

BUILDING the **FUTURE** **TOGETHER**



Please wear you mask
during all session

DEWAYNE ABLES

IDENTIFYING EMERGING MARKETS

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Research | Relaunch | Recover



LEADERSHIP | CHALLENGE

1. What decisions do you or your leaders need make?
2. How can your team **emerge and innovate** to take over as a preferred expert advisor with clients in your communities?



LEADERSHIP | CHALLENGE

2020 the Year of
Disruptions!

What about in the Past?



HISTORICAL DISRUPTIONS?

What disruptions have you seen throughout your career?

CHANGES?

How did it change your business?

A LEADER'S RESPONSE

Was the change intentional?

Did your leaders:

- Discover opportunities with clients or employees early on?
- Make intentional decisions?
- Innovate solution & services?
- Relaunch adequately?

Did the disruption control them, or did they take advantage of the disruption for a greater good?

LEADERSHIP | CHALLENGE

2020 the Year of
Disruptions

Opportunity!



THE TIME IS NOW!

2021 | The Year of Transition



THE TIME IS NOW!

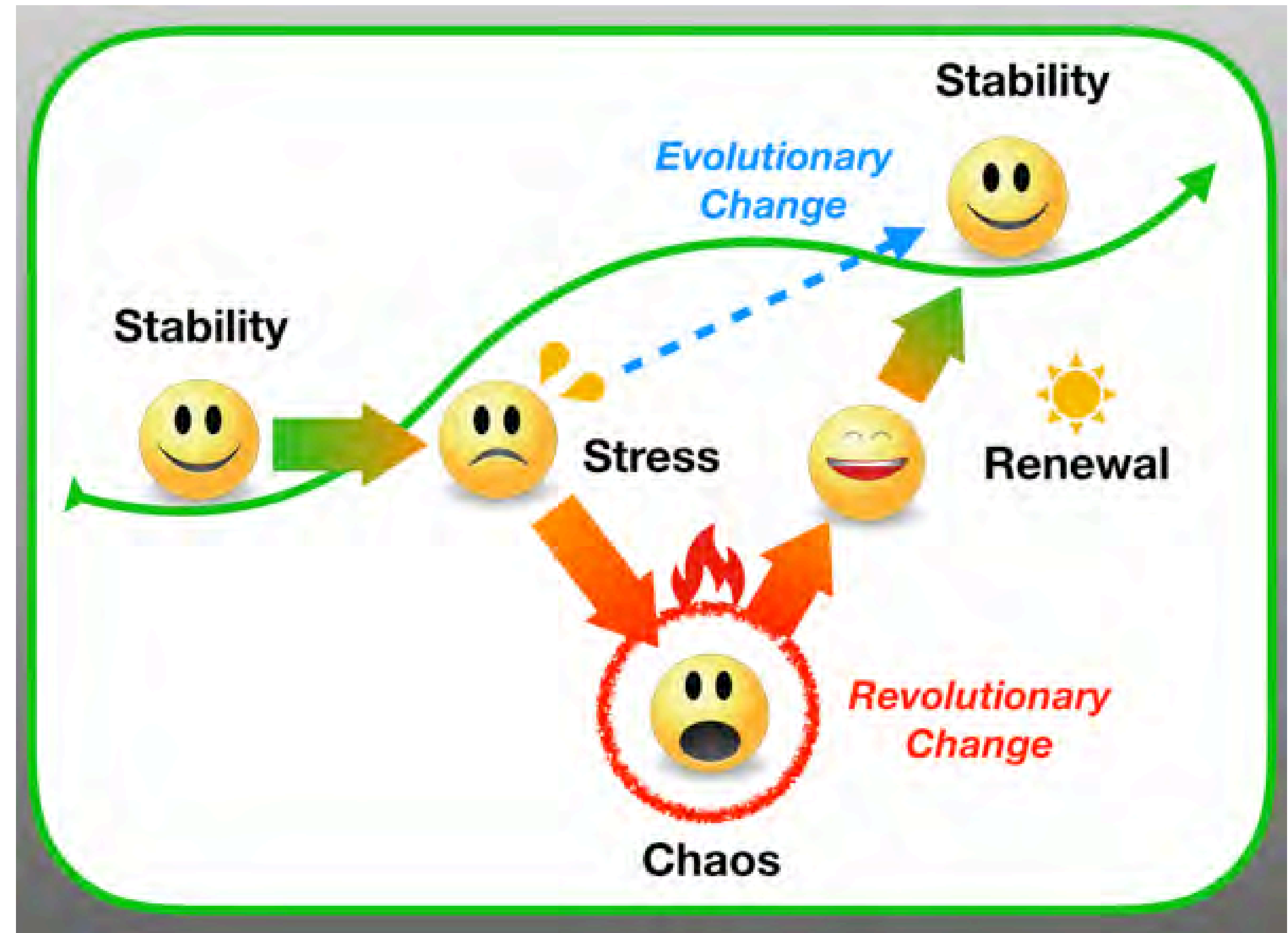
2022 | **GO TIME**



RESEARCH | NEEDS

We all **exist to serve needs** of Clients & Communities.

Disruptions cause **old needs to change** and drives new ones!



<https://www.eman8.net/change/the-dynamics-of-change/>

RESEARCH | MARKET SHIFTS

1. How is the **disruption** effecting your Markets?
2. What's **driving** the opportunities?
3. What **industries** or **geographies** are emerging?
4. What industries or geographies are **declining**?
5. How long?

Who: Executive Decisions

ADVANCED RETAIL SALES

Kind of Retailer	Percent Change		
	M/M	Y/Y vs '20	Y/Y vs. '19
1. Total Retail	0.0%	51.2%	21.0%
2. Motor vehicle & parts dealers	2.9%	104.5%	36.5%
3. Furniture & home furn. Stores	-0.7%	196.4%	22.3%
4. Electronics & appliance stores	1.2%	139.0%	12.1%
5. Building material & garden equi	-0.4%	33.8%	39.6%
6. Food & beverage stores	0.4%	1.5%	14.4%
7. Health & personal care stores	1.0%	24.7%	13.4%
8. Gasoline stations	-1.1%	76.1%	5.8%
9. Clothing & clothing accessories	-5.1%	726.8%	5.1%
10. Sporting goods, hobby, musical	-3.6%	155.0%	41.9%
11. General merchandise stores	-4.9%	15.1%	9.2%
12. Department stores	-1.9%	72.5%	-4.5%
13. E-commerce	-0.6%	14.5%	41.8%
14. Bars and Restaurants	3.0%	116.8%	2.0%

Vs. 2019 (pre-Pandemic)

E-commerce	+41.8%
Sporting Goods	+41.9%
Home Improvement	+39.6%
Food and Beverage	+14.4%
Health and Personal Care	+13.4%
Autos	+36.5%
Furniture	+22.3%
Electronics/appliances	+12.1%

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Clothing	+5.1%
Department stores	-4.5%
Restaurants	+2.0%
Gas Stations	+5.8%

Demand: Construction Activity Accelerating, Will Be Strong in 2022

- Total construction spending was 9% higher Y/Y through December.
- Sectors that are expected to accelerate in 2022 include:
 - Manufacturing
 - Health care
 - Education
 - Highway and street (Infra. Bill)
 - Communication (Infra. Bill)
 - Amusement and recreation
 - Lodging

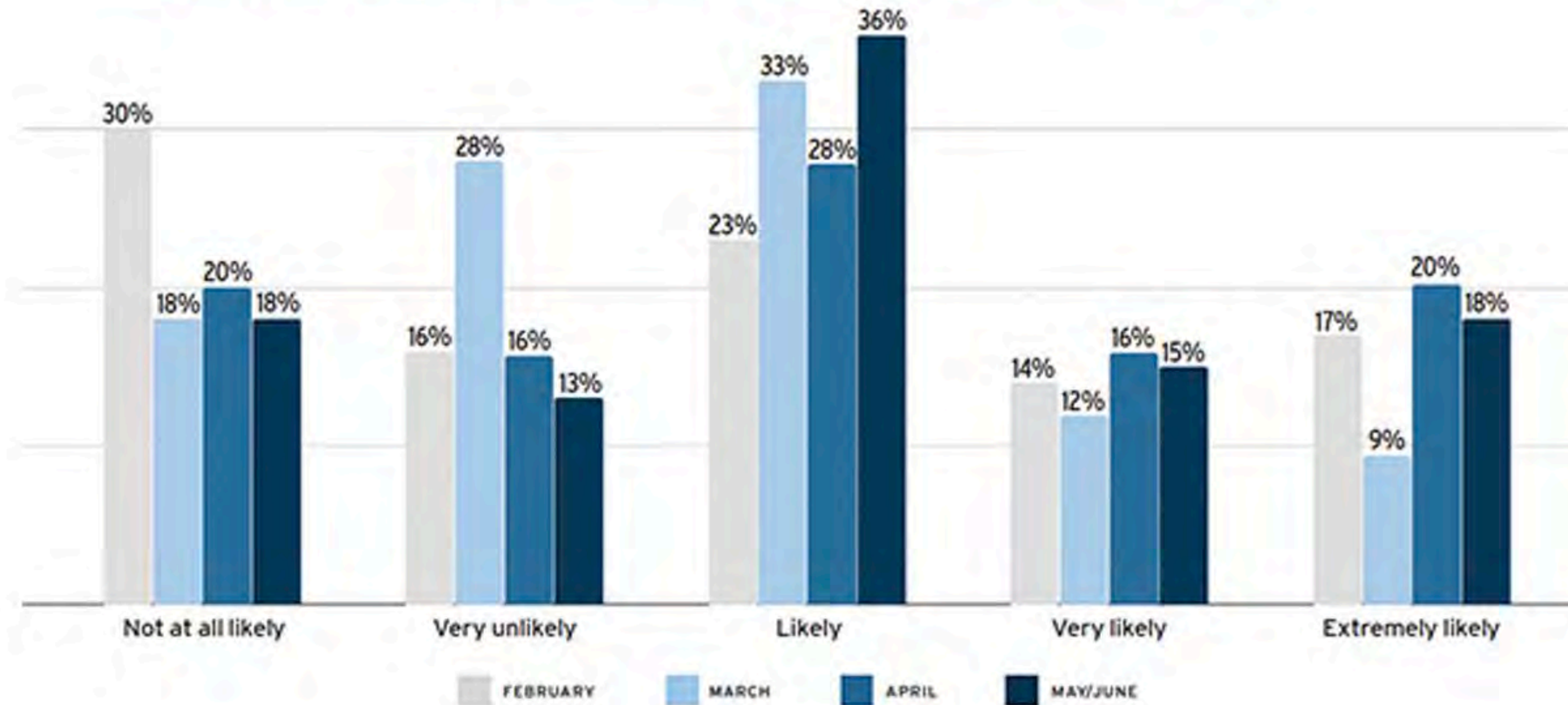
Type of Construction:	Annualized Construction Spending (Millions of Dollars)			Percent change Dec 2021 from -	
	Dec 2021	Nov 2021	Dec 2020	Nov 2021	Dec 2020
Total Construction	1,639,864	1,636,525	1,504,188	0.2	9.0
Residential	819,135	810,106	713,995	1.1	14.7
Nonresidential	820,729	826,419	790,192	-0.7	3.9
Manufacturing	86,414	88,062	66,229	-1.9	30.5
Commercial	94,808	94,898	81,144	-0.1	16.8
Water supply	19,206	19,359	17,778	-0.8	8.0
Power	115,026	114,957	106,826	0.1	7.7
Health care	49,445	50,158	46,263	-1.4	6.9
Office	83,827	83,484	79,991	0.4	4.8
Sewage and waste disposal	26,843	27,930	26,440	-3.9	1.5
Highway and street	104,257	103,925	102,812	0.3	1.4
Amusement and recreation	25,999	25,825	25,762	0.7	0.9
Communication	21,962	22,047	21,937	-0.4	0.1
Conservation and development	7,921	8,031	7,969	-1.4	-0.6
Transportation	55,976	57,261	58,985	-2.2	-5.1
Educational	97,927	98,947	105,219	-1.0	-6.9
Religious	3,122	3,161	3,379	-1.2	-7.6
Lodging	17,979	17,652	23,984	1.9	-25.0
Public safety	10,017	10,723	15,475	-6.6	-35.3

RE-SHORING AND NEAR SHORING MANUFACTURING TRENDS

Opportunity:
69% Likely,
Very Likely, or
Extremely
Likely to Re-
shore in the
Future

INCREASED INTEREST IN RESHORING: 69% OF MANUFACTURERS INDICATE THEY ARE "LIKELY TO" OR "EXTREMELY LIKELY TO" RESHORE IN THE FUTURE

How likely are you to bring more production/sourcing back to North America after this outbreak?



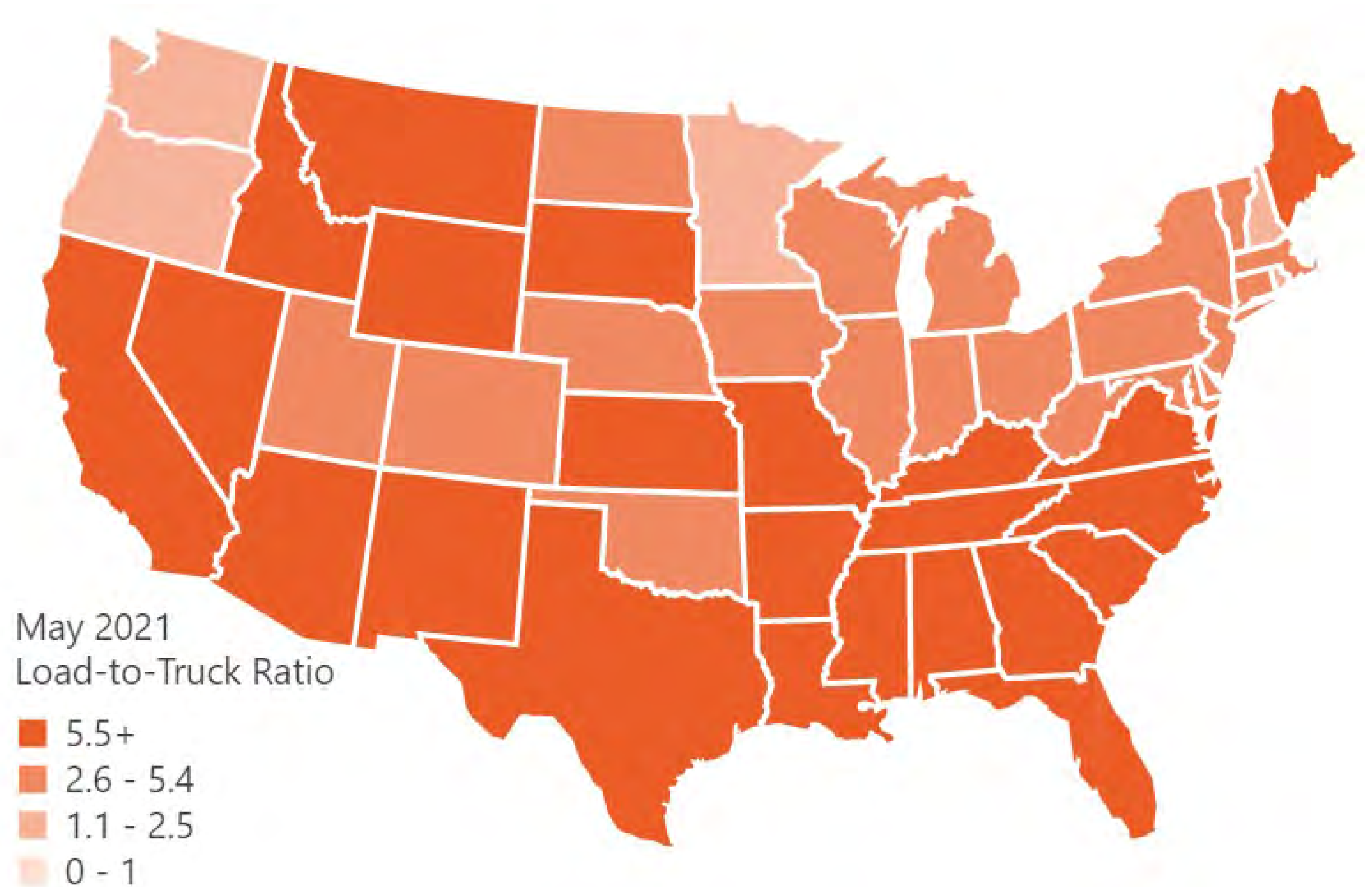
Source: PWC; Gartner

NEAR-SHORING / RE-SHORING IMPACT ON TRANSPORTATION

Transportation and distribution freight flows will change as these trends take hold.

Will push construction of:

- **Infrastructure**
- **Warehousing**
- **Multi-Modal Facilities,**
- **Distribution (inland ports, terminals, lots, rail facilities, bridge improvements, etc.).**



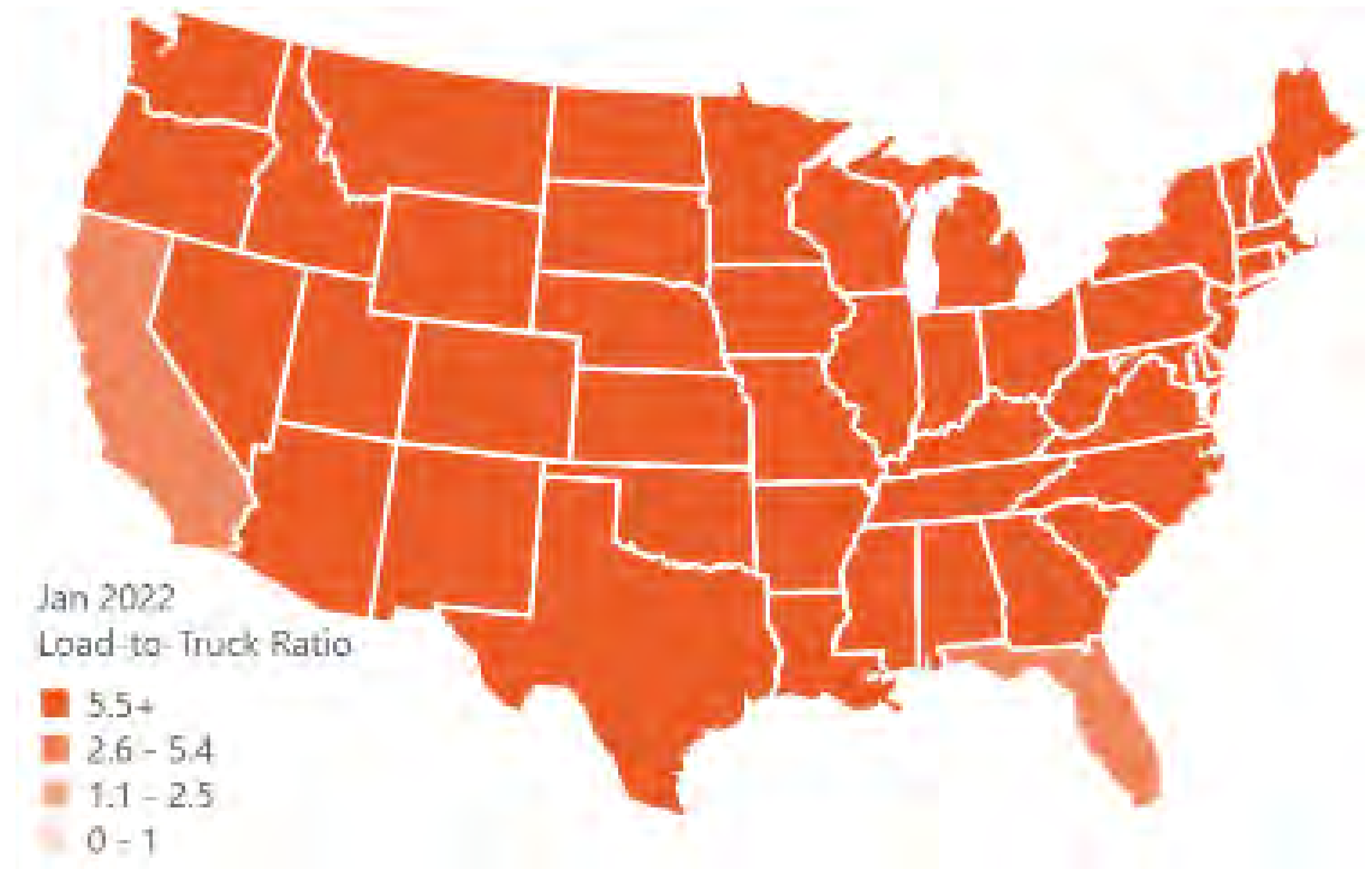
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RESEARCH | CHANGING NEED OF CLIENTS

1. How is the **disruption** effecting your Clients & Prospects?
2. How is it effecting their customers?
3. How are your client's **needs changing**?
4. **New needs**?

Who: Mangers | VPs | PMs

RESEARCH | CHANGING NEED OF CLIENTS

1. How is the **disruption** effecting your Clients & Prospects?

- Use it to **develop your leaders**
- Allow emerging leaders to be seen as expert
- Connect them to their importance & the need
- Define how they could impact clients and communities

Download **Script & Questions** For Your Leaders to Use:

pioneeriq.com/smacnapinp



LEADERSHIP AT EVERY LEVEL



Great Leaders Create Leaders
We have a SHORTAGE

RELAUNCH: PLAN & PREPARE

Decide | Plan | Prepare

- Vision
- Markets
- Solutions



RELAUNCH: PLAN & PREPARE

Decide | Plan | Prepare

Markets:

- ? Industries and Geographies to Expand | Enter | Exit
- ? Reprioritize Customer & Prospects
- ? **Needs** You Will Serve

Key: follow the **needs** of your markets

RELAUNCH: PLAN & PREPARE

Decide | Plan | Prepare

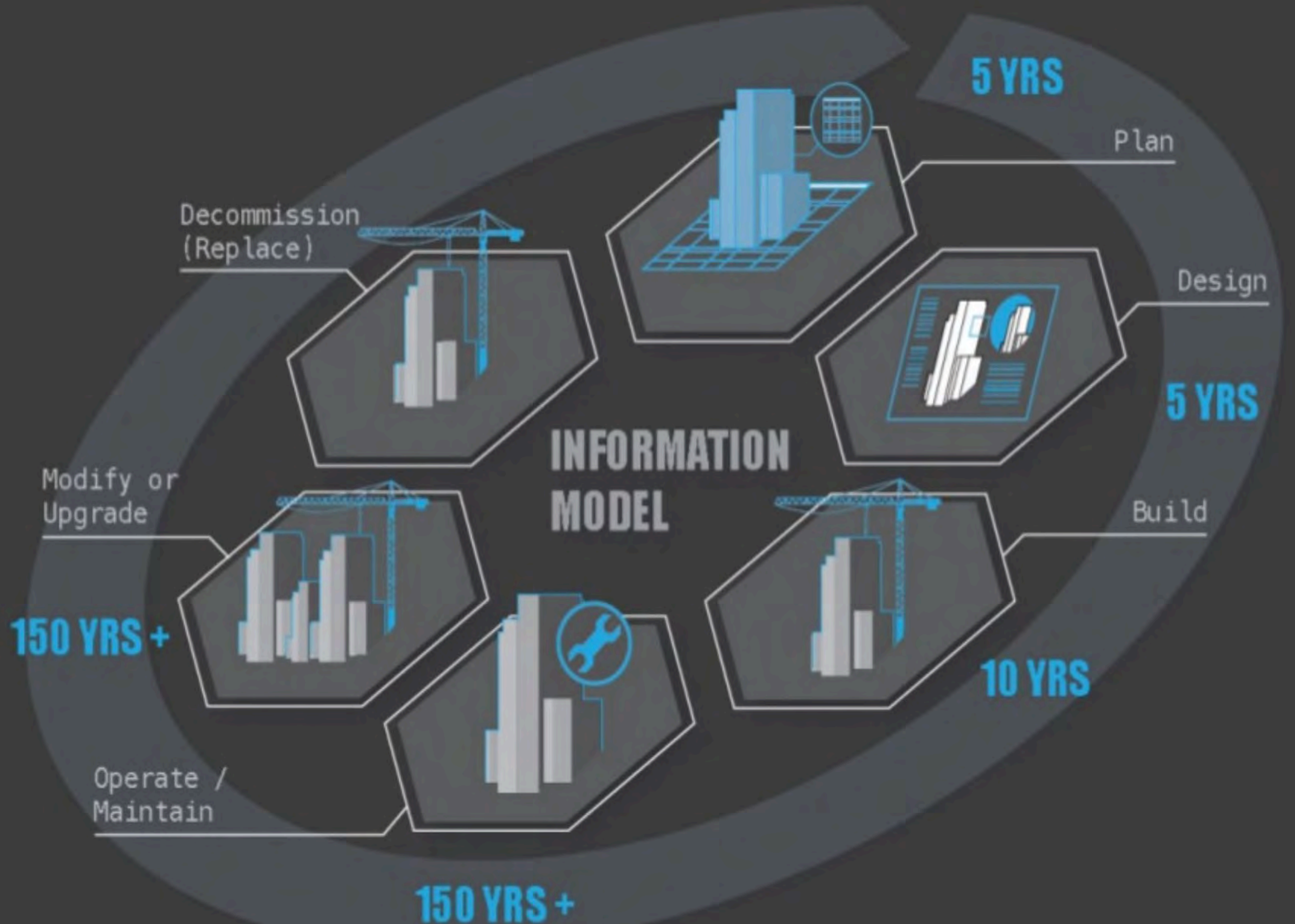
Solution:

- ? Where Do You Want to Engage within Client Need Spectrum?
- ? Change **Your Solution to Meet the Needs**
- ? New Services or Technologies
- ? Your Customer's Experience?

Gut Check: Will You **Imitate, Innovate or Invent**

When Do
You Want to
Engage?

Is there an
earlier step?



RELAUNCH: PLAN & PREPARE

Decide | Plan | Prepare

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RECOVER | MOVE FORWARD

- What **impact** do you want your firm to have as your employees, customers markets & communities recover?
- Decision: **impact on employees?**
- Decision: **impact on customers?**
- **#staystubborn**

RECOVER | 3 TECHNIQUES

What's most important to immediately implement?

Cadence with your Leaders and Teams!!!

RECOVER | 3 TECHNIQUES

What's most important to immediately implement?

Cadence with your Leaders and Teams!!!:

1. Define the Direction
2. Customer Feedback
3. Prioritize & Calibrate

A **Consistent** Cadence Trumps a Great Plan

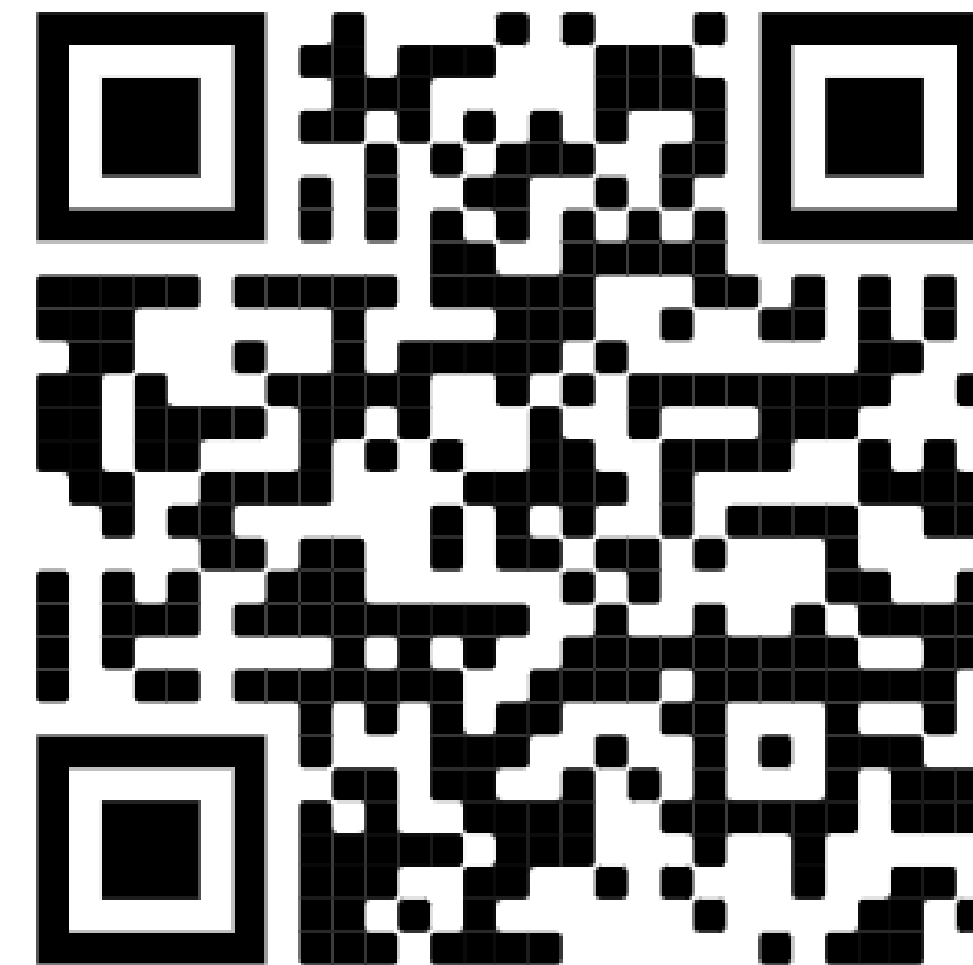
DEPLOY YOUR LEADERS



CUSTOMIZE YOUR



What markets should **YOUR TEAM** get into, out of, or expand?



LEADERSHIP | CHALLENGE

2022 is GO TIME!

How are YOU Responding?



The background is a complex isometric technical drawing of a mechanical assembly, rendered in a light blue color. It features various components like gears, shafts, and housing parts, all arranged in a perspective view. The overall color scheme of the image transitions from a deep blue on the left to a vibrant red on the right.

PLEASE REMEMBER TO FILL OUT YOUR BREAKOUT
SURVEY ON THE APP

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