



cutting through complexity

A single view:

putting customers
at the heart of
your D&A strategy

kpmg.com/data



Foreword

These days, it seems everyone wants to talk about data and analytics (D&A). And rightfully so: those organizations that are able to leverage their data to create real and actionable insights are already gaining clear competitive advantages in their markets, reducing their risks and managing their costs.

Yet KPMG member firms' experience suggests that the leaders of tomorrow will be those that put the customer at the heart of their D&A strategies today. Indeed, the ability to achieve a 'single view' of the customer is already proving to be a 'killer' competitive advantage in many sectors and markets.

For organizations operating in Asia-Pacific, the challenge may be more acute. Those with operations in multiple jurisdictions are already struggling to develop a single strategy that works for all markets, let alone centralizing their data from across their various operating companies and systems. Many organizations still see D&A as an IT-driven strategy; few yet fully understand the value of D&A beyond simple management information and reporting.

That is why KPMG commissioned Forrester Research to conduct an in-depth review of the state of D&A maturity across the Asia-Pacific region. This report brings together the results of our own quantitative survey of more than 210 business decision-makers across the region, dozens of in-person qualitative interviews and deep bench research to deliver a snapshot of D&A maturity in Australia, China and the key ASEAN (Association of Southeast Asian Nations) markets of Indonesia, the Philippines and Singapore.

What we found was that – while pockets of D&A greatness certainly exist within the region – more effort will need to be

put towards creating this 'single view' of the customer. Data siloes will need to be deconstructed, skills will need to be transferred and formal strategies will need to be developed and communicated.

Those that are able to manage this transformation in the midst of a rapidly-changing and highly-competitive environment will gain significant advantages such as improved agility, increased efficiency, stronger growth prospects and reduced risk. Those not able to make the change will likely struggle to maintain their competitive edge over the coming years.

I would like to thank all of those who gave their time and insights to support the development of this research. To discuss any of the topics outlined in this report, or any other business issues, I encourage you to contact your local KPMG member firm or any of the contacts listed at the end of this report.



Anthony Coops
ASPAC Leader
Data & Analytics



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Survey findings

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A 'single view' for growth

As competitive pressures mount across the Asia-Pacific region, organizations of all types and sizes are starting to think about how they might better leverage their data to drive growth. Our network's experience and research suggest that those organizations that put their customers at the heart of their D&A strategies will be the ones that reap the greatest rewards.

It is not surprising that the vast majority of business decision-makers in Asia-Pacific now clearly recognize the potential value that D&A can deliver. Indeed, almost three-quarters of respondents (74 percent) said that D&A is already either very or crucially important to their current growth strategy.

"Asia-Pacific businesses are starting to focus their D&A strategies around three main imperatives: the growth agenda, the mitigation of risks and the reduction of costs," noted Anthony Coops, ASPAC Leader, Data & Analytics. "For the past 5 years, the focus has largely been on the risk side of the equation – improving reporting and compliance, for example – but organizations are now starting to recognize the value that D&A can provide to their growth strategy in terms of deeper customer insights and richer experiences."

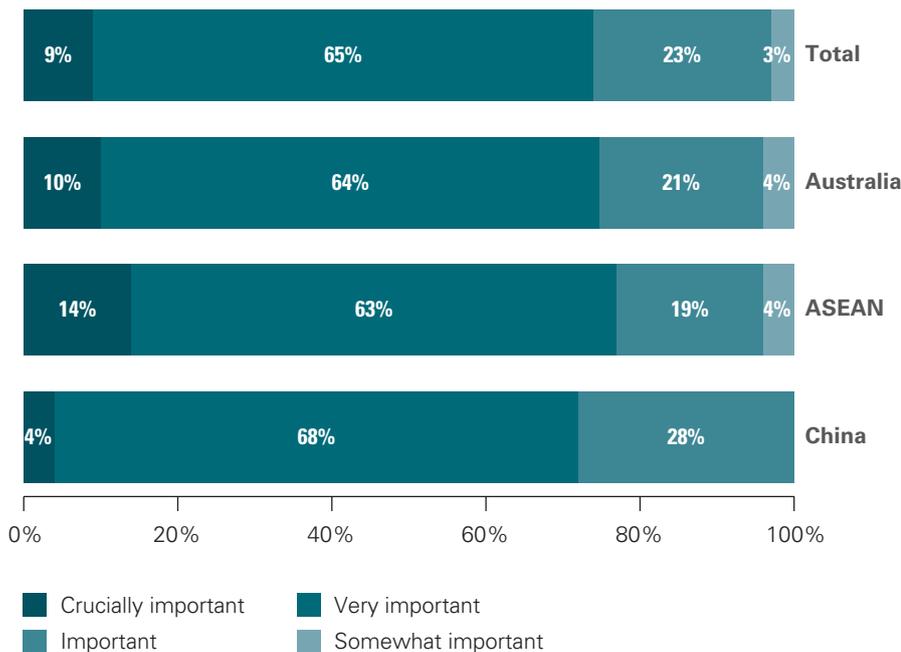


Asia-Pacific businesses are starting to focus their D&A strategies around three main imperatives: the growth agenda, the mitigation of risks and the reduction of costs.



Anthony Coops
ASPAC Leader
Data & Analytics

How important is the use of data and analytics to your company's current growth strategy?



Due to rounding, totals may not add up to 100%.

Source: KPMG International D&A survey, December 2014.

“

Growth really starts and ends with the customer, so if you can't get a 'single view' of your customers, then you really aren't seeing the full picture.

”

Egidio Zarrella,

Clients & Innovation partner
KPMG in China

It is also not surprising that data-driven organizations are now amongst some of the most valuable and popular in the world. Unburdened by legacy systems and siloed data, these organizations have developed a 'single view' of their customers that allows them to better understand the needs and values of their customers across the various touch-points and throughout the life-cycle. And, as a result, they have not only been able to better anticipate – and rapidly respond to – their customers' needs, they have also been able to use these insights to quickly enter into new market segments and seize growth opportunities as they emerge.

It is not only the lack of legacy systems that gives organizations in Asia-Pacific an advantage over their Western peers when it comes to achieving a 'single view' of the customer; the region has also benefited from the rapid adoption of mobile technology and growing internet penetration which has enabled organizations to move much closer to their customers and, in doing so, opened up access to a flood of new and valuable customer data.

“Growth really starts and ends with the customer, so if you can't get a 'single view' of your customers, then you really aren't seeing the full picture,” said Egidio Zarrella, Clients & Innovation partner, KPMG in China. “This isn't just about developing new products or better targeting market segments; leading organizations are using their deep customer insights to drive change across operations, supply chain and finance which, in turn, is leading to new growth opportunities and business models.”



4 A single view: putting customers at the heart of the D&A strategy

D&A maturity: the devil is in the details

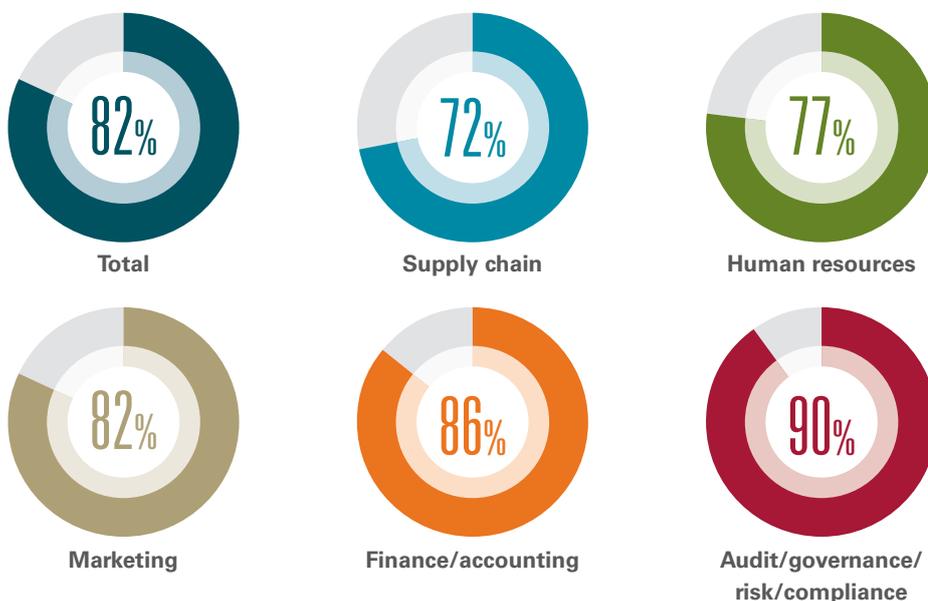
While the majority of Asia-Pacific organizations may think they boast fairly mature D&A capabilities, Our network's experience suggests that most are only just starting to scratch the surface. Many still seem to equate D&A to management information and reporting and, as a result, may not be seeing the opportunities that their competitors are already taking advantage of.

With almost three-quarters of all organizations across Asia-Pacific reporting that they have been using D&A for more than 5 years, our data suggests that most organizations should now enjoy fairly enhanced capabilities and rapidly-maturing strategies.

But according to our survey, this may not be the case. For example, only around a quarter of all respondents were able to confirm that their organizations were executing against a formal strategy for data governance and processes. Respondents were also more likely to say that their D&A strategy was driven by IT rather than by the business.

How effective do you believe your company currently is at leveraging analytics to enable data-driven decision-making?

Effective & extremely effective



Source: KPMG International D&A survey, December 2014.



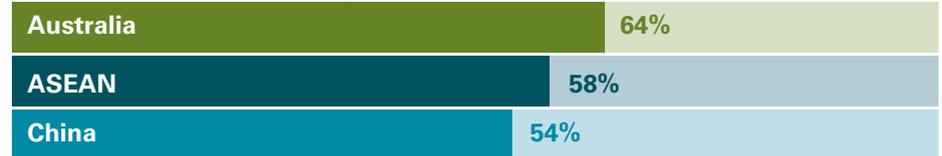
One area where Asia-Pacific organizations note strong progress is in their efforts to store and present data in a centralized fashion: a key capability for creating a 'single view' of the customer. But data warehousing and centralization also comes with its own problems and often does little to improve access or transparency across the organization.



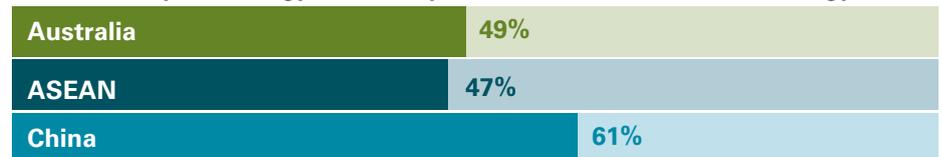
Egidio Zarrella,
Clients & Innovation partner
KPMG in China

How much do you agree with the following statements about your company's data and analytics? – “Agree” or “Strongly agree”

The data we use is stored and presented in a centralized fashion



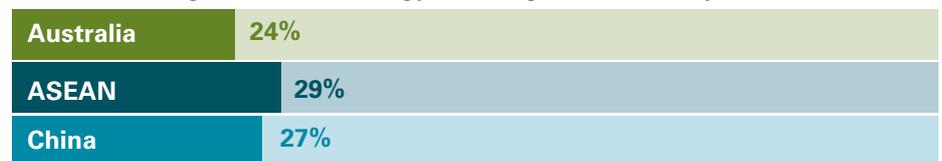
Data and analytics strategy is driven by IT but linked to our business strategy



Data and analytics strategy is driven and funded by business groups



We are executing on a formal strategy for data governance and processes



Source: KPMG International D&A survey, December 2014.

We believe that – as organizations start to recognize the value of deeper and more reliable customer insights – we should start to see the number of organizations with formal strategies increase as CEOs and business group leaders start to take ownership of their data and shift their culture towards insight-driven decision-making.

One area where Asia-Pacific organizations note strong progress is in their efforts to store and present data in a centralized fashion: a key capability for creating a 'single view' of the customer. But data warehousing and centralization also comes with its own problems and often does little to improve access or transparency across the organization.

Indeed, Our network's experience suggests that the vast majority of an organization's data never even comes into contact with the data warehouse and is therefore lost to decision-makers. Not surprisingly, our survey also finds that organizations are largely focused on harnessing their own structured internal data rather than so-called 'Big Data' sources.

What is clear, however, is that the key drivers motivating organizational D&A strategies seem to reflect the relative maturity of the market. In Australia, where markets are fairly mature and regulation high, respondents suggested their D&A strategies were primarily driven by customer-facing objectives and compliance requirements. Respondents from China identified drivers consistent with a market that is rapidly becoming more outward facing: improved business performance and better transparency.

Financial services blaze a trail

What allows one organization to grow while another falters? Our network's experience suggests that it is D&A. In virtually every business sector and geography, we have seen examples of innovative organizations re-engineering their structures and business models to take advantage of the new D&A landscape. Not surprisingly, financial services organizations seem to be in the lead.

Organizations in the financial services and insurance sectors reported having the most experience using D&A within their organizations, while the telecom services sector seemed to suggest only recently adopting D&A, with 43 percent admitting to only adopting analytics approaches within the last few years. Similarly, our survey finds that multinational organizations boast more experience using D&A within the organization than their more local or regional peers.

In part, these findings likely reflect the increased use of D&A in managing complex reporting and compliance requirements. In the financial services sector, where the national and international regulatory burdens are comparatively high, organizations have already developed fairly mature processes and strategies for managing data.

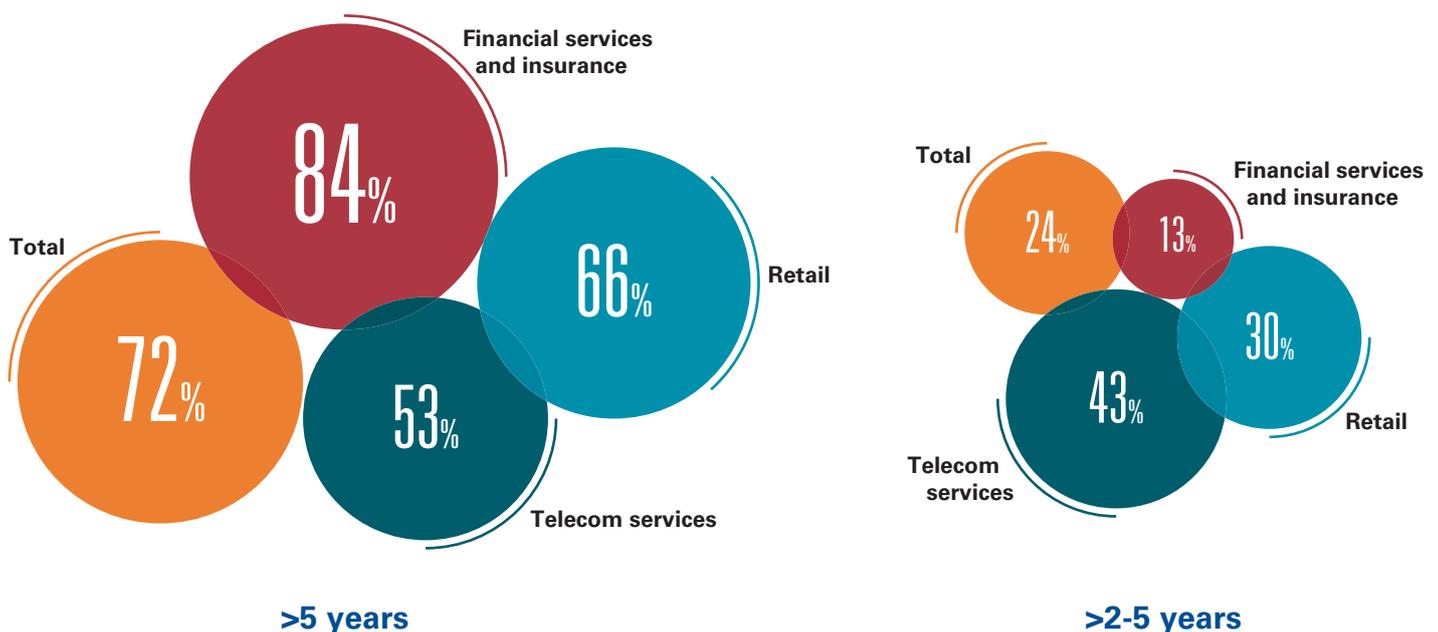


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Egidio Zarrella,
Clients & Innovation partner
KPMG in China

For how many years would you say your company has been utilizing data and analytics?



Source: KPMG International D&A survey, December 2014.



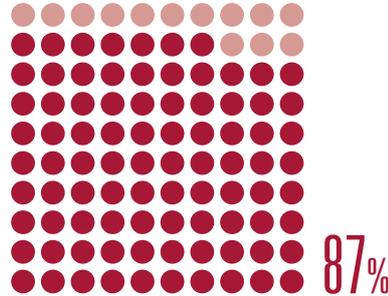
Today, small yet highly-analytical organizations are emerging and quickly stealing away market share by making better use of their data to drive real and valuable insights. It's not about size, it's about how well you know your customer and what they want.



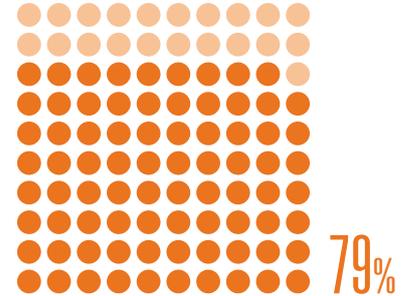
Anthony Coops,
ASPAC Leader
Data & Analytics

For how many years would you say your company has been utilizing data and analytics?

<5 years



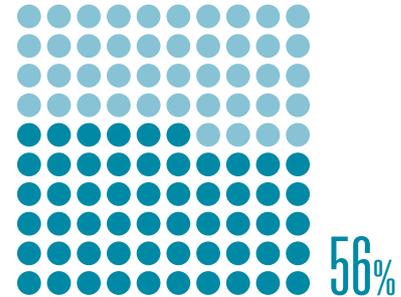
Multinational company (MNC)



State-owned enterprise (SOE)



Local/regional enterprise – publically listed



Local/regional enterprise – private

Source: KPMG International D&A survey, December 2014.

As competitive pressures across the region grow, organizations are starting to think about how they might apply their existing analytics capabilities to improve their customer insight and experience.

“I believe that – as Asian organizations start to gain more confidence in their analytics capabilities and invest in new technologies – we will soon see a dramatic shift in the way organizations behave and react to market opportunities,” noted Egidio Zarrella, Clients & Innovation partner, KPMG in China.

Already, we have seen Asia-Pacific organizations enjoying significant success by refocusing their organization around the customer. There are already a number of well-known banks that have enjoyed great flexibility and growth by leveraging their data-driven insights. Examples abound of small and nimble retail and telecoms organizations that have developed compelling customer propositions based on their knowledge of their customers.

Yet while our data suggests that bigger organizations – particularly multinationals – may currently have an advantage over local and regional enterprises, the reality is that they can no longer rely on their size and scale to dominate their markets.

“Today, small yet highly-analytical organizations are emerging and quickly stealing away market share by making better use of their data to drive real and valuable insights when they want it. It's not about size, it's about how well you know your customer and what they want,” noted Anthony Coops, KPMG in Australia.





Market snapshot

Australia

While Australian respondents rated their maturity highest within the region, the survey results and KPMG's research suggests that many organizations still have a long way to go before they become truly data driven. The ability to break down silos within the organization and create a foundation for success will be critical over the next 2 years.

Australian respondents rated themselves highest in the region in terms of D&A maturity and perceived effectiveness. Indeed, more than seven in 10 said they had been using D&A for more than 5 years, while nearly nine in 10 rated their effectiveness at leveraging analytics to enable decision-making as being either effective or extremely effective.

Interestingly, Australian respondents also noted a clear intention to adopt more predictive analytics in order to increase customer understanding and intimacy. This will likely include increasingly rich data from sources such as social media.

"Given the relative concentration of the Australian marketplace in financial services, retail and telecoms, it is not surprising that organizations are increasingly focused on customer experience and retention and cross-selling rather than traditional customer acquisition," noted Anthony Coops, ASPAC Leader, Data & Analytics.

According to our research, many Australian organizations already possess pockets of highly-sophisticated D&A usage and capabilities. More than seven in 10 say they have been using D&A in finance and accounting for more than 5 years; more than nine in 10 say they have been leveraging D&A within their marketing function to support customer segmentation and assess campaign effectiveness for a similar amount of time.

"Australian organizations intrinsically know that D&A is critical to their future

Key drivers for D&A in Australia

1. Improve customer experience and interactions
2. Ensure compliance and reduce risks
3. Improve business planning and performance monitoring.

For how many years would you say your company has been utilizing data and analytics?

<5 years



Source: KPMG International D&A survey, December 2014.



For many, the key to success will come from demonstrating the benefits of D&A within two or three narrow business areas and then using those results to demonstrate value and drive the business and investment case forward.



Anthony Coops
ASPAC Leader
Data & Analytics

success, but many face significant challenges ‘operationalizing’ their strategy across the enterprise,” added Coops. “For many, the key to success will come from demonstrating the benefits of D&A within two or three narrow business areas and then using those results to demonstrate value and drive the business and investment case forward.”

A great example of this is the explosion of social media as an important and dynamic data-set that can deliver deep insights and intelligence outside of the traditional sales and marketing domain. Making the most of this data requires a shift in mind-set from perceiving social media as a ‘one-way’ marketing medium, to understanding the qualitative and quantitative insights that can be discovered and how best to take action.

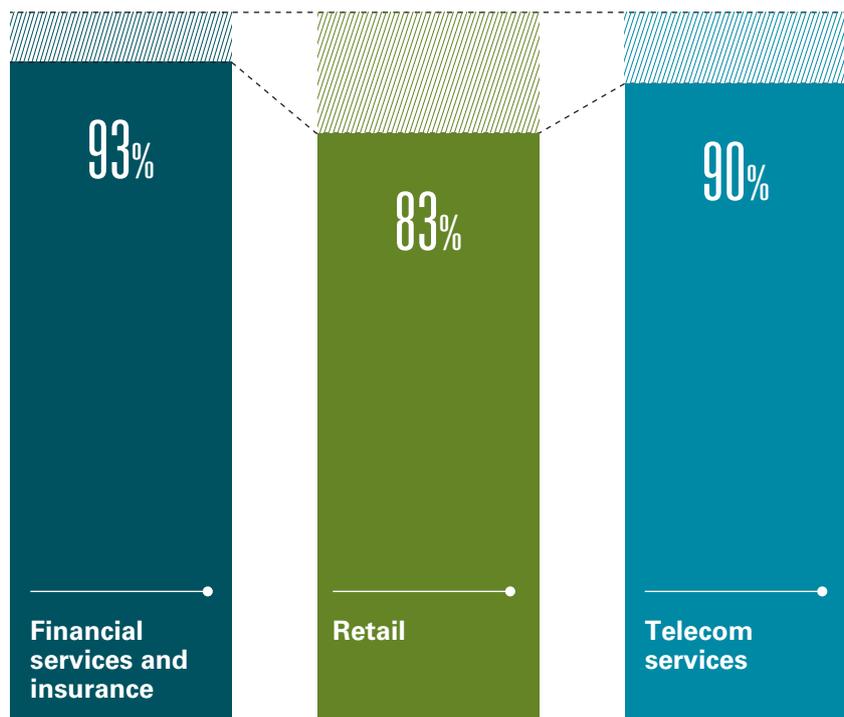
Key **challenges** for D&A in Australia

1. Data security and privacy
2. Lack of business C-level executive support for the D&A strategy and needs
3. Inability to respond quickly enough to market demand.

Financial services lead the way in Australia

Consistent with the general findings across the region, financial services organizations in Australia returned the highest rankings in terms of effectiveness, maturity and capability.

How effective do you believe your company currently is at leveraging analytics to enable data-driven decision-making? (Effective or extremely effective)



Source: KPMG International D&A survey, December 2014.

Eight in 10 financial services and telecoms respondents also said that D&A would be crucially important to their business going forward, versus just two-thirds of retail respondents.

In large part, this is likely due to the long history and clear focus in these sectors on leveraging data and reporting tools to better manage regulatory reporting and compliance requirements. Banks in Australia also report significant focus on enhancing their predictive analytics capabilities in order to increase customer understanding and reduce the risk and impact of fraud.

While the retail sector likely has strong experience using D&A to improve customer profitability and loyalty, their relative lack of regulatory reporting requirements has meant that D&A capabilities have remained very siloed within sales and marketing. As financial services and telecoms organizations start to place a greater focus on improving their customer service, we expect to see these two sectors leap ahead as more and more use cases come to light and capabilities are shared across departments.

Not surprisingly, banking, insurance, retail and telecoms are some of the most discussed brands and topics in social media. Yet while many see this as a bad thing, we believe that those organizations able to harness these conversations will be better prepared to improve engagement, products and services. Those that incorporate social media D&A into their strategy should also be able to hear the 'signals' in the noise which, in turn, should help them locate emerging trends and the 'unknown unknowns'.

KPMG's five key recommendations

Don't boil the ocean

Focus on answering two or three key business questions to start, then leverage your experience and capabilities into other areas of the business.

01

Put the business at the center

While IT must be an enabler of D&A, demonstrating value will require the business to ensure that investments are aligned to business objectives.

03

Break down the silos

Organizations must urgently focus on improving processes to share data, best practices, capabilities and strategies across the organization.

05

Focus on operationalization

Many organizations spend far too long thinking about what the ideal 'end state' would be rather than focusing on making real and sustainable changes.

02

Success breeds success

Gaining executive and organizational support for D&A investments will require lots of use cases and proof points that clearly demonstrate the business value of D&A.

04

Source: KPMG International D&A survey, December 2014.

ASEAN

With much of the current D&A activity in key ASEAN markets still focused on static performance reporting and basic analysis, there appears to be significant opportunity for organizations in the region to gain competitive advantage by taking small, yet incremental, advances towards creating a data-driven culture.

While ASEAN respondents were slightly more likely to see D&A as being crucially important to their growth strategy than others in the region, they were also around twice as likely as their peers to rank their effectiveness in D&A as low.

The highest levels of maturity for the region were reported in the areas of finance and governance, suggesting a high focus on leveraging D&A capabilities to support performance reporting.

That being said, the region is far from homogenous, with significant differences emerging between key ASEAN markets. Data from Singapore, for example, suggests that organizations in this country are starting to shift the focus of their D&A strategy towards more growth-oriented drivers, particularly those related to customer insight and management.

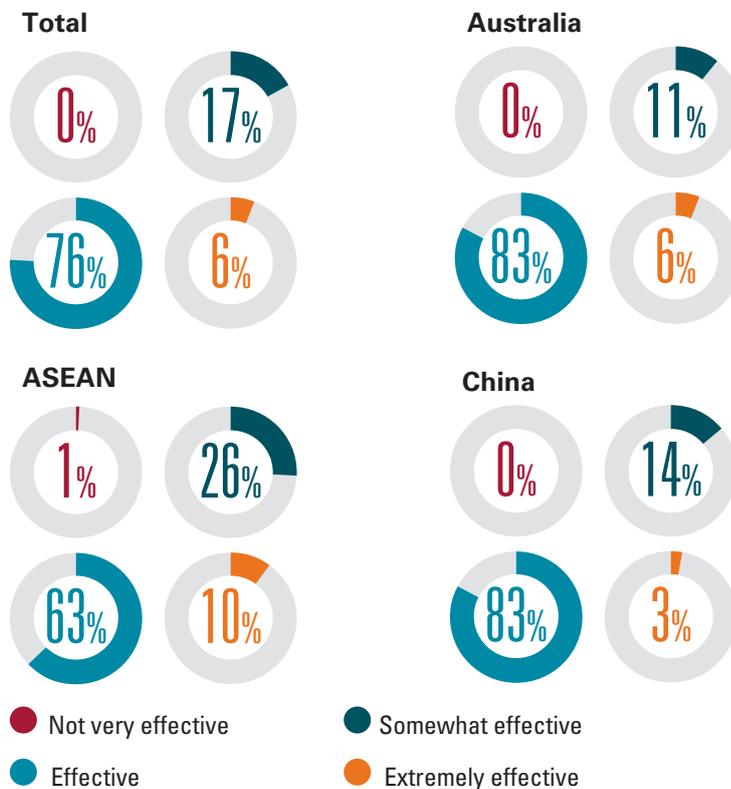
Indonesia, on the other hand, continues to focus their D&A investments on improving access to information and were the least likely across ASEAN to see customer insight and management as an important driver. In the Philippines, D&A strategies seem to have been largely led by IT, suggesting that there is still significant opportunity for aligning D&A investments with business objectives.

“With large consumer markets and increasing competition in most ASEAN markets, we see massive potential for the application of advanced D&A capabilities such as real-time analysis, visualization and predictive capabilities,” said Tom Mouhsian, partner, KPMG in Singapore. “But ASEAN organizations

Key drivers for D&A in ASEAN

1. Ensure compliance and reduce risk
2. Improve access to information
3. Achieve better business transparency.

How effective do you believe your company currently is at leveraging analytics to enable data-driven decision-making?



Due to rounding, totals may not add up to 100%.

Source: KPMG International D&A survey, December 2014.

Key challenges for D&A in ASEAN

1. Inability to respond quickly enough to market demand
2. Data security and privacy
3. Lack of appropriate tools.

must not become overwhelmed by the size of the task; much can be done with existing systems and capabilities to start the transformation towards creating a data-driven and analytics-led culture.”

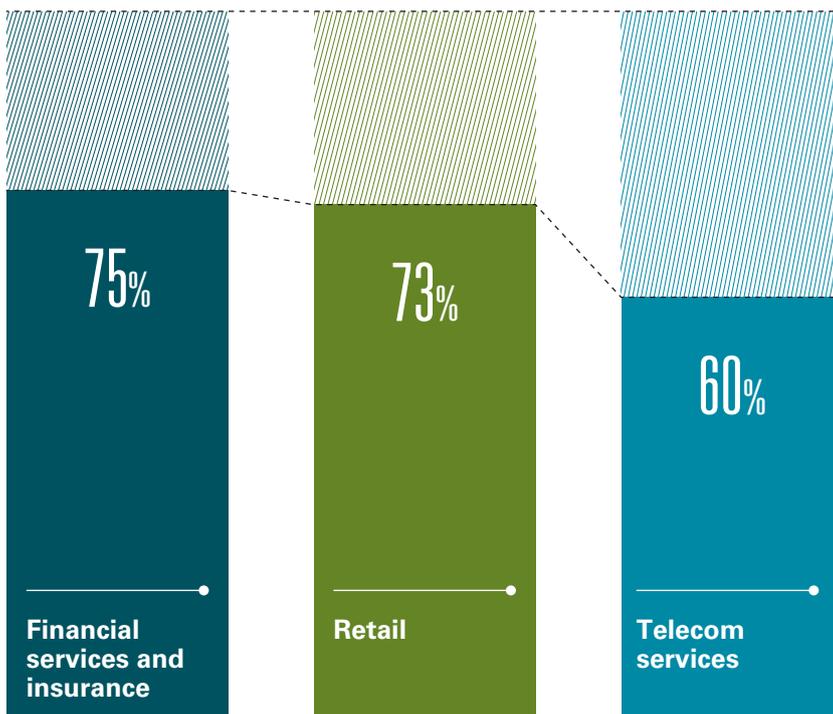
Shifting from reporting to customer insight and management

Across the ASEAN region, financial services organizations report the highest levels of maturity and are the most likely to say they are executing on a formal strategy for data governance and processes.

Interestingly, while retail respondents returned fairly high reports of maturity, they were less likely to say they have a formal organizational structure in place for analytics support and were also less likely to have a formal data strategy.

For organizations in both the retail and telecom sectors, the inability to respond quickly enough to market demand emerged as one of the most critical challenges, suggesting that increased competition for customers will start to force customer insight and management to the top of the D&A agenda.

How effective do you believe your company currently is at leveraging analytics to enable data-driven decision-making? (Effective or extremely effective)



Source: KPMG International D&A survey, December 2014.



ASEAN organizations must not become overwhelmed by the size of the task; much can be done with existing systems and capabilities to start the transformation towards creating a data-driven and analytics-led culture.



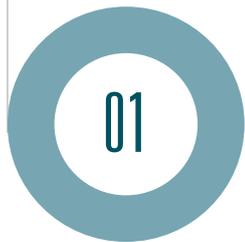
Tom Mouhsian
Head of Customer &
Growth practice
ASEAN region

“Organizations in all industry verticals across the ASEAN region will need to start thinking about how they apply their D&A capabilities to improve business agility and help them respond to fast-changing consumer behaviors,” added Mouhsian. “As consumers become more technologically-savvy and better connected, the pressure to respond to emerging trends will only increase.”

KPMG's five D&A imperatives for ASPAC

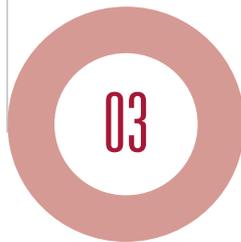
Understand demand

Start by identifying who the internal 'consumers' of data are within the organization and what they need to achieve their objectives; mapping 'Big Data' into 'Smart Data' is a critical aspect of this task.



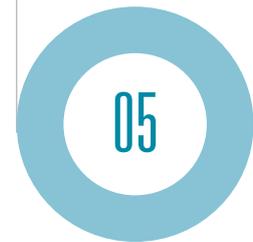
Galvanize governance

Certain types of data demand more sensitive handling due to either regulatory compliance or risk management, and therefore may require organizations to develop strict governance and ensure absolute adherence to set protocols.



Focus on the customer

D&A isn't just about creating benefits for the organization; at least an equal amount of attention should be directed towards leveraging insights to create tangible benefits for the end-customer – ultimately these are the stakeholders that pay for the D&A 'party'.



Synchronize strategy

A robust data strategy must be both tactical and practical, and should be structured to positively reflect the priorities of each stakeholder in order to deliver on the needs of the business.



Create capability

While systems and technologies are critical enablers of a D&A strategy, it is equally important that organizations have people who know how to work with data and, more importantly, how to make sense of it.



Organizations in all industry verticals across the ASEAN region will need to start thinking about how they apply their D&A capabilities to improve business agility and help them respond to fast-changing consumer behaviors.



Tom Mouhsian
Head of Customer & Growth practice
ASEAN region

China

All evidence suggests that D&A is maturing faster – and more efficiently – in China than in many other parts of Asia and the world. As the D&A ecosystem strengthens and better use cases for analytics come to light, Our network believes China will quickly become one of the most sophisticated D&A markets in the world.

The fact that organizations in China have recognized the potential value of D&A is undeniable. Seventy-two percent of all respondents from China say that D&A is either very or crucially important to their growth strategy; 86 percent say they are currently either effective or very effective at leveraging analytics in their decision-making.

However, evidence suggests that much of the D&A activity that has taken place in China over the past few years has been predominantly focused on reporting. Almost all respondents (92 percent) say they have been using D&A in their human resources function for more than 5 years; almost three-quarters (73 percent) say they have been using D&A for finance and accounting for a similar length of time.

Interestingly, respondents from China reported being somewhat less focused on using D&A to improve the customer insight and management than their peers in ASEAN and Australia. In particular, only 20 percent of China's state-owned enterprises (SOEs) said that they see customer insight and management as a key driver for their D&A strategy.

"As D&A technology prices drop and accessibility increases, we've seen rapid uptake of D&A approaches across the Chinese market. Human resources and finance may be where the most extensive experience resides, but that should not suggest that organizations in China are not equally focused on

Key drivers for D&A in China

1. Improve business planning and performance monitoring
2. Achieve better business transparency
3. Gain market differentiation with product and service innovations.

For how many years would you say your company has been utilizing data and analytics?

<5 years



Source: KPMG International D&A survey, December 2014.



While all industry sectors across the China market seem to face similar challenges – particularly in being able to keep up with market and customer demand – our survey suggests that D&A challenges and approaches vary by sector.



Egidio Zarrella,
Clients & Innovation partner
KPMG in China

improving the customer insight and management or achieving more efficient supply chain operations by leveraging advanced D&A approaches. I believe that – if China keeps up its current trajectory – the country will soon become one of the most active and most mature D&A markets in the world,” said Egidio Zarrella, Clients & Innovation partner, KPMG in China.

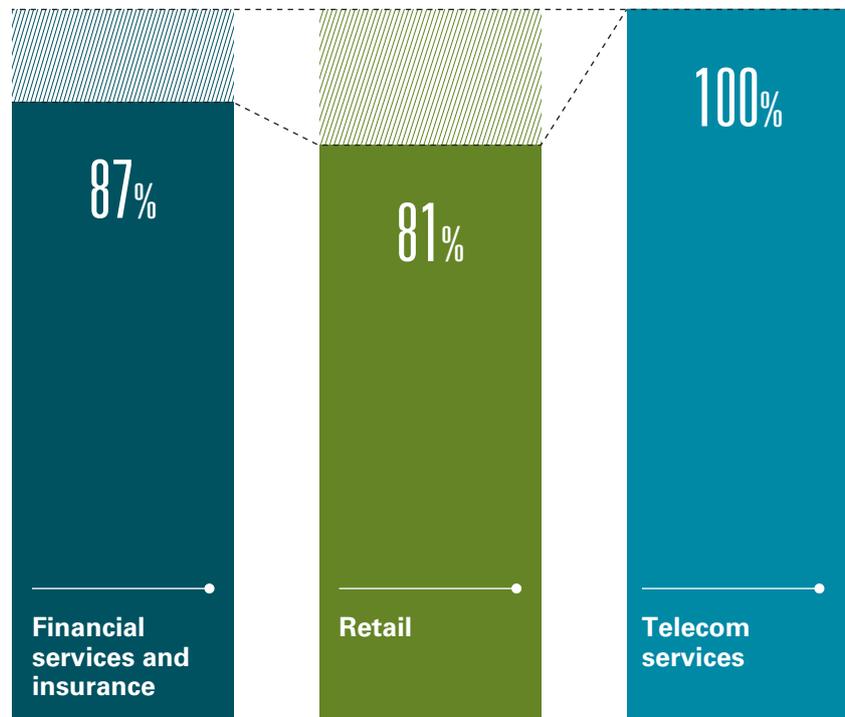
Key **challenges** for D&A in China

1. Inability to respond quickly enough to market demand
2. Lack of training on D&A tools
3. Lack of business C-level executive support for the D&A strategy and needs.

Tools, talent and training challenge industry sectors

While all industry sectors across the China market seem to face similar challenges – particularly in being able to keep up with market and customer demand – our survey suggests that D&A challenges and approaches vary by sector.

How effective do you believe your company currently is at leveraging analytics to enable data-driven decision-making? (Effective or extremely effective)



Source: KPMG International D&A survey, December 2014.

More than half of retailers surveyed in China, for example, said that they lack D&A talent (thereby reducing their ability to link D&A to business performance), whereas telecom providers tended to point to a lack of appropriate tools and IT support. Banks and financial services organizations also said they were concerned about the lack of tools, as well as challenges related to training staff in new approaches and processes.

“Those organizations that continue to view D&A as primarily a technology challenge will always struggle to link business outcomes and demands to investment in D&A. In reality, the technology and tools should be the last concern; the greater challenge should be in ensuring that the business is asking the right questions and using the right data to drive real and actionable business insights,” added Zarrella.

KPMG's suggested next steps to extracting value from D&A investments

Ask the right questions

If you don't know what questions to ask the data, you won't get the right insights in return; think clearly at the start about what you want to learn from your data.

01

Design the optimal approach

Driving value from D&A investments is about more than systems and processes; it's about creating the right approach within the right culture to change the way the business operates.

03

Broaden the horizons

Once a foundational set of capabilities and skills are achieved, organizations should encourage the business to explore what else may be possible by leveraging existing systems, capabilities and approaches.

05

Create the data strategy

Rather than trying to collect more data, organizations need to start by thinking about how they control and structure their current data to improve access and quality of insights.

02

Source the technology

While many see this as the first step in the D&A process, the reality is that it should be the last; spending money on technology without a data strategy and approach will never deliver value.

04

How KPMG can help

KPMG's global network of member firms' knows how to turn data into value. After all, we have decades of experience analyzing tax, audit and business data to help organizations drive competitive advantage.

Leading organizations choose KPMG's network because our approach to D&A is different. We combine deep business experience with leading capabilities and proven technology solutions to help clients make better, faster decisions in all areas of their business.

And, in doing so, KPMG member firms' help organizations go beyond their data to increase revenue, reduce costs and manage risk throughout the enterprise.

- **Grow your business** – from stronger, more profitable customer relationships and competitive advantages through to the discovery of new revenue and growth opportunities, our network understands how to harness data to drive growth.
- **Manage your risks** – find better ways to mitigate risk, manage regulation and improve controls across your organization. KPMG's network of data-savvy business professionals can show you how to improve your data quality and decision-making confidence.
- **Enhance your cost** – get more from your investments and resources, take out costs and improve efficiency. KPMG's network can show you how to leverage the data you already have to make smarter business decisions.



About the research

This report was developed in partnership with Forrester Research and is based on the responses of 213 senior business decision-makers across five key countries: Australia, China, Indonesia, the Philippines and Singapore. Responses were evenly distributed between Australia, China and ASEAN (consisting of respondents from Indonesia, the Philippines and Singapore). Half of all respondents represented companies with more than 5,000 employees and 21 percent of respondents said they represented a multinational organization. The survey was conducted in May 2014.

The data was also supported by 15 in-depth qualitative interviews conducted by Forrester with executives in Australia, China and Indonesia, and augmented with Forrester's existing research and secondary research conducted for this report.

Comments, analysis and insights have been provided by KPMG's network of subject matter experts and thought leaders across Asia-Pacific.



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Insights

KPMG's global network understands what it takes to cut through the complexity of data. At KPMG, we combine sophisticated data science with deep business expertise to help organizations go beyond the data to achieve actionable insights and create sustainable growth.

Other publications



Going beyond the data

Read our survey report, *Going beyond the data*, to understand more about the challenges executives are facing as they integrate D&A into their organizations.



Customer Experience Barometer

KPMG's *Customer Experience Barometer* is based on an in-depth survey of 5,000 consumers across five major markets and five key service sectors.

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