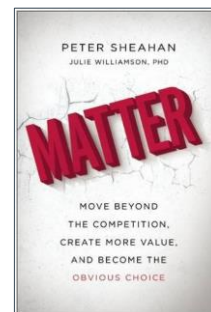
petergsheahan



petersheahan



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“We never saw it coming”

VP Marketing



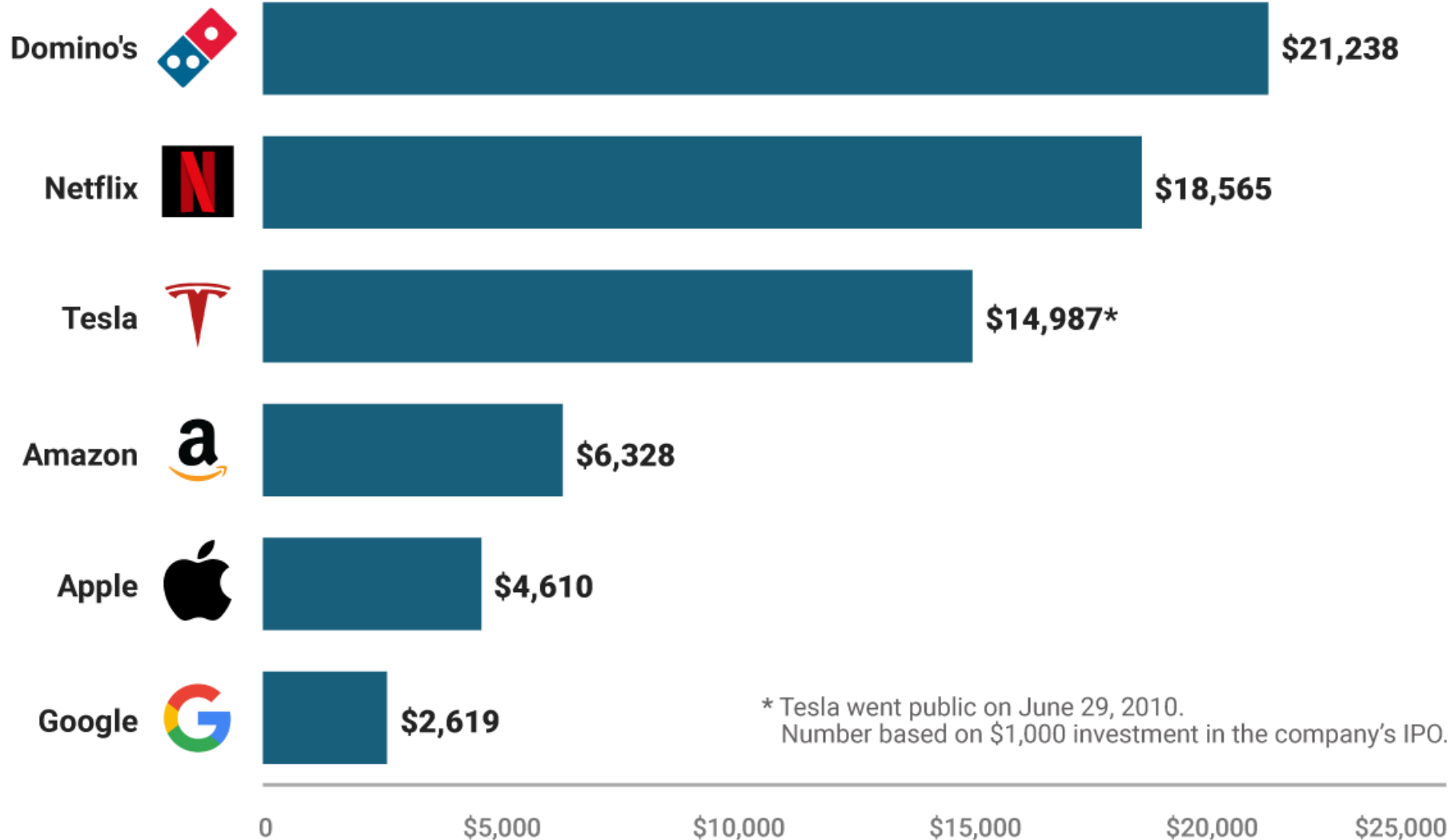
SOME SUBTLE HINTS...

1. 2016: Amazon released their own Wickedly Prime food brand
2. 2016: Amazon announces the Amazon Go grocery store
3. 2015: “Grocery Industry Tries Not to Freak Out as Amazon Plans Its Own Food Line”
4. 2007: Launched Amazon Fresh and have been expanding consistently outside Seattle since 2013
5. 2006: Amazon starts selling food
6. 1999: Amazon buys 35% of homegrocer.com



PRESENT VALUE OF \$1,000 INVESTED IN JANUARY 2010

Present value as of March 23, 2017; adjusted for splits and dividends.





“The crust tastes like cardboard.”

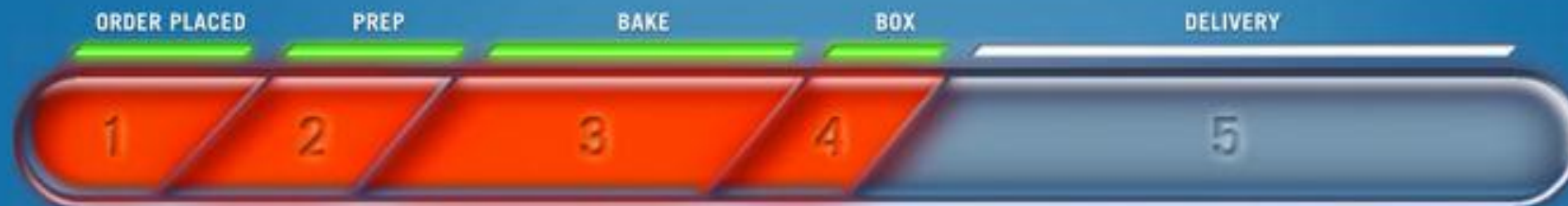
“We needed to become a brutally honest company.”

Patrick Doyle
CEO, Domino's Pizza

Peter Sheahan

PIZZA TRACKER

You got 30 minutes and you got Domino's Pizza headed your way. Our delivery experts have specifically engineered the Pizza Tracker to keep you up to date on the status of your order from the moment it's prepared to the second it leaves our store. You got tracking where tracking has never gone before.



YOU GOT ORDER ASSEMBLY - YOUR ORDER WAS BOXED FOR DELIVERY AT 12:37 PM

PATENT PENDING

YOUR LOCAL STORE:

Contact your Domino's with any questions:

2282 South Main Street
Ann Arbor, MI 48103
734-332-1111

YOUR ORDER DETAILS:

- (1) Small (10") Hand Tossed Pizza
Extra Cheese, Sauce, Pepperoni, Italian Sausage.
- (1) Chicken Kickers
- (1) 2-Liter Coke

RATE YOUR DOMINO'S

When your pizza arrives tell us how it was.
(RATE OUR SERVICE FROM 1-5)



STORE AVERAGE: ★★★★★ LEAVE US A MESSAGE

COMPANIES DON'T TRANSFORM, LEADERS DO...

Turning challenge into opportunity is a
psychological journey first, strategic second!



THE TRANSFORMATION JOURNEY...

- 1. TELL YOURSELF THE TRUTH:** Move from *awareness of change to ownership for leading change!*
- 2. FOCUS ON VALUE:** Create constructive tension by choosing a *burning ambition over a burning platform!*
- 3. ALIGN, ALIGN, ALIGN:** Re-orient from working hard in *agreement to doing the hard work of alignment!*

I. TELL YOURSELF THE TRUTH

Move from *Awareness of Change*
to
Ownership for Leading Change!

AWARENESS

OWNERSHIP

Mindset



Prevention

Promotion

State



Frustration

Curiosity

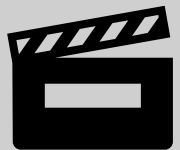
Narrative



To us

For us

Action



Acting on experience

Acting on possibility

MARKET	INDUSTRY	CONSUMER
Challenging Geopolitical Environment	Commoditization (Margin Pressure)	Eating their Dairy
Declining NA Fluid Dairy Milk Consumption	Consolidation	Health Conscious
Supply + Demand Mismatch (Export Opportunity)	New Business Models (Differentiation)	HOW it is made, not just WHAT it is (Health & Sustainability)
Rising Demand for “Milk” Alternatives	Consumer Demand Driven	Amazonification of Expectations



Going it Alone

Playing a Zero-Sum Game

Fighting the Competition

Legacy Business Models

Fluid Milk

Sustainability is Producer Responsibility

Production, production, production

Collaboration

Moving into a Win-Win Mindset

Delivering FOR the Consumer

New Business Models

Differentiation + Value Add

Whole Value Chain Takes Ownership

Innovation, innovation, innovation



Where are you failing to
accept AND take
ownership for the
external disruptions or
internal challenges that
you are already aware of?

The background is a complex, multi-layered abstract composition. It features a central figure with a crown, rendered in dark, sketchy lines. The figure is surrounded by a dense array of colors and textures, including bright yellows, greens, blues, and reds. The overall effect is one of dynamic energy and visual complexity.

OBSERVATION

It's harder for a leader to move from awareness to ownership than it is
to move from ownership into action!
(for both external disruption as well as internal challenges)

CIRCULAR CONVERSATIONS



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“I agree we must change, but that is so-and-so’s job”



ASSUMPTIONS

“It’s a fine line between experience and baggage”

A photograph of three business professionals in formal attire (suits and a dress) bowing deeply on a sandy beach. Their heads are touching the sand, and their hands are on the ground. The background shows a vast, flat landscape under a clear sky.

If the rate of change outside of your business is faster than the rate of change inside... you are becoming less relevant!



II. FOCUS ON VALUE

Create constructive tension by choosing a
burning ambition over a burning platform!

BURNING AMBITION

“Escape the gravity of your own success”

The role of leadership is to migrate the organization from one competitive advantage to the next!

External disruption & market pressure

Internal cultural norms & limitations of scale

Proactive Leadership

SELF-DISRUPTION

NEW GROWTH CURVE

FLATTEN EXISTING CURVE

Additional cash for investment in the future

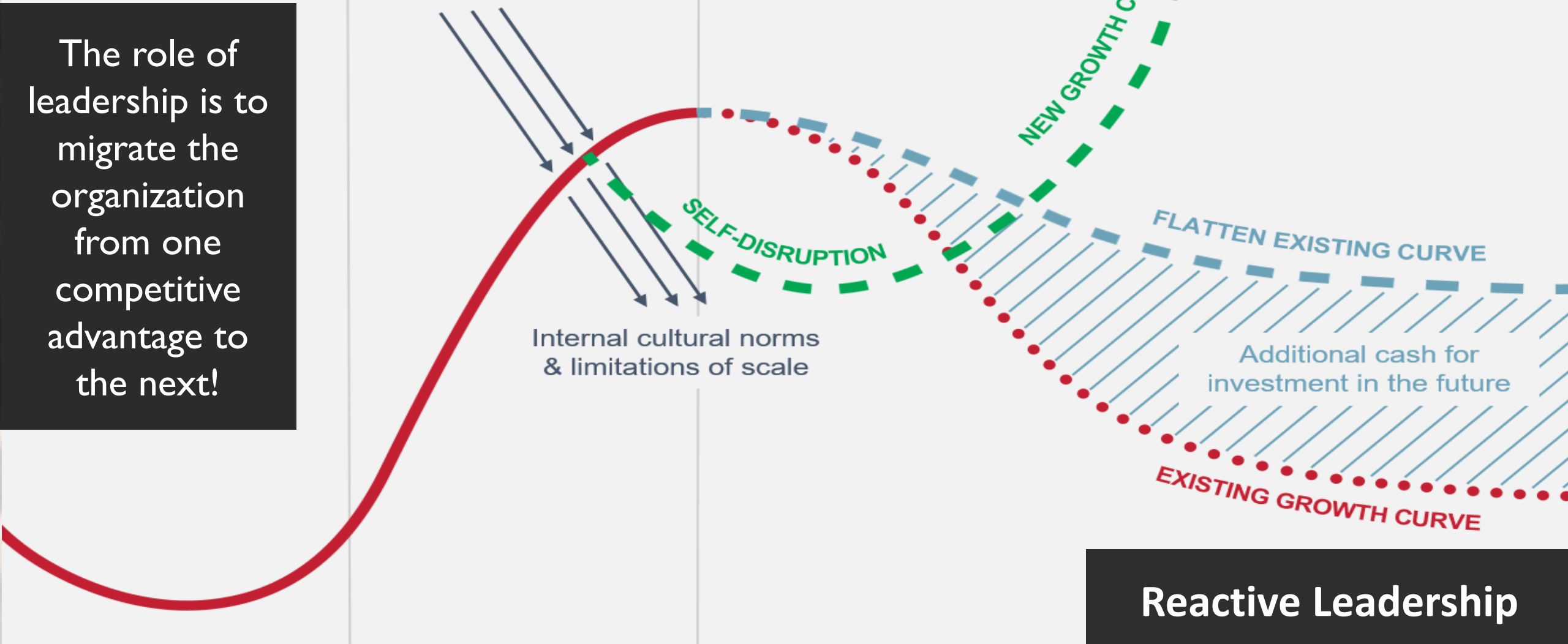
EXISTING GROWTH CURVE


Reactive Leadership

Starting Up

Growing Fast

Transform or Decline



A photograph of Jeff Bezos, CEO of Amazon, speaking at a podium. He is wearing a blue suit jacket over a light blue shirt. He is gesturing with his right hand while holding a small device in his left. The podium in front of him has the Amazon logo on it. The background is dark.

Are you leading your
customers to the future or
are you following them
there?

WHAT WE SELL → WHAT WE SOLVE



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Nike+ 'Platform'

1. Over 170 million members
2. Members spend 3x more
3. 100's millions goals set
4. 10+ Billion Miles Run
5. Data and Analytics
6. Community

DISTANCE

6.30 MI

40 6.30 6.20 6.00 5.90 5.80 5.70 5.60 5.50 5.40

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WOULD YOU DO SOMETHING IF...

1. It made you less happy
2. 80+% chance of creating “economic burden” for life
3. Long term denial of certain human needs
4. Had a 50% chance of failing anyway
5. Would lose half your assets when it did




A DIAMOND IS FOREVER



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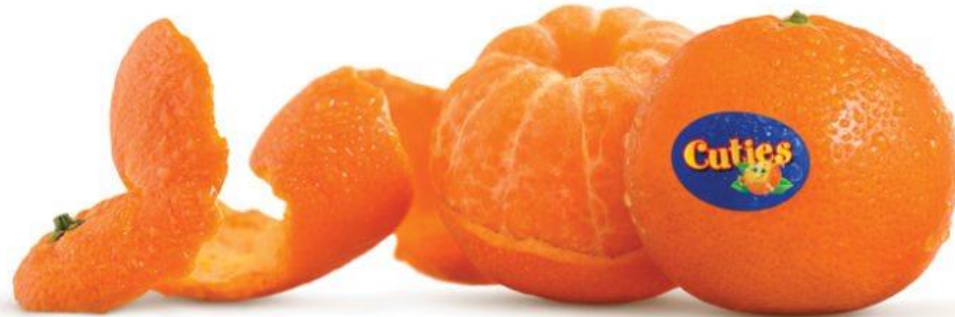


Take *ownership* for what's happening,
connect the dots, and take intelligent risks
at the edge of disruption

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BRANDING A COMMODITY





What OPPORTUNITIES are there for you to have a more differentiated and valuable impact on the lives of your customers and consumers?

The background is a vibrant, abstract composition of colors and textures. It features a mix of bright colors like blue, green, yellow, red, and pink, interspersed with darker, more muted tones. The overall effect is one of dynamic energy and creative chaos, with various brushstrokes, splatters, and layered colors creating a rich, multi-dimensional visual field.

PROVOCATION

Do not complain about commoditization if you intend to solve the same problems in the same ways as the competition!

The background is a complex abstract composition of various colors and textures. It features splatters of red, yellow, and blue paint, along with streaks of green and purple. A central vertical element consists of dark, overlapping lines that resemble a dense network or a stylized structure. The overall effect is one of dynamic energy and visual complexity.

ENTITLEMENT

Everyone loves a free market until they've got competition.

3. ALIGN, ALIGN, ALIGN

Re-orient from working hard in *agreement* to doing the hard work of *alignment!*

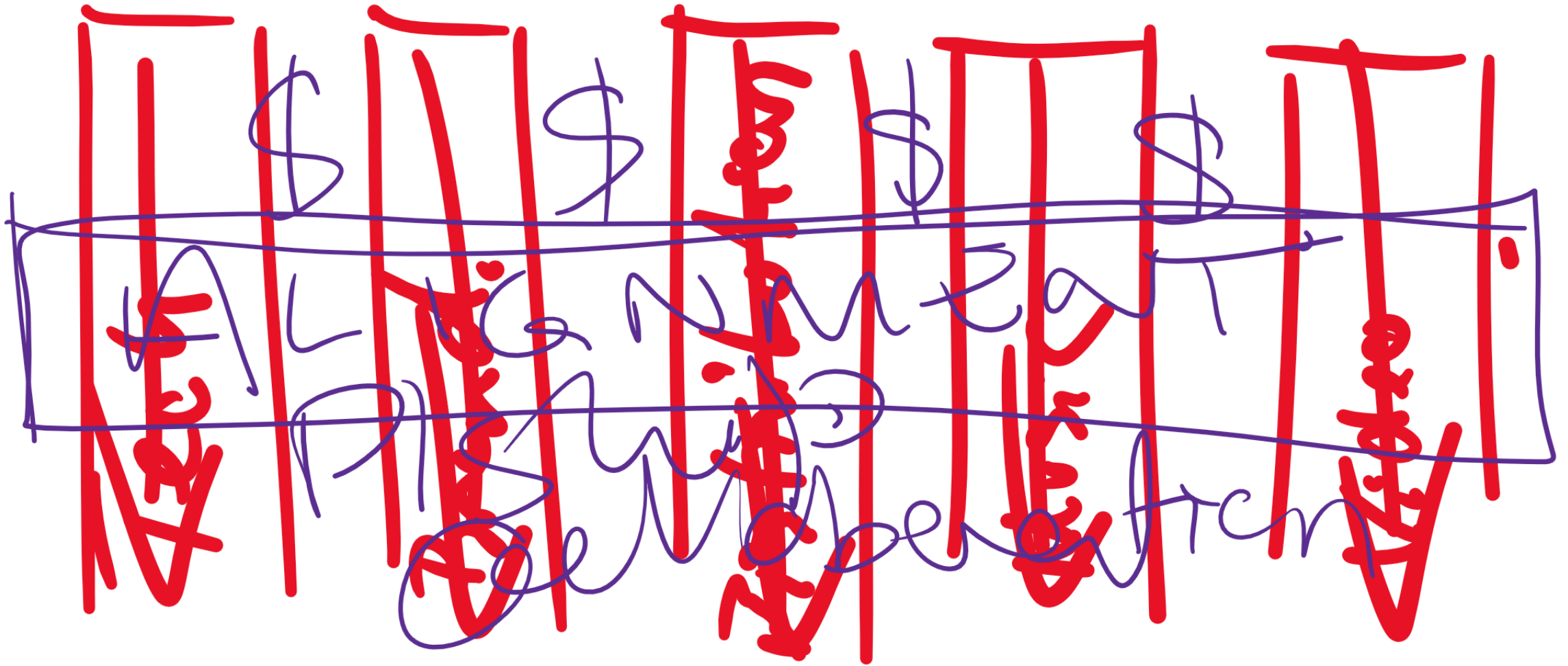
COLLABORATION

The opportunity is in the whitespace



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www.karrikinsgroup.com



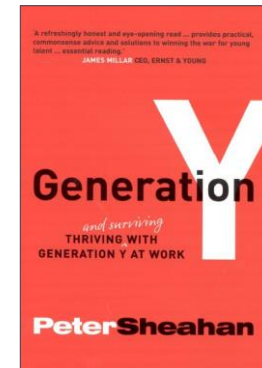
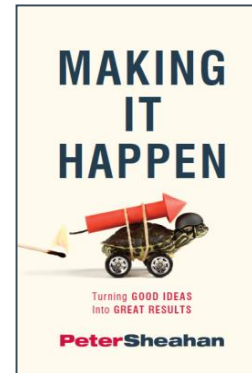
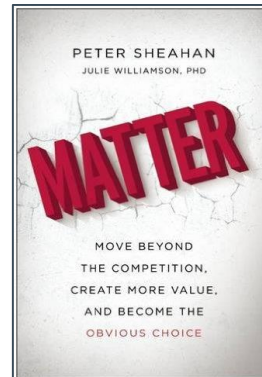
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Text 'MATTER' to
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