



Brandon Hall Group

EXCELLENCE AWARDS 2023

Storytelling, Data Visualization Training Transforms Colgate-Palmolive Teams into Key Communicators

Colgate-Palmolive and The Presentation Company
Best Advance in Competencies and Skill Development
September 2023



Company Background



COLGATE-PALMOLIVE

| Company-at-a-Glance | |
|--|--|
| Headquarters | 300 Park Ave., New York, NY |
| Year Founded | 1806 |
| Revenue | 17 billion USD |
| Employees | 34,500 employees |
| Global Scale (Regions that you operate in or provide services to) | <ul style="list-style-type: none"> • North America • Latin America • Europe • Asia Pacific • Africa/Eurasia |
| Customers/Output, etc. (Key customers and services offered) | Colgate is a caring, innovative growth company that is reimagining a healthier future for people, their pets and our planet. |
| Industry | Consumer Goods |
| Stock Symbol | NYSE: CL |
| Website | https://www.colgatepalmolive.com |



Company Background

THE PRESENTATION COMPANY™

| Company-at-a-Glance | |
|--|--|
| Headquarters | Beaverton, OR |
| Year Founded | 2001 |
| Revenue | Privately held |
| Employees | 21 full time + contractors |
| Global Scale (Regions that you operate in or provide services to) | <ul style="list-style-type: none">• North America• Latin America• Europe• Asia Pacific• Africa/Eurasia |
| Customers/Output, etc. (Key customers and services offered) | <p>For over 20 years, The Presentation Company (TPC) has offered award-winning, best-in-class corporate training that helps teams bring clarity and meaning to their ideas, influence decisions, and move business forward through storytelling.</p> <p>Its mission is to make storytelling relevant and practical to everyone in business by teaching teams — regardless of their roles — how to create, simplify, and adapt a visual narrative for any audience — every day.</p> <p>TPC has partnered with Fortune 500 companies — including top CPG brands Colgate-Palmolive, Kraft Heinz, and Nestlé — to transform teams into strategic and influential visual communicators.</p> <p>The Presentation Company is proud to be a certified women-owned business with 75% of its workforce comprised of women.</p> |
| Industry | Corporate Education |
| Website | www.presentation-company.com |



Budget and Timeframe

| Budget and Timeframe | |
|---|---|
| Overall budget | No budget allocated |
| Number of (HR, Learning, Talent) employees involved with the implementation? | 8 Mark G. Evans Karen Goya Priya Goyal Ridhima Juneja Daniela Delgadillo Andrea Lujan Gonzalez Julie Dolezilek Joseph D'Amico |
| Number of Operations or Subject Matter Expert employees involved with the implementation? | Andre Martins (Colgate Palmolive) Lee Lazarus (The Presentation Company) Katie Matthews (The Presentation Company) Kevin Campbell (The Presentation Company) Daren Lewis (The Presentation Company) |
| Number of contractors involved with implementation | 1 The Presentation Company |
| Timeframe to implement | 6 months |
| Start date of the program | January 2022 |

Business Conditions and Business Needs

Everyone loves a good story. But the reality is, many people struggle to apply storytelling to everyday business communications. Colgate-Palmolive was no exception. Colgate People in commercial functions were struggling to tell their story clearly to Colgate's most important retail customers and internally to their key stakeholders and division leaders.

The business landscape was also changing. COVID placed new realities on everyone, specifically less time with customers. The coveted annual meeting with retailers (i.e., the one shot to sell Colgate's ideas) became a 60-90 minute virtual call. Internally, key stakeholders were trying to keep business moving but online meetings exposed new weaknesses. Keeping people's attention 'virtually' now required a new level of



choreography, presence, and storytelling which most people did not have. Meetings were painful, lacked clarity, and often stalled business decisions.

The tipping point was first felt in North America, one of Colgate's biggest growth divisions. The self-serving, data-rich product pitches of yesteryear to retailers were no longer cutting it.

The feedback was blunt and honest to Colgate's brightest and smartest people. Retailers did not want to see 200-slide plus decks, inconsistent messaging, data dumping, and most importantly, presentations that focused only on Colgate's care-about's, not the retailers.

The world had changed, and Colgate-Palmolive needed to change, too.

Increased competition came from smaller brands that overshadowed Colgate-Palmolive with more creative storytelling capabilities. They were nimble, had clear ideas, the perfect balance of insights (from their data), and impactful visuals that humanized their narrative. Simply put, they could tell their story better than Colgate. The large retailers took notice.

Thankfully, senior leadership also took notice — specifically the Customer Development Organization (CDO) and Marketing Team executives who leaned in quickly. One executive response: "We are not where we need to be as a Consumer Packaged Goods (CPG) company." To stay competitive and continue to win business, Colgate People needed to put a stop to the inconsistent, disjointed communications that were showing up both with the customer and within the culture.

The company needed to shift to a category growth mindset, one that placed the customer and the category at the center of the conversation, not Colgate-Palmolive.

Colgate needed the skills, capabilities, and confidence to bring ideas together in a clear, compelling way that centered around a narrative and data strategy. One where everyone could quickly identify "what do you want me to know and do with this information?"

Closing this capability gap was set into motion and addressed as part of Colgate-Palmolive's Transformation 2025 initiative. Backed by senior leadership, it would not only address this skill gap, but the larger topic of how to rethink the way Colgate-Palmolive communicates with data.



Overview

The mission was clear. Colgate needed to upskill (and in some cases reskill) the commercial functions on how to influence and drive business forward with any form of communication, from emails and one-pagers to presentations. They sought to do this while also successfully transforming facts and figures into clear and actionable data insights. The goal became to create opportunities that would advance the conversation, not distract from the call-to-action or challenge one's confidence.

To build these capabilities, Colgate-Palmolive selected an external recognized industry leader and vendor partner, The Presentation Company.

The Presentation Company (TPC) is recognized as the "go to" company for capability building around storytelling and data visualization and even wrote a best-selling book, *Everyday Business Storytelling*. TPC helps the world's top brands bring clarity and meaning to their ideas and stops the spread of Frankendecks: cobbled together ideas and data that lack a clear, cohesive narrative and visual strategy.

TPC would also support Colgate's commercial vision of Diversity, Equity & Inclusion. Being that it is a women-owned business with 75% of its workforce comprised of women was important to Colgate-Palmolive as the company looked to build more confident female leaders in the world of STEM and specifically Data & Analytics.

Colgate is currently in its second year partnering with The Presentation Company deploying their global training program, and so far, the data speaks for itself!

Adoption throughout the enterprise was key, so the internal team overseeing the project connected their learning objectives to Colgate's organizational Transformation 2025 efforts and F.E.E.D. principles (Focused, Empowered, Experimental and Digital), the new agile way of operating.

As one leader shared, "If we can't communicate well with clients, we can't move quickly." With data and analytics being front and center of the company's capability building needs, TPC's courses became an integral part of the company's overall Data Literacy & Analytics Academy.

Executive Sponsorship was achieved, and the initiative was backed by the:

- Chairman, President & CEO
- Group President of Growth and Strategy
- Group President of Europe & Developing Markets
- Chief Human Resources Officer
- Chief Analytics & Insights Officer



- WW Director of Global CD Strategy & Capabilities
- Chief Learning Officer

The learning program addressed the following skills and competencies:

- Build audience-centered narratives to ensure stakeholder needs are top of mind (Why, What, How)
- Ground every conversation in a BIG Idea to help the audience understand the one thing they should know or do
- Bring clarity and meaning to complex ideas and data
- Cleverly use visuals to influence decision-making and buy-in
- Flex to any audience or scenario to be situationally fluent and remain confident

This learning program needed to be relevant and practical to everyone, no matter their role or function. Colgate had two objectives in this area:

- It wanted to make sure everyone felt seen and heard and debunk workplace stereotypes of “the engineer” or “finance person” who can’t communicate
- It wanted anyone, not just senior leaders, to be able to show up and present at their most important meetings

Colgate needed a learning program that was global, repeatable, scalable, and immediately applicable on the job (real work was expected to be brought to each training for coaching and makeovers).

There was one final “elephant in the room” topic to be addressed: Colgate culture

Historically, the culture of the company led people to be fearful of rejecting ideas from others in fear of offending. However, the results of these actions were not meeting customer needs. When individuals find themselves receiving advice from a variety of internal audiences (their boss, marketing, upper management) and are requested to “just add in a slide, or data point, or use this image” suddenly the narrative slips and it leads to what we call “Frankendecks”. Colgate People needed a common language and framework, grounded in a story first, visuals second mindset.

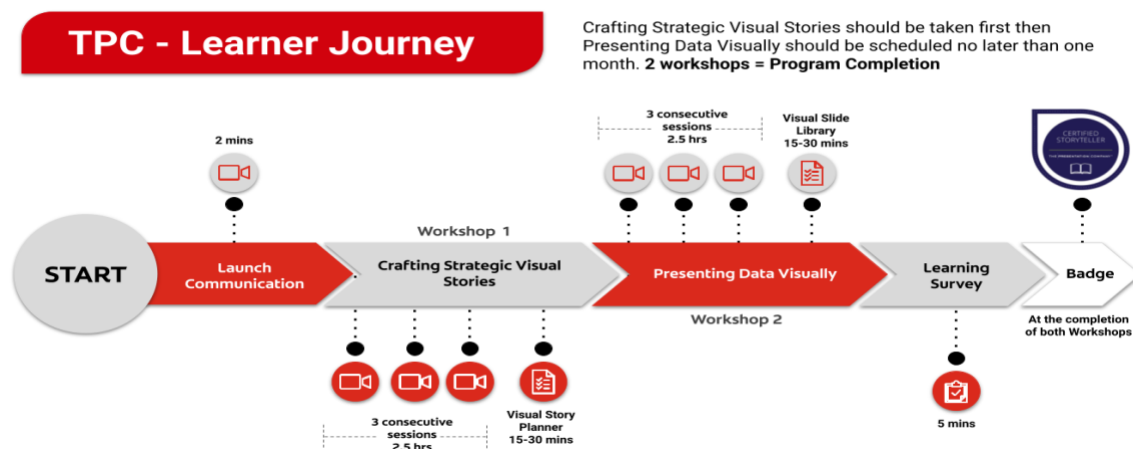
To address the criteria, the team identified the company’s skill-gap in the areas of business storytelling and data visualization.



Design of the Program

The learning experience consisted of a two-part highly experiential learning journey that was grounded in theory and practicality. Skills, tools, and coaching would build upon each other so learners could be exposed to concepts, application, and practice along the journey.

The Presentation Company's ongoing interviews with teams ensured the learning was relevant to the unique needs of each division, region and business unit (i.e., Marketing or Customer Development). This included exploring the specific business environment, local cultures of the teams, and pain points to assure facilitators could contextualize delivery.



Below are the details of each workshop:

Crafting Strategic Visual Stories is a story strategy workshop that teaches learners how to transform presentations, high-stakes emails, 1-pagers, and proposals into audience-centric business stories.

This workshop introduced a common language and a simple, repeatable framework for developing business stories quickly and efficiently. Cross-functional teams received collaborative tools and practical resources that upleveled the way they communicate, captured their audience's attention, and ensured ideas are clear and actionable.

Tools provided to enable behavior change:

- Conceptual Guide
- Everyday Business Storytelling companion book
- Visual Story Planner™, a framework tool for audience-focused story planning
- StoryStarters™ Story Checklist



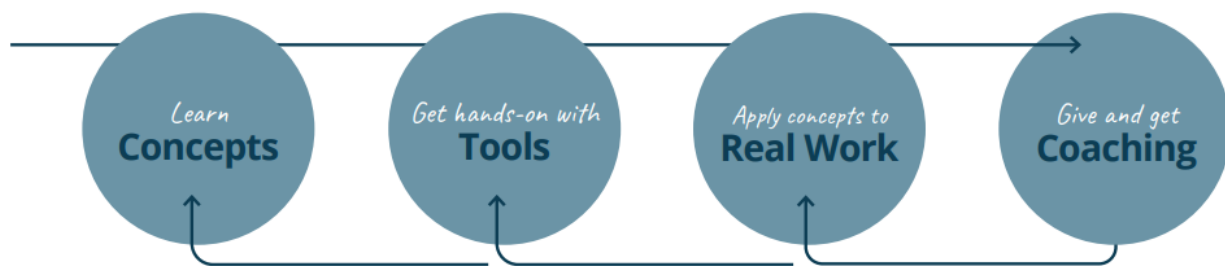
- Peer Coaching & Manager Guidelines

Presenting Data Visually was next in the learning journey, to be taken one month after Crafting Strategic Visual Stories. This data visualization training helped learners cut through the “noise,” tame their impulse to data dump, and turn facts and figures into easy-to-scan data visualizations. Teams learned how to create compelling data stories using easy-to-scan charts, tables, and graphs. Using the latest data storytelling strategies and classic design principles, they learned best practices for transforming data insights into clear recommendations that elevate conversations and drive informed business decisions.

Tools provided to enable behavior change:

- Conceptual Guide
- Practical Guide
- Visual Slide Library, a library of about 100 visual & data layouts for visual storytelling, customized in Colgate-Palmolive’s brands
- QAT (Quick Access Toolbar)
- Peer Coaching & Manager Guidelines

Beyond the day of training, Colgate-Palmolive and The Presentation Company wanted a model for meaningful behavior change. The following elements were built into the learning program to ensure this.



Learn concepts: The program provided access to a simple and easy-to-use storytelling framework and data visualization strategy to craft business stories quickly and efficiently.

Get hands-on with tools: A robust suite of interactive and collaborative tools, each embedded with coaching and pro-tips, traveled along the learning journey to jumpstart development and reinforce learnings.



Apply concepts to real work: The team knew that real-time critique made the most long-lasting impact, so they had participants bring real work – presentations, emails, one-pagers... anything that was top of mind for them – to ‘makeover’ in the training.

Give and get coaching: The learning journey was filled with opportunities to collaborate, mentor, and build confidence through expert and peer-to-peer coaching. The goal was to help build a culture of coaching internally and to elevate teams’ executive presence along the way.

Rewarding People: Colgate-Palmolive recognized its learners’ efforts and skills acquired through the courses and overall journey by awarding badges. The badge was concrete evidence of what they had accomplished and were now capable of doing. Badges were and continue to be shared internally in email signatures and externally on professional networking sites, like LinkedIn. The best part...even senior management posted badges!



Delivery of the Program

Colgate selected the vendor partner (a deliberately external, best-in-class learning solutions provider, as noted above), and partnered to craft a powerful, engaging, and highly applicable learning journey that was delivered in year one 100% virtually to nearly 800+ employees.

Each workshop included three consecutive virtual sessions (2.5 hours each) facilitated by The Presentation Company, followed by post-workshop activities.

The program launched with a pilot engagement made up of hand-selected, high-profile participants and engaged executive sponsorship behind it. From there, the program quickly expanded globally to all Customer Development and Marketing professionals.

Executive sponsorship was key for engagement and ongoing adoption of skills. This included participation in program kick-offs, pre-workshop interviews, communications to teams, and attending the workshops themselves.



The team's goal by the end of 2022 moved on to broadening attendance and bringing this beneficial learning journey to more Colgate-Palmolive people, both in-person and virtually.

Change Management Efforts

Like many companies, multiple priorities post-COVID and a massive reorg halfway through 2022 led to challenges in the early days. In addition, there was no centralized budget to tap into. Each functional team and division would invest in this offering and commit to it in a timely manner. Educating around this change would be key to Colgate-Palmolive's success and require a new level of planning and mindfulness.

The company's first goal was to educate global divisions by building momentum for this highly valuable program and move beyond just executive sponsorship. It needed to explain the Why, What, how of the learning program to everyone. The following efforts were implemented to increase awareness and gain interest and participation.

Communicate, communicate, communicate! Colgate-Palmolive built a communication strategy to develop and distribute communications that included the following to better market and promote the program:

- Meetings with Colgate Business Services and Business HR representatives to bring awareness about the program and its benefits, sharing up-to-date results, course overview, guidelines, and cost. In addition, the HR divisions would connect quarterly with the Business HR team to share what they were doing in the Learning Department and how much to allocate for learning delivery to plan appropriately.
- Video testimonials from past participants praising the program. This addressed everything from time well spent, to their skills being sharpened and broadened, to the immediate applicability to their job. Participants also shared and appreciated the company's investment in them, and highly recommended participation to peers.
- Videos from people managers showing their support of the program. They personally saw the immediate use of knowledge and skills learned and improvement in on-the-job performance of their staff as a result of their participation in the program.
- Videos from senior leaders thanking those who developed, coordinated, and attended the program, and offering their support of and encouragement of additional participation.
- Quotes received from learners from their free-form survey comments.



- Team planning sessions in alignment with the company's calendar to ensure training did not interfere with holidays of each region, nor big launch dates or high priority projects.
- Monthly data report-outs on scheduled and completed sessions by division, and participant survey results.
- Provide monthly updates to VP to People Global Development on utilization based on division, region and function.
- From a marketing perspective, Colgate-Palmolive made the courses a functional requirement for those in scope (commercial and marketing teams).
- Finally, Colgate-Palmolive opened the program to a broader set of functions (e.g., HR, Supply Chain, R&D, Legal, Finance, etc.) as part of the Data and Analytics Academy Continuous Learning recommendations. The team will further prioritize the groups that this will be promoted to, especially those who will be champions and promoters of this program. This is important to create a "pull" for enrollment by having influencers highlighting the merits (i.e., upskilling) of the overall learning experience.

Measurable Benefits

Those who participated in the learning journey applauded, valued, and benefited from their learning experience immediately, as exemplified in the program's exceedingly high survey scores (30 points above department average) and frequent learner posts on LinkedIn praising the solution. Colgate-Palmolive also started to see immediate behavior change on the job as described below.

Colgate-Palmolive's #1 goal was to have the company shift to a category growth mindset, one that placed the customer and the category at the center of the conversation, not Colgate-Palmolive.

Based on this primary objective, success has been seen both with retail customers as well as with internal cross-functional teams.

External Communication Improvement:

The storytelling and data visualization learning program has transformed the way Colgate-Palmolive conducts business and shows up in front of retailers:

- "What we've given them with these two courses, is a gift. To be able to pivot and tell their story to the customers."
— Learning Leader, Colgate-Palmolive
- According to one commercial executive, after 13 years, Colgate-Palmolive has been invited 'back to the table' with top retailers to be a part of the conversation



and thought leadership opportunities. “We are being seen as a strategic partner, not a supplier.”

- Meetings that were once yearly and transactional are now resulting in strategic, robust partnership conversations that involve Colgate-Palmolive in new ways throughout the year.
- Being considered a category leader that consumers can trust has been one of the best ROIs Colgate-Palmolive could ask for. Specifically, one of the largest retailers in the US is partnering with Colgate-Palmolive to test new programs in the entire category. This is a huge win with tremendous revenue upside that in previous years had involved only the competition.
- Buyers/retailers are allocating more time to Colgate-Palmolive. In some cases, there has been a shift in buyer behavior and engagement. For instance, a 4-hour meetings transformed into 8-hour brainstorm sessions with key executives. To get this level of exposure and time is no small feat, when just a year ago Colgate-Palmolive was lucky to get forty five minutes to a one-hour virtual meeting.
- Category managers are telling a unified story to their retailers. They continue to build upon the narrative and iterate but don’t change their ‘big idea’ each time. This provides clarity, consistency, and direction for their audiences and moves business forward efficiently.
- Colgate-Palmolive’s data insights to make critical business decisions are being applauded. The data tells a story with a clear point-of-view, allowing them to talk not just about Colgate-Palmolive products, but the category as a whole, with non-biased insights. Retailers are taking note of this behavior change and are now engaging in new higher-level category discussions and applauding Colgate for its transparency.
- Graduates from the learning journey are showing up differently, both offline and face-to-face. They are using the storytelling framework for more than just presentations. Emails are generating interest and securing meetings with the largest retailers by using active headlines and telling a concise story. Executive pre-reads are conversational narratives that help set the scene before they even enter the room. Finally, the team has taken their new storytelling skills and reformatted the physical spaces/rooms they use to present with retailers, using visuals to humanize the narrative in a whole new way.
- Presentations are more concise throughout the CDO organization specifically (the first target audience for the rollout), in some cases shifting from hundreds of slides down to only a handful!



Internal Communication Improvement:

Beyond this top goal of putting the customer and category front and center, Colgate-Palmolive has seen a massive shift in the way internal conversations are taking place:

- Selling ideas internally or having challenging conversations over funding/budgets are easier using the storytelling framework and data visualization techniques.
- Marketing & Business Insights and other cross-functional groups that work with CDO are now leaning in to take these learnings as they recognize they are part of the narrative that needs to be right the first time.
- Decisions are getting made faster due to the clarity of the conversations.
- Individuals who were once struggling to lead (and not invited to key meetings) are showing up more confident and are able to fill senior leaders' shoes. They are being seen and heard in new ways, which has dramatically improved company-wide productivity and efficiency and led to an increase in career mobility.
- These courses are now part of the Data and Analytics Academy sponsored by the Chief Analytics & Insights Officer.
- The culture is also starting to shift. The principles of storytelling are providing objective, non-emotional conversations around the elements that need to be highlighted in any given communication medium, without offending Colgate people.

Participation Data:

Competency and skill development is growing across the global organization

Sessions conducted per year

| | 2021 | 2022 | 2023 | Total |
|------------------------------------|------|------|------|-------|
| Crafting Strategic Visual Stories™ | 1 | 31 | 2 | 34 |
| Presenting Data Visually™ | 1 | 25 | 1 | 27 |

Participants attended per year

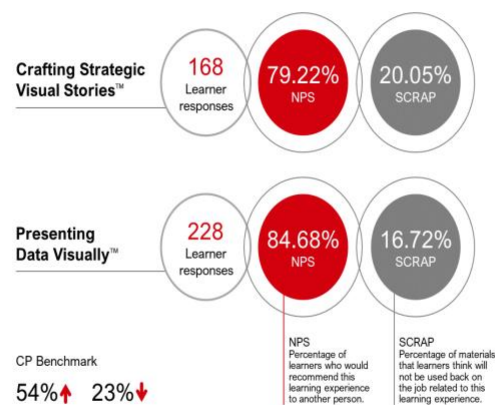
| | 2021 | 2022 | 2023 | Total |
|------------------------------------|------|------|------|-------|
| Crafting Strategic Visual Stories™ | 18 | 514 | 26 | 558 |
| Presenting Data Visually™ | 18 | 365 | 17 | 400 |



Learner NPS & SCRAP data:

- Over the last year, the Crafting Strategic Visual Stories and Presenting Data Visually have been the rightest ranking courses at Colgate-Palmolive, both internally & externally
- Consistently have the highest NPS and lowest SCRAP

The results exceeded Colgate-Palmolive's benchmarks



Overall

Since delivering this learning program, teams that have completed the training have successfully transformed into strategic communicators with the ability to present ideas and data with clarity, influence decisions, and drive business forward. The partnership with The Presentation Company has proven to be a critical piece of Colgate's Transformation 2025 initiative.

The training program has led to these impactful organizational outcomes:

- Superior performance and growth in every commercial role
- Accelerated decision-making, time-to-revenue, and innovation
- Improved alignment and agility among teams
- Trusted advisors' status with key business partners, providing the 'right' insights and objectivity.
- Career advancement opportunities due to new influencing skills



Storytelling & Data Visualization continue to strike a chord with the organization and more functions outside commercial are taking notice and asking for the same capabilities.

To strengthen this collaboration with The Presentation Company, Colgate-Palmolive is looking to accomplish the following:

- Build a culture of storytelling and story coaches at Colgate-Palmolive.
- Create a common language and framework, using a story first, visuals second mindset.
- Strengthen data literacy and the ability to provide audience-relevant insights.

Ongoing Feedback Collection:

The Colgate-Palmolive Learning Organization continues to collect learner testimonials on how they have used this learning and been successful for ongoing internal marketing purposes and qualitative measurement of success.

Participants have to show techniques for communicating quantitative data more effectively to various audiences, highlight key data and apply proven visualization strategies that radically elevate their insights. Improvement and success using these skills is measured in the presentations to customers or during formal budget review presentations.

The team will also be measuring the use of the data visualization tools, including the Visual Slide Library that learners leverage to start transforming ‘after’ examples of their work.

Another key factor for ongoing adoption is the number of participants by function to build an overall culture of storytelling & data visualization. The team is now focusing on upskilling throughout the remainder of the marketing group, CDO and will spread to the Insights Team, and GTeD (Global Technology and Development).

Ongoing evaluation of participants’ appreciation and confidence in their learning journey experience will be executed by sending a survey to check the level of skills, capability, and application before and after the program. Managers will also be surveyed (60 days post-workshop) regarding their team’s improved performance during budget review or customer presentations.

Deepening Colgate-Palmolive’s Partnership with The Presentation Company:

Given the success of these two courses, the team continues to broaden the potential audience and expand the learning journey. In 2023, Colgate will partner with The Presentation Company and offer a potential third course in the learning journey,



Influencing with Visuals, which is focused on how to bring a story to life visually. The conversation behind this course is how to make a potential bridge for other functions that are struggling in this area.





Brandon Hall Group

**EXCELLENCE
AWARDS 2023**

About Brandon Hall Group™

With more than 10,000 clients globally and 30 years of delivering world-class research and advisory services, Brandon Hall Group™ is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

Professional Certifications

Self-paced certification programs. Virtual group sessions for companies. In-person conferences and summits.

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Three annual programs recognize the best organizations that have successfully deployed programs to achieve measurable results.

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Advisory Offerings

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**SOME WAYS
WE CAN HELP**



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recognizes world-class HCM programs that transform their organization and achieve breakthrough results. This designation is the next step beyond the HCM Excellence Awards, which focus on a single program, and looks at the department as a whole.



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