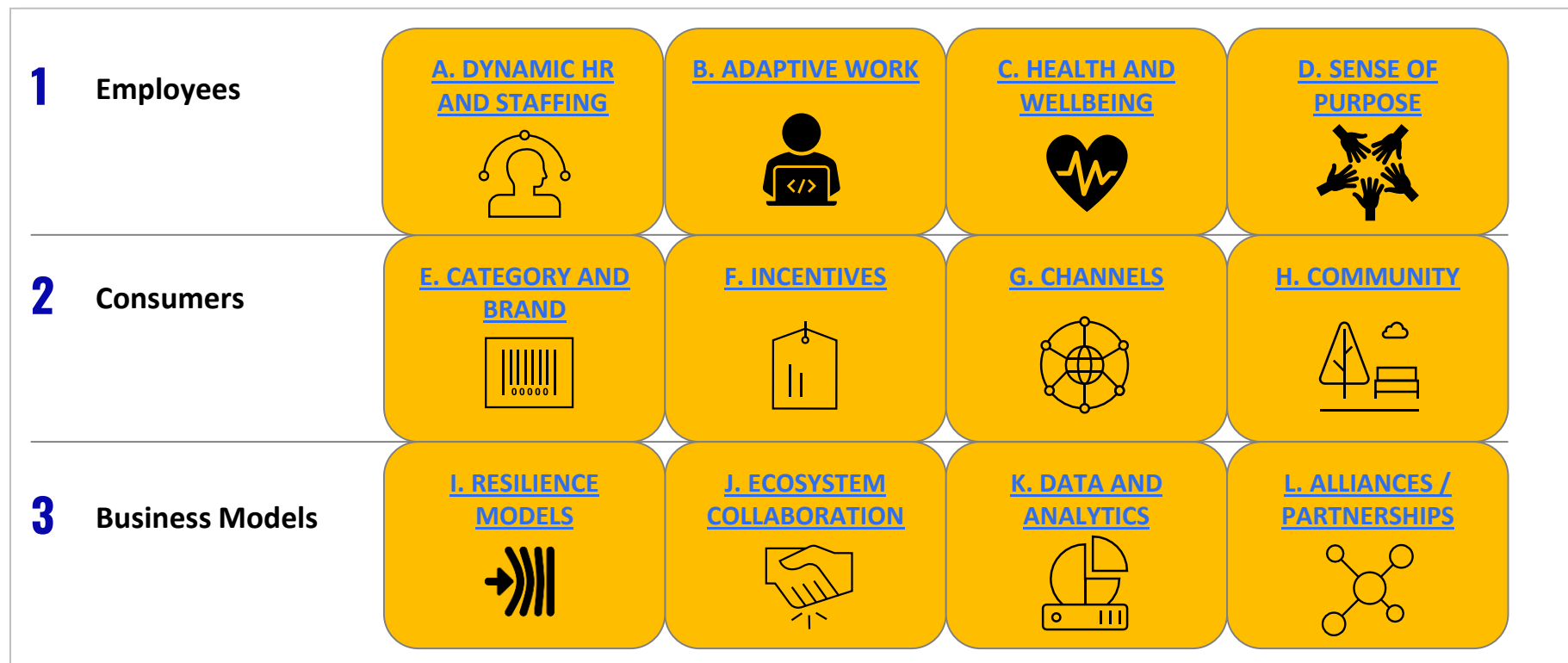


# LEARNINGS & NEW NORMAL SUMMARIES

Business as a Force for Good in Times of a Crisis – COVID-19

6/9/2020

# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



*Click into each module name and it will guide you to the summary pages*

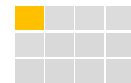
# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



|                          |                                       |                                       |                                    |  |
|--------------------------|---------------------------------------|---------------------------------------|------------------------------------|--|
| <b>1</b> Employees       | <b>A. DYNAMIC HR AND STAFFING</b><br> | <b>B. ADAPTIVE WORK</b><br>           | <b>C. HEALTH AND WELLBEING</b><br> | <b>D. SENSE OF PURPOSE</b><br>         |
| <b>2</b> Consumers       | <b>E. CATEGORY AND BRAND</b><br>      | <b>F. INCENTIVES</b><br>              | <b>G. CHANNELS</b><br>             | <b>H. COMMUNITY</b><br>                |
| <b>3</b> Business Models | <b>I. RESILIENCE MODELS</b><br>       | <b>J. ECOSYSTEM COLLABORATION</b><br> | <b>K. DATA AND ANALYTICS</b><br>   | <b>L. ALLIANCES / PARTNERSHIPS</b><br> |

*Looking for similar sections?*

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- Search “**Learnings**” in the GLM for all module learnings summaries
- Search “**New Normal**” in the GLM for all module new normal summaries



# LEARNINGS SUMMARY OVERVIEW

## A. DYNAMIC HR & STAFFING



### Maintaining Business Continuity (Short-term)

- Lack of health coverage and benefits
- Reduced staff availability / absenteeism
- Impacted employee jobs driving immediate cost fluctuations (e.g., additional shifts, work share programs, furloughs, layoffs)



- Continue to communicate with, listen to, support, and reward employees that are working, and check in with those who are not working
- Realign employees to areas of increased demand as quickly as possible
- Slow ease of cost containment with priority to critical skills and functions
- Provide clear, factual, and sustainable messaging toward the employees about company position
- Look for opportunities to partner with other companies to temporarily lend employees based on demand shifts
- Develop short-term support mechanisms for employees and their families

### Managing the Crisis (Medium-term)

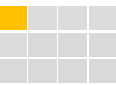
- Need for additional staff and frontline workers (e.g., drivers, distribution centres) to meet increased demand
- Short-term support needed for employees and their families (i.e., telehealth, online courses, online fitness)
- Continued focus on cost containment



- Empower employees to ensure decisions are taken within general guidelines from management
- Consider rewards for those working during the crisis beyond pay – examples include well-being support (assistance for essential expenses, childcare, vacation days) and flexible schedules (compressed work week), alternative work schedules, or results-based schedules
- Use manager or HR capacity to revise personnel marketing concepts and rethink company talent position
- If applicable, collaborate and share employees effectively within your company (and potentially with other companies)
- Reinforce operations with additional staff, better staff management, and staff re-alignment
- Ensuring employee learning and development goals are heard and met

## Challenges/ trends

## Key learnings

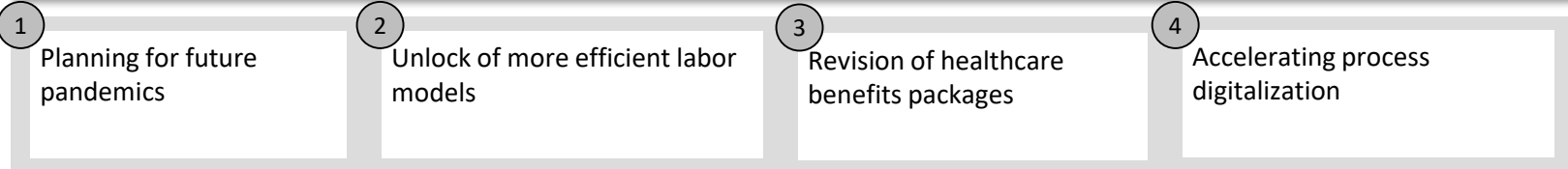


# NEW NORMAL HIGHLIGHTED INSIGHTS



## Adapting to the New Normal (Long-term)

### Emerging Issues



### Strategic implications

- |  |  |   |  |
|--|--|---|--|
| <ul style="list-style-type: none"> <li>A. Develop a crisis management plan and team to weather future issues</li> <li>B. Structure bottom-up review with staff for main learnings from crisis in terms of efficiency, teamwork, and relationships among departments, and apply them to the “new normal” (e.g., deleted / on-hold processes, direct contact between departments, different sharing of responsibility, faster response time to changes)</li> </ul> | <ul style="list-style-type: none"> <li>A. Labor models shown to be efficient may become permanently adopted</li> <li>B. Enhance labor models through COVID-19 learnings, including staff required, flexibility, staffing roles, new contracts, and automation</li> <li>C. Reinvent jobs, operational and talent programs, and processes to drive operational effectiveness</li> <li>D. Encourage ongoing dynamic management - rapid reaction readiness needed to manage potential new waves</li> <li>E. Transform recruitment process from position-centric to talent-centric</li> </ul> | <ul style="list-style-type: none"> <li>A. Address long-term planning of increased healthcare benefits and sick leave for workers</li> <li>B. Revise policies and expectations for staying home when sick</li> <li>C. Be thoughtful and proactive, and remember not all financials are created equal</li> <li>D. Get creative when it comes to carrier credits</li> <li>E. Innovate and consider disruptive strategies</li> <li>F. Assess mission and resourcing of occupational health functions</li> </ul> | <ul style="list-style-type: none"> <li>A. Long-term adoption of digitalization &amp; automation has been accelerated</li> <li>B. With stakeholders, retroactively examine benefits of (or lack thereof) process digitalization in COVID-19 response</li> <li>C. Retailers &amp; manufacturers will need to evaluate processes and areas of opportunity for process digitalization and work with stakeholders to adopt and implement</li> <li>D. Impacts of 100% digital work (meetings, procedures, and processes) on mental health / fatigue</li> </ul> |
|--|--|---|--|



# HIGHLIGHTED CASE STUDIES

Case Study (CS) Module Legend: **E** Employees **D** Digital and online

**S** In store **C** In communities

| Logo | Name/Region                        | CS Module | Overview  | Contact  |
|------|------------------------------------|-----------|---|--|
|      | <b>Jerónimo Martins</b><br>        |           | At risk employees sent home with 100% payment, rotating shift regime, medical department in support of employees  | <b>Carlos Santos,</b><br>Corporate Quality Director  |
|      | <b>General Mills</b><br>           |           | Opportunity for corporate employees to work at manufacturing plants; enhanced benefits for front line employees   | <b>Courtney Bidney,</b><br>Director, Global Scientific and Regulatory Affairs and Bell Institute of Health and Nutrition   |
|      | <b>HDE &amp; EHI Institute</b><br> |           | Staff placement platform allowing temporarily unemployed people to find work in food retail, logistics, and other sectors needing support                                 | <a href="#">German Retail Federation and EHI Retail Institute Link</a> or contact Sharon Bligh at The Consumer Goods Forum |
|      | <b>Sodexo</b><br>                  |           | Partnered with Amazon, Kroger, PepsiCo to help its employees find work and stay working, or support them if they are out of work; moves employees to hospitals & homecare | Contact Sharon Bligh at The Consumer Goods Forum   |
|      | <b>Aldi and McDonald's</b><br>     |           | McDonald's employees temporarily work for Aldi until reopening  | <a href="#">Altavia Watch Article Link</a> or contact Sharon Bligh at The Consumer Goods Forum                             |
|      | <b>Lala</b><br>                    |           | Installed emergency committee that meets daily virtually to analyze the situation and define the actions that the company should implement                                | <b>Alvaro Suarez,</b><br>Team Leader   |

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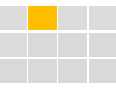
# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



|                          |                                       |                                       |                                    |  |
|--------------------------|---------------------------------------|---------------------------------------|------------------------------------|--|
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| <b>2</b> Consumers       | <b>E. CATEGORY AND BRAND</b><br>      | <b>F. INCENTIVES</b><br>              | <b>G. CHANNELS</b><br>             | <b>H. COMMUNITY</b><br>                |
| <b>3</b> Business Models | <b>I. RESILIENCE MODELS</b><br>       | <b>J. ECOSYSTEM COLLABORATION</b><br> | <b>K. DATA AND ANALYTICS</b><br>   | <b>L. ALLIANCES / PARTNERSHIPS</b><br> |

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- Search “**New Normal**” in the GLM for all module new normal summaries



# LEARNINGS SUMMARY OVERVIEW

## B. ADAPTIVE WORK



### Maintaining Business Continuity (Short-term)

### Managing the Crisis (Medium-term)

## Challenges/ trends

- HR steps up to “its crisis”
- Stay-at-home orders from local governments
- Work-from-home and remote working requirements
- Focus on cost / headcount management
- Government job retention schemes in many countries

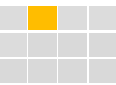
- Limited return to worksite, with continued impact to jobs for those not returning; prolonged childcare concerns
- Continued anxiety & fear of exposure to disease can make returning to work unpredictable and unsafe for some
- Share of jobs that can be performed at home during social distancing inputs in predicting economy performance

## Key learnings

- HR organises and leads the response to the crisis
- As fast as possible, reorganize employee tasks to focus on high-need areas, within safety guidelines
- Adjust workplace configurations to enforce safety as quickly as possible (remote or enforcing social distancing)
- Share best practices for both remote work and on-site work (e.g., providing frontline employees with PPE)
- Enforce limit on business travel, especially to areas most affected by the virus; employees stay home when sick
- Additional support for employee physical and mental wellbeing and prevent exposure as much as possible
- Rebase leadership and management interactions with staff (focus on purpose, less on task management)
- Review workforce size and shape in view of needs including furloughs, reduced hours, etc.

- Strategize flexible working models – consider the ‘how, when, where, what, and who’ dimensions of a job
- Implement any models that are win-win for employers and employees (cost / time saving, more productive, healthier)
- Increase employee engagement and communication
- Encourage employees to support various functions given adaptive mindset as the crisis evolves
- Invest in workforce development as much as possible, by flexing employees to areas of demand and training to deal with social distancing to avoid violence incidents
- Support designing protocols through employee lens (e.g., “Day in the Life” or “moments that matter”)
- Prepare for greater flexibility of schedules given childcare and anxiety concerns
- Encourage employees to stay home if sick or at high risk, but allow those who feel vulnerable or challenged at home to return



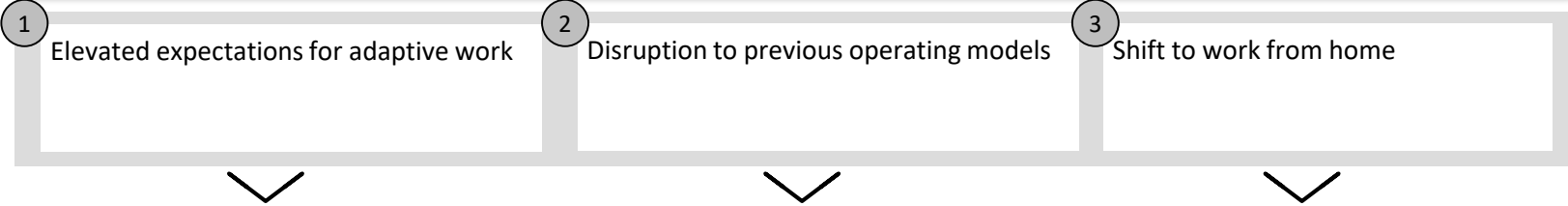


# NEW NORMAL HIGHLIGHTED INSIGHTS



## Adapting to the New Normal (Long-term)

### Emerging Issues



### Strategic implications











- |   |   |   |
|---|---|---|
| <ul style="list-style-type: none"> <li>A. Challenge current policies to include greater flexible working opportunities for mutually beneficial changes</li> <li>B. Define new workforce plans including flexibility to manage headcount</li> <li>C. Define the new employee experience / employee value proposition around future workforce segments</li> <li>D. Think about creative flexibility dimensions – varying shift work, job sharing, elastic workforce, cross-training, etc.</li> <li>E. Consider upstream and downstream impacts of making the job flexible, with legal impacts</li> <li>F. Ensure clear communication and formalization of new adaptive work policies so that employees understand impacts of job</li> <li>G. Create an experience that allows employees to live &amp; work “in flow”</li> </ul> | <ul style="list-style-type: none"> <li>A. Reorganize / reconfirm business as usual op model based on “New Normal” – temporary vs. permanent changes (e.g., process changes, roles, decision-rights)</li> <li>B. Rethink the organisation of people</li> <li>C. Define new leadership style &amp; develop capabilities (delegated and semi-autonomous teams, “unbossed” style)</li> <li>D. Identify talent sources and acquisition processes; transform HR</li> <li>E. Reinforce new ways of working to sustain productivity (e.g., refreshed performance enablement)</li> <li>F. Provide ongoing “connective tissue” between leadership and frontline (e.g., new feedback processes, sense of belonging, impact on management and leadership styles)</li> <li>G. Co-create new ways of working with frontline employee input</li> </ul> | <ul style="list-style-type: none"> <li>A. Need to evolve HR policies based on bottom-up feedback for WFH / office balance to incorporate flexible work policies in the long-run and their impact on performance and reward management</li> <li>B. Plan for more video conferencing moving forward and ensure best practices for flexible working are communicated across organization (focus groups, feedback loops)</li> <li>C. Equip employees with what is needed for remote or virtual responsibilities</li> <li>D. Highlight complementarities between jobs that can be done at home and those that cannot</li> <li>E. When crisis subsides, ensure support to offer a balanced transition back to work</li> </ul> |
|---|---|---|



# HIGHLIGHTED CASE STUDIES

Case Study (CS) Module Legend:

- (E) Employees
- (D) Digital and online
- (S) In store
- (C) In communities

| Name / Region   | Logo  |
|---|---|
| <p><b>MIGROS TICARET A.Ş.</b></p> <p>Migros Ticaret</p>                                      |    |
| <p><b>SPAR</b></p>   |    |
| <p><b>Danone</b></p>   |   |
| <p><b>Ahold Delhaize</b></p>   |    |
| <p><b>Carrefour</b></p>    |    |
| CS Module   | Overview  |
| <p>(E) (D) (S) (C)</p> <p>Rotating work in and out of office, one day closed office to be disinfected in detail; online trainings and videos</p>                              | <p>(E) (D) (S) (C)</p> <p>Staff rotation, online training on crisis management</p>  |
| <p>(E) (D) (S) (C)</p> <p>Regular townhalls with leaders, manager's tips to lead a team from home, in-depth employee campaigns on empowerment and support</p>                 | <p>(E) (D) (S) (C)</p> <p>Called on every employee to work on where need was high, HQ working in stores or distribution centers, associates are organizing webinars &amp; classes</p> |
| <p>(E) (D) (S) (C)</p> <p>Created training videos to communicate employee responsibilities and expectations during the epidemic; offered prevention and coping strategies</p> | <p>(E) (D) (S) (C)</p> <p>Created training videos to communicate employee responsibilities and expectations during the epidemic; offered prevention and coping strategies</p>         |
| Contact   | Contact   |
| <p><b>Ahu Baskut Alyanak</b>, Corporate Comm. Director<br/><b>Demir Aytac</b>, Business Alliance Executive</p>  | <p><a href="#">SPAR COVID-19 Link</a> or contact Sharon Bligh at The Consumer Goods Forum</p>   |
| <p><b>Isabelle Grosmaître</b>, Alimentation Initiative Catalyst</p>   | <p><b>Imke Van Gasselt</b>, Director of Health</p>  |
| <p><b>Jing Ren</b>, National Quality and Food Safety Director</p>   | <p><b>Jing Ren</b>, National Quality and Food Safety Director</p>   |

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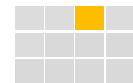
# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



|                          |                                       |                                       |                                    |  |
|--------------------------|---------------------------------------|---------------------------------------|------------------------------------|--|
| <b>1</b> Employees       | <b>A. DYNAMIC HR AND STAFFING</b><br> | <b>B. ADAPTIVE WORK</b><br>           | <b>C. HEALTH AND WELLBEING</b><br> | <b>D. SENSE OF PURPOSE</b><br>         |
| <b>2</b> Consumers       | <b>E. CATEGORY AND BRAND</b><br>      | <b>F. INCENTIVES</b><br>              | <b>G. CHANNELS</b><br>             | <b>H. COMMUNITY</b><br>                |
| <b>3</b> Business Models | <b>I. RESILIENCE MODELS</b><br>       | <b>J. ECOSYSTEM COLLABORATION</b><br> | <b>K. DATA AND ANALYTICS</b><br>   | <b>L. ALLIANCES / PARTNERSHIPS</b><br> |

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# LEARNINGS SUMMARY OVERVIEW

C. HEALTH AND  
WELLBEING



## Maintaining Business Continuity (Short-term)

## Managing the Crisis (Medium-term)

### Challenges/ trends

- Unavailability of protective equipment at first
- Impact of long hours, risk, and stress
- Employees' safety and motivation is top of mind
- Employees feeling sick or worried about contracting the virus

- Development of stress-related diseases and prolonged anxiety due to length of crisis presence
- Increased demand for PPE on a daily basis
- Potential pushback from employees due to dissatisfaction around safety precautions and exposure to health hazards



### Key learnings

- Provide protective equipment especially for the essential frontline workers as quickly as possible given supply concerns
- Recognize increased health risks involved for on-site work, varying by job and level
- Prioritize cleaning supplies for retailer (i.e., employees, store environment) and manufacturer (i.e., trucks, plants, distribution centers) operations prior to consumer need
- Utilize alternatives to physical contact like curbside pickup, drive-thru services, and online ordering if possible
- Show appreciation to workers:
  - Provide hazard fees for every delivery made to consumers' doors and provide weekly bonuses
  - Increase hourly wages and expedite Q1 pay
  - Provide meals for frontline workers if possible

- Provide protective equipment (masks, gloves, sanitizer, plexiglass, disinfectant wipes) continuously
- Provide coronavirus testing and other solutions to soothe worker fears when available
- Encourage social distancing using tape markers or signage, or have a monitor at the door enforcing capacity or distance
- Implement new workplace configurations (e.g., "partial capacity," deep cleaning, A/B team) for safety
- Consider providing paid sick leave, family leave, health coverage, and caregiving support
- Have managers check in with employees as much as possible for a 1:1 meeting on health and wellbeing
- Ensure employees are able to maintain mental health while adapting to work-from-home using surveys and focus groups
- Offer telehealth (both physical and mental) and online courses (i.e., fitness) for employees and family members
- Assess fatigue impact of 100% digital work

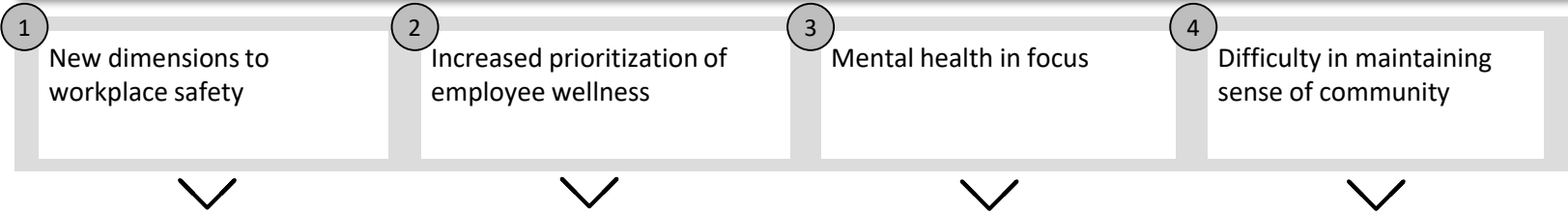


# NEW NORMAL HIGHLIGHTED INSIGHTS



## Adapting to the New Normal (Long-term)

### Emerging Issues



### Strategic implications

- |   |  |   |   |
|---|--|---|---|
| <ul style="list-style-type: none"> <li>A. Enforce greater standards for hygiene and sanitization (i.e., at stores, trucks, plants, distribution centres), and ensure availability of PPE</li> <li>B. Communicate ongoing sanitation improvement and address any high risk concerns for health and wellbeing</li> <li>C. Create a safe work environment using temperature screening, questionnaires, and antibody / viral testing</li> <li>D. If applicable, rethink food display and maintenance standards</li> </ul> | <ul style="list-style-type: none"> <li>A. Emphasize employee wellness by providing explicit opportunities (e.g., stay home when sick, flexible time off), increasing communication (i.e., sick leave will not be punished), and tracking metrics</li> <li>B. Increase health benefits and upgrade existing wellbeing programs</li> <li>C. Leverage digital workplace wellbeing apps to help individuals focus on social aspects with other health goals (Fitbit challenges, sharing recipes, daily walk, etc.) to help employees feel fulfilled and energized</li> </ul> | <ul style="list-style-type: none"> <li>A. Train managers to check-in with employees, recognize mental health needs, and take appropriate actions</li> <li>B. Encourage employees to allow time for things that make them happy</li> <li>C. Give back some sense of control by implementing less overbearing management style and reminding people of the benefits to structuring their day</li> <li>D. Set up psychosocial risk prevention programs through trainings, virtual therapy, and increased tele-health options (incl. for family members)</li> </ul> | <ul style="list-style-type: none"> <li>A. Sustain a sense of community &amp; emotional connection among employees by celebrating good news, sharing H&amp;W tips, and recreating team rituals by leveraging technology &amp; ensuring the right balance of office presence</li> <li>B. Use focus groups to listen to employees, connect co-workers, and take nimble actions</li> <li>C. Offer connections to local resources (food banks, public transp., child care, housing, etc.)</li> </ul> |
|---|--|---|---|



# HIGHLIGHTED CASE STUDIES (1 OF 2)

Case Study (CS) Module Legend: (E) Employees (D) Digital and online

(S) In store (C) In communities






















| Name / Region    | Logo | CS Module | Overview | Contact  |
|------------------|------|-----------|----------|--|
| Ocado            |      |           |          | <a href="#">The Guardian Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum      |
| Tilda            |      |           |          | <a href="#">COVID Innovations Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
| Tyson            |      |           |          | <a href="#">Consumer Goods Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum    |
| Amazon           |      |           |          | <a href="#">ESM Magazine Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum      |
| Grupo Bimbo-GB   |      | LATAM &   |          | Rocio Flores, Global GB Wellness Manager   |
| PepsiCo          |      |           |          | John C. Jove, VP International Sales   |
| Procter & Gamble |      |           |          | Dawn Elvin, VP Global Pharmacy & Sales Personal Healthcare International                             |

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# HIGHLIGHTED CASE STUDIES (2 OF 2)

Case Study (CS) Module Legend:

- E Employees
- D Digital and online
- S In store
- C In communities

| Logo  | Name / Region  | CS Module   | Overview   | Contact  |
|---|--|---|--|--|
|    | <b>Bimbo</b><br>            |    | <p>(E) (D) (S) (C)</p> <p>Customized COVID-19 task observations checklist in an app to reinforce safe behaviors and coach on unsafe behaviors</p>  | <b>Leslee A. Will</b> ,<br>VP Labout and Associate Relations   |
|    | <b>CPM</b><br>              |    | <p>(E) (D) (S) (C)</p> <p>Each employee can consult a general practitioner free of charge on all mobile devices</p>  | Contact Sharon Bligh at The Consumer Goods Forum   |
|    | <b>Migros Ticaret</b><br>   |    | <p>(E) (D) (S) (C)</p> <p>Started Psychological and Medical Counseling service for family members of employees to connect with expert psychologists &amp; doctors</p>  | <b>Ahu Baskut Alyanak</b> ,<br>Corporate Communications Director<br><b>Demir Aytac</b> , Business Alliance Executive |
|   | <b>New Hope Liuhe</b><br> |   | <p>(E) (D) (S) (C)</p> <p>Established a prevention and control steering group that continuously released prevention and control guidelines</p>   | <b>Li Qin</b> ,<br>Director of Business Development  |
|  | <b>Nestle</b><br>         |  | <p>(E) (D) (S) (C)</p> <p>Provided cash loans or advances for those in financial distress; free meals &amp; transport for those in factories/distribution centers; flexibility to manage family responsibilities</p> | <b>Saliha Barlatey</b> ,<br>Head of Corporate Industry Affairs   |
|  | <b>LALA</b><br>           |  | <p>(E) (D) (S) (C)</p> <p>Created Measure of Prevention COVID-19 program to teach associates about virus and prevention</p>  | <b>Alvaro Suarez</b> ,<br>Team Leader  |
|  | <b>St Hubert</b><br>      |  | <p>(E) (D) (S) (C)</p> <p>Shared individual good practices within the company by implementing a neighbor directory that allows everyone to ask for help and share within the company</p>                             | Contact Sharon Bligh at The Consumer Goods Forum   |

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# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW

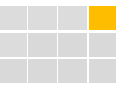


|                          |                                       |                                       |                                    |  |
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# LEARNINGS SUMMARY OVERVIEW



## Challenges/ trends

### Maintaining Business Continuity (Short-term)

- Public organizations are labelling certain jobs as essential or non-essential, indicating what roles are able to work in person or what businesses are able to operate
- Grocery store, distribution, and delivery workers are becoming more important to improving public health
- Many workers furloughed or uncertain about job security



## Key learnings

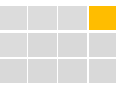
- Persistently demonstrate commitment to employees through words and actions to earn trust and loyalty
- Create new jobs with no resume or previous work experience required to help furloughed workers
  - “Social distancing ambassadors” responsible for monitoring shopper flow and enforcing limits
  - Warehouse operations, delivery network jobs, or other critical supply chain roles
- Shift current employee roles to be more relevant in response to the crisis
- Pause non-essential item delivery to prioritize distribution of essential items
- Consider rewarding employees who will be in continuous contact with other employees and / or the public

### Managing the Crisis (Medium-term)

- Food supply chains, from growers, to truck drivers, to retail grocery and delivery workers, are essential
- Retailers and manufacturers remaining operational begin to gather greater sense of purpose and increase desire for social impact in the community



- Listen to employee perspective and communicate employer perspective (demand shift implications and impacts of social distancing)
- Maintain productivity and motivate front line through feedback loops and offer ways to participate in decision making / crowd-sourcing suggestions
- Provide role flexibility for employees to ensure they understand their sense of purpose throughout the crisis
- Consistently remind employees of their role and importance to the company, whether working now or furloughed
- Invite employee participation to co-create an organizational purpose that can become a call-to-arms for the organization

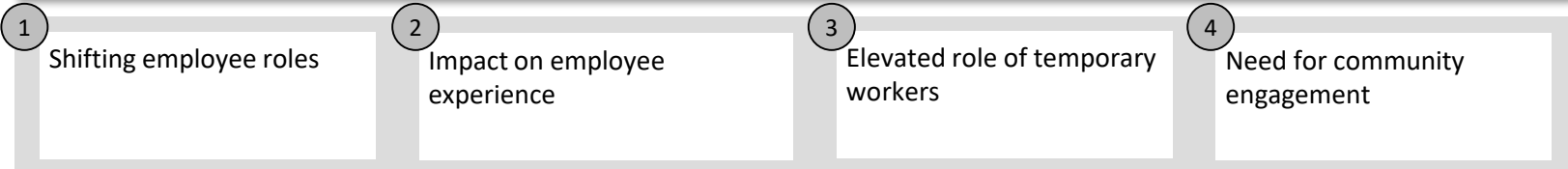


# NEW NORMAL HIGHLIGHTED INSIGHTS



## Adapting to the New Normal (Long-term)

### Emerging Issues



### Strategic implications

|   |   |  |  |
|---|---|--|--|
| <ul style="list-style-type: none"> <li>A. Reflect on and adjust roles to highlight their sense of purpose</li> <li>B. Continue to thank employees</li> <li>C. Implement purpose-driven awards and recognition programs</li> <li>D. Communicate clearly and consistently on <i>what</i> matters now (safety, business continuity), <i>why</i> it matters, and source of security and inspiration (e.g. human narrative)</li> <li>E. Avoid the split between those who can and cannot work from home</li> </ul> | <ul style="list-style-type: none"> <li>A. Engage, listen, and understand the impact to the employee experience throughout the return to work; even the “small things” could have a significant impact</li> <li>B. Allow for employees to connect and share experiences</li> <li>C. Build sense of belonging and collective to ensure that employees still feel that they are working for a company despite change in physical workplace</li> <li>D. Ensure those on furlough feel sense of belonging</li> </ul> | <ul style="list-style-type: none"> <li>A. Hire furloughed workers to work in warehousing, delivery, or other critical supply chain roles</li> <li>B. Shift roles to ensure essential operations are covered and communicate among workers to understand flexibility in needs</li> <li>C. Invest in strategic workforce planning and learning / development as means to increase internal mobility</li> </ul> | <ul style="list-style-type: none"> <li>A. Carve out essential roles that could be outsourced to volunteers</li> <li>B. Offer opportunities for employees to get involved in community through donating, volunteering, or supporting company foundation efforts</li> <li>C. Invite employees to participate in worthwhile initiatives to help them feel part of something bigger than themselves and give them an important role to play</li> </ul> |
|---|---|--|--|



# HIGHLIGHTED CASE STUDIES

Case Study (CS) Module Legend:

- (E) Employees
- (D) Digital and online
- (S) In store
- (C) In communities

| Logo | Name / Region                    | CS Module           | Overview  | Contact   |
|------|----------------------------------|---------------------|---|---|
|      | <b>Johnson &amp; Johnson</b><br> | <br>(E) (D) (S) (C) | Employees who are medically trained can take a global minimum paid leave of up to 14 weeks to serve community for COVID-19                | <b>Donna Padovano</b> , Sr. Director Global Retail Health Innovation                                |
|      | <b>Unilever</b><br>              | <br>(E) (D) (S) (C) | Courage is Beautiful campaign showing faces of healthcare workers marked by the protective gear they've been wearing                      | <b>Thea Koning</b> , Corporate Affairs, Foods and Refreshment                                       |
|      | <b>Coca-Cola</b><br>             | <br>(E) (D) (S) (C) | Encouraging employees to use two days of solidarity leave to participate in #JeVeuxAider platform   | <b>Wouter Vermeulen</b> , Senior Director, Public Policy  |
|      | <b>General Mills</b><br>         | <br>(E) (D) (S) (C) | Paid community service program for Minnesota based employees to redirect work hours to serving hunger relief non profits                  | <b>Claudine Galloway</b> , Corporate Communications   |
|      | <b>Fairprice Group</b><br>       | <br>(E) (D) (S) (C) | Care package for daily commuting employees affected by travel restrictions; email messages from CEO & videos to thank employees           | <b>Grace Chua</b> , Chief Strategy Officer and Deputy Head, Products Division                       |
|      | <b>Albertson's</b><br>           | <br>(E) (D) (S) (C) | Partnered with UFCW in a national drive to get grocery workers classified as emergency first responders during COVID-19                   | <a href="#">Supermarket News Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
|      | <b>Reckitt Benckiser</b><br>     | <br>(E) (D) (S) (C) | Launched robust internal program to keep teams aware of progress, motivated and connected to our senior leaders through virtual sofa chat | Contact Sharon Bligh at The Consumer Goods Forum  |

Please view numerous additional case studies, submitted by CGF members, in the Case Study Library

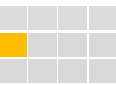
# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



|                          |                                       |                                       |                                    |  |
|--------------------------|---------------------------------------|---------------------------------------|------------------------------------|--|
| <b>1</b> Employees       | <b>A. DYNAMIC HR AND STAFFING</b><br> | <b>B. ADAPTIVE WORK</b><br>           | <b>C. HEALTH AND WELLBEING</b><br> | <b>D. SENSE OF PURPOSE</b><br>         |
| <b>2</b> Consumers       | <b>E. CATEGORY AND BRAND</b><br>      | <b>F. INCENTIVES</b><br>              | <b>G. CHANNELS</b><br>             | <b>H. COMMUNITY</b><br>                |
| <b>3</b> Business Models | <b>I. RESILIENCE MODELS</b><br>       | <b>J. ECOSYSTEM COLLABORATION</b><br> | <b>K. DATA AND ANALYTICS</b><br>   | <b>L. ALLIANCES / PARTNERSHIPS</b><br> |

*Looking for similar sections?*

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- Search “**Learnings**” in the GLM for all module learnings summaries
- Search “**New Normal**” in the GLM for all module new normal summaries



# LEARNINGS SUMMARY OVERVIEW



## Maintaining Business Continuity (Short-term)

## Managing the Crisis (Medium-term)

### Challenges/ trends

- Demand spikes of non-perishables and essential goods
- New consumer needs, mainly linked to the pandemic. Shoppers re-evaluate how they are consuming; many cooking at home or shopping online for the first time
- Out of stocks for the most in-demand products
- Strong shift to “whatever is available” before discounted / cheap products
- Aversion towards categories perceived as being “higher risk” (e.g., salad bar)

- Certain categories will spike (e.g., basics, stockpile essentials, frozen, rice / pasta), while other categories will decline (e.g., health and beauty, clothing)
- Difficult to forecast demand even after initial spike
- A new dynamic on basket building – larger baskets, less frequency
- Continued pressure from recession combined with downward price trend
- Competitors evolving their value strategy in light of COVID-19 experience

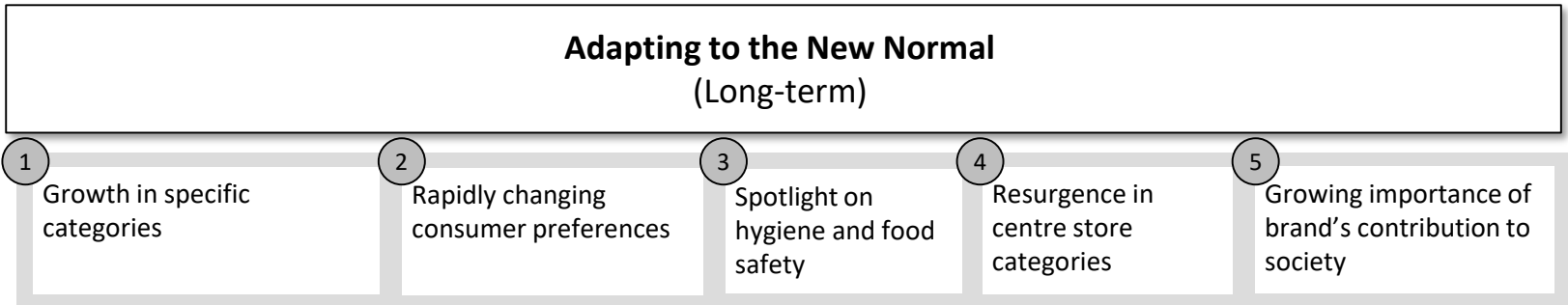
### Key learnings

- Refocus efforts on essential products by assessing supply chain and planning for shelf re-stocking; understand that during the crisis consumers will buy fewer premium products to save money
- Reduce efforts in non-food and non-essential items
- Plan ahead for substitute products and impose volume limits to reduce stockpiling behaviour; publish messaging to discourage panic buying and hoarding of essentials
- Notify consumers about out-of-stock and unavailable products

- Re-organize assortment for changing consumer needs, such as desire to purchase larger pack sizes and private label products, while maintaining profitability
- Implement and revise rationing and product limits over time as the crisis progresses and demand shifts
- Anticipate negative impact to come from “pull forward” of previously high-demand items during the crisis peaks
- Consider most efficient direct-to-consumer business models (e.g., offer more value by selling convenience items and take-and-bake meals)
- Recommend product bundles with available products for easier shopping



# NEW NORMAL HIGHLIGHTED INSIGHTS



## Strategic implications

- |  |   |   |   |   |
|--|---|---|---|---|
| <ul style="list-style-type: none"> <li>A. Increase products in higher demand for foreseeable future (i.e., hygiene SKUs; cooking at home; health-related categories)</li> <li>B. Adjust to anticipated changes in consumer choices (i.e., home cooking, local produce preferences, trading down &amp; expansion of private label, expansion of online)</li> <li>C. Decide which 6-8 “essential basket items” you will fight to keep. Essential items indicate whether you are the shopper's primary store or not – this is your “must win” strategy after market reset</li> <li>D. Manufacturers should focus innovation on new consumer trends (e.g., home cooking kits)</li> </ul> | <ul style="list-style-type: none"> <li>A. Increased demand in private label and essentials regardless of brand</li> <li>B. Drive value perception with private label to improve brand awareness</li> <li>C. Build production scale to reduce costs and improve margin</li> <li>D. Manage margin volume, and keep margin-generating premium lines that exhibit demand</li> <li>E. Find collaboration opportunities between manufacturers and retailers to shorten development process significantly</li> </ul> | <ul style="list-style-type: none"> <li>A. Retailers to invest in fresh, and adapt store layout and assortment to improve differentiation, and address shoppers’ concerns about hygiene</li> <li>B. Demand increase of packaged fresh given concerns on hygiene, service counters, and un-packaged food</li> <li>C. Manufacturers to adapt single-product packaging (e.g., protective lids)</li> </ul> | <ul style="list-style-type: none"> <li>A. Develop an agile organization to better assortment</li> <li>B. Evolve offer to be more e-commerce / proximity format friendly</li> <li>C. Simplify store operations (replenishment, inventory, ordering, etc.)</li> <li>D. Reduce operational complexity and ensure availability of basics</li> <li>E. Control and maintain manufacturing costs given variations in material costs</li> </ul> | <ul style="list-style-type: none"> <li>A. Gather insights from consumers on expectations from the brand regarding safety &amp; health components</li> <li>B. Build and implement brand proposition with clear purpose to contribute to people, planet, and health</li> <li>C. Implement plans to deliver the brand’s purpose, then measure and report on the impact to people and the planet</li> </ul> |
|--|---|---|---|---|



# HIGHLIGHTED CASE STUDIES

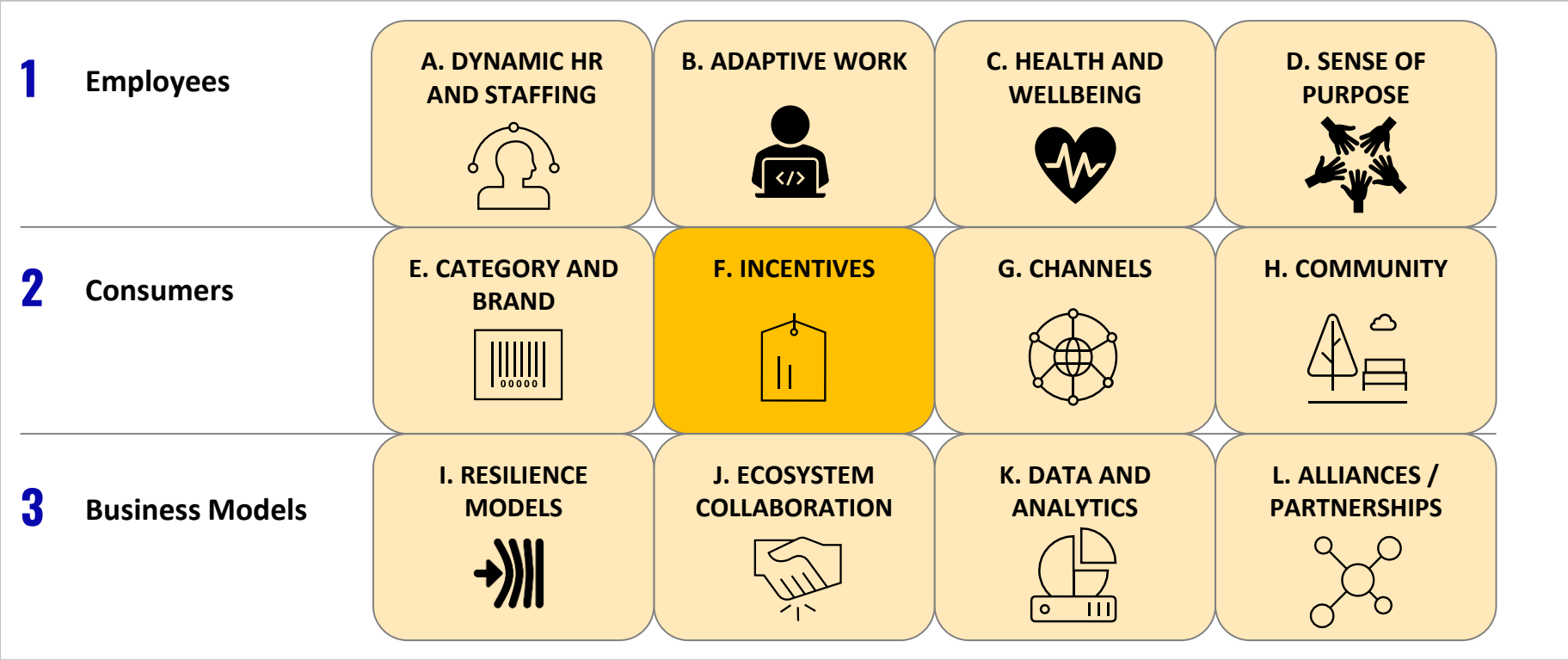
Case Study (CS) Module Legend:

- (E) Employees
- (D) Digital and online
- (S) In store
- (C) In communities

| Logo | Name / Region            | CS Module | Overview  | Contact  |
|------|--------------------------|-----------|---|--|
|      | Ajinomoto<br>            |           | Ramped up development and production of raw materials needed for detergents and diagnostic test kits                                  | <b>Yukiko Takatori</b> ,<br>General Manager,<br>Science Communication<br>Group                       |
|      | X5<br>                   |           | Selling key staple foods at the cost amount for at least one month to support vulnerable populations                                  | <b>Maria Podkopaeva</b> ,<br>Project Manager,<br>Sustainable<br>Development                          |
|      | Franprix & Monoprix<br>  |           | Created three baskets of various products and prices to make for easy & quick shopping for elderly and disabled                       | <a href="#">RTL Article Link</a> , or<br>contact Sharon Bligh at<br>The Consumer Goods<br>Forum      |
|      | Ebro Foods<br>           |           | Ramped up pasta and rice to meet growing demand   | <a href="#">ESM Magazine Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum      |
|      | Vermont Country Deli<br> |           | Selling bread to local hospital and working employees, selling raw ingredients as a new product to help those cooking at home         | <a href="#">COVID Innovations Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
|      | Aldi<br>                 |           | Selling food parcels on website for the first time so vulnerable people can order all products needed for healthy meals at lower risk | <a href="#">Retail Gazette Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum    |

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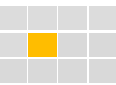
# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



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- Search “**New Normal**” in the GLM for all module new normal summaries





# LEARNINGS SUMMARY OVERVIEW



## Maintaining Business Continuity (Short-term)

## Managing the Crisis (Medium-term)

### Challenges/ trends

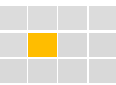
- Promotional elasticity is likely to decrease given the primary focus on meeting “basic needs”
- Need for consumer health & safety
- Evolution of elderly as consumer group (i.e., shopping support initially)
- Pantry-loading and panic buying: consumers depend on stores to have necessary items and provide safe in-store environment

- Pressure from recession: more focus on discount products and attractive promotions
- Shifts in current consumer segmentations as retailers and manufacturers lose certain consumers but gain on others
- Consumers expect brands to tell the truth, value people over profits, and use resources for greater good

### Key learnings

- Reduce / redirect promotions to ease store and supply chain operations
- Shift focus of promotions to online and reduce / eliminate physical marketing efforts (e.g., leaflets)
- Manage consumer disappointment with out of stocks
- Step-up in-store hygiene and adopt social distancing practices
- Communicate to consumers that the organization cares about their safety and consumption needs
- Promote ways for at-risk groups to shop without physically entering stores
- Manufacturers to collaborate with retailers by maintaining prices during lockdown period

- Tactically revise pricing and promotional plans to meet shoppers’ needs and reduced consumer confidence
- Shift more promotions to consumer-specific actions
- Institutionalize hygiene practices
- Proactive communication with consumers regarding steps retailers and manufacturers are taking to maintain safety for all
- Manufacturers launch social help campaigns (e.g., repurposing manufacturing plants and materials to produce hand sanitizers and PPE)
- Prepare multiple phase 3 scenarios
  - Change promotions strategy to maintain large and less frequent baskets to preserve consumer loyalty
  - The “new normal” proposition where the retailer can lead the market or respond most effectively

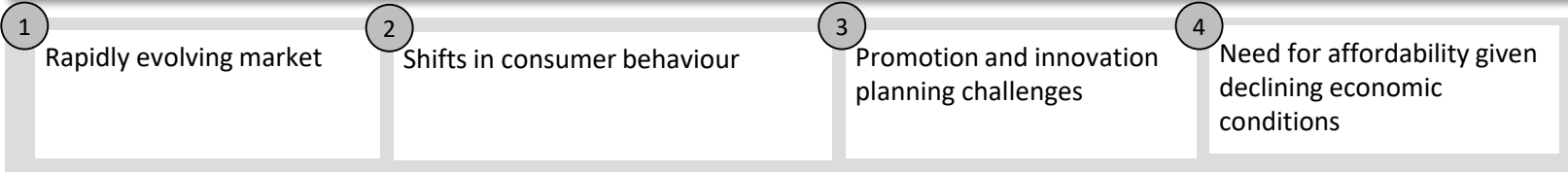


# NEW NORMAL HIGHLIGHTED INSIGHTS



## Adapting to the New Normal (Long-term)

### Emerging Issues



### Strategic implications

- |  |   |   |   |
|--|---|---|---|
| <ul style="list-style-type: none"> <li>A. Determine desired position in the reset market, and how to migrate current captive consumer base to continue shopping long-term. DON'T wait for the market to determine where you belong</li> <li>B. Adapt "real time" with fresh data from loyalty programs, online channels, and social listening to improve pricing strategies and curate promotional and loyalty programs</li> <li>C. Manufacturers to take opportunity to communicate commitments to society</li> </ul> | <ul style="list-style-type: none"> <li>A. Analyse the structure and profitability of consumer base in context of the market reset</li> <li>B. Decide which shopping styles were predominant in the environment where price was not a deciding factor (i.e., healthier eating, store-cupboard recipes, more e-commerce)</li> <li>C. Re-position your brand for the "new normal" shopping world, including clear view on price position</li> <li>D. Use "new normal" situation to redesign and focus brand and promotional plans: focusing on traffic, innovation, new channels, and value creation</li> <li>E. Manufacturers to leverage recent sell-through data to focus communication and innovation</li> </ul> | <ul style="list-style-type: none"> <li>A. Manufacturers and retailers to plan promotions jointly</li> <li>B. Bring new products through the system faster – COVID-19 showed that this is possible</li> <li>C. Use detailed retail insights to define where innovation is needed</li> <li>D. Adapt promotional planning to new consumer elasticities and supply chain realities</li> </ul> | <ul style="list-style-type: none"> <li>A. Promote affordability for as much of the population as possible by designing specific value propositions (e.g., core products, affordable pack size by unit, product promotions)</li> <li>B. Prioritize ensuring that the target consumer will be able to afford the essential products and communicate to the community</li> <li>C. Innovate products, services, and financial mechanisms to optimize for affordability for as much of the population as possible</li> </ul> |
|--|---|---|---|



# HIGHLIGHTED CASE STUDIES

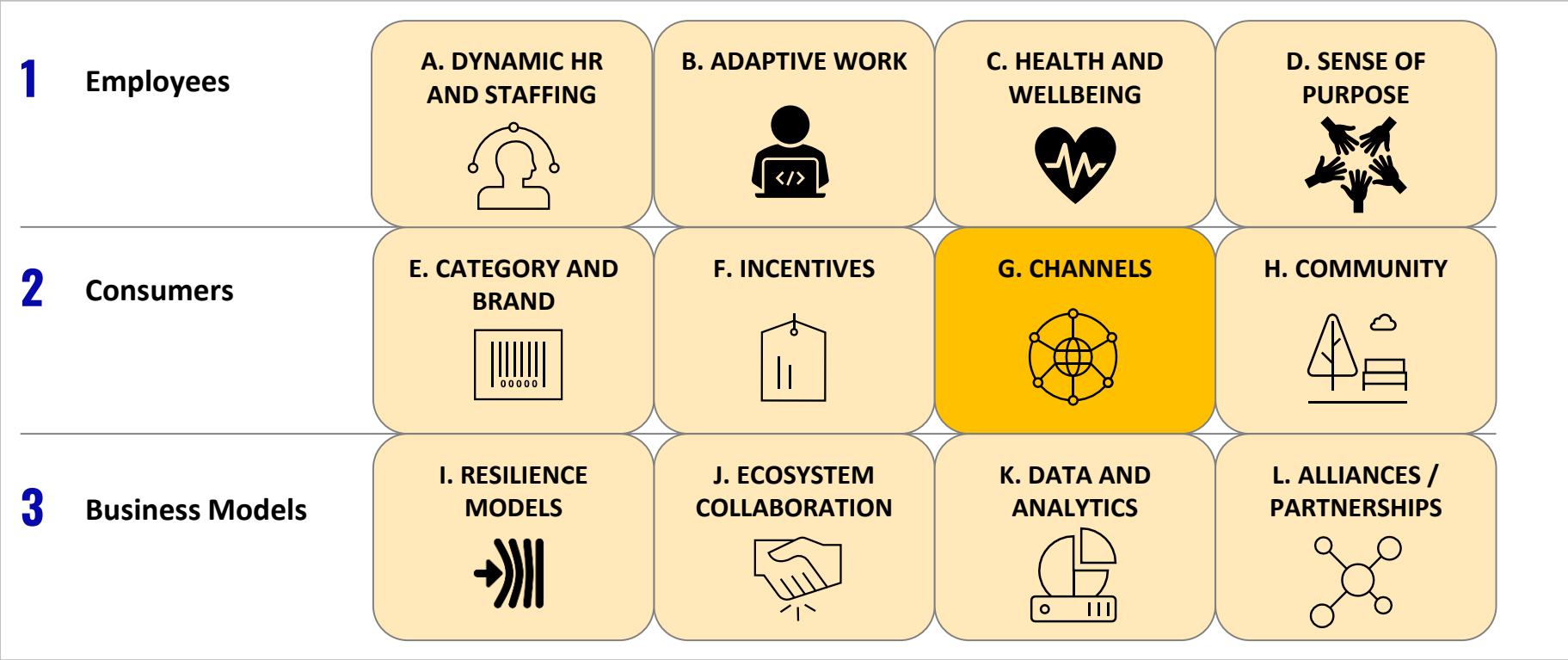
Case Study (CS) Module Legend: E Employees D Digital and online

S In store C In communities

| Logo | Name/Region      | CS Module | Overview   | Contact  |
|------|------------------|-----------|--|--|
|      | Amazon<br>       |           | <span>E</span> <span>D</span> <span>S</span> <span>C</span><br>Prioritize shipments for medical supplies & household staples   | <a href="#">USA Today Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
|      | Tesco<br>        |           | <span>E</span> <span>D</span> <span>S</span> <span>C</span><br>On promotions, focuses on 'simple pricing' for single products and removed multi-buy promotions                                     | Judith Robinson, Head of Health  |
|      | Coop<br>         |           | <span>E</span> <span>D</span> <span>S</span> <span>C</span><br>Froze prices of packaged goods for two months (private-label & manufacturers)   | <a href="#">Coop Italia Link</a> , or contact Sharon Bligh at The Consumer Goods Forum       |
|      | Walgreens<br>    |           | <span>E</span> <span>D</span> <span>S</span> <span>C</span><br>Frontline Hero Discount Day – 30% off regularly priced Walgreens brand and 20% off national brands on 4/25 at all open US locations | Robert Tompkins, Group Vice President, GrI. Merch. Manager, Health & Wellness                |
|      | Auto Mercado<br> |           | <span>E</span> <span>D</span> <span>S</span> <span>C</span><br>Campaigns for consumers to embrace healthy lifestyle and reinforce distance needs   | Anabelle Durán, Marketing Manager  |
|      | Disney<br>       |           | <span>E</span> <span>D</span> <span>S</span> <span>C</span><br>Released video on how to make their famous Churros since they have closed for COVID-19  | <a href="#">Deseret Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum   |
|      | Walmart<br>      |           | <span>E</span> <span>D</span> <span>S</span> <span>C</span><br>"Los Esenciales" program includes 125 products which will be sold at the lowest prices on the market for a period of 60 days        | Marcus Osborne, Vice President, Walmart Health   |
|      | Lush<br>         |           | <span>E</span> <span>D</span> <span>S</span> <span>C</span><br>Offers free hand washing facilities at its stores across the UK; promote hand washing guidelines                                    | Contact Sharon Bligh at The Consumer Goods Forum   |

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# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



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# LEARNINGS SUMMARY OVERVIEW



G. CHANNELS

## Challenges/ trends

### Maintaining Business Continuity (Short-term)

- Sudden surge of e-commerce and format shifts
- Reduced staff availability, but increased needs (higher volumes)
- High spikes in out of stock and shrink
- Online demand well beyond picking capacities

### Managing the Crisis (Medium-term)

- Acceleration scenario for online growth and, in some areas, shift toward convenience
- Recovery of staff but restrictions in place
- Unstable operational KPIs and in-store service standards
- Lower consumer loyalty
- Growing demand / loyalty to delivery and online systems
- Public transportation availability decreases
- Supermarkets see increase due to one-stop availability



## Key learnings

- Tactically revise forecasts
- Reinforce operations with additional staff and shifts
- Focus assortment and offers on high running SKUs to optimize productivity; cancel promotions
- Adjust planograms; if needed, set up purchase limits
- Suspend supplier penalization for incomplete, late / early deliveries etc.
- Evaluate need to close stores that are difficult to serve or have limited staff availability
- Leverage consumer loyalty and mobile ecosystems

- Reinforce resources: FTEs, delivery partnerships, etc.
- Reinforce convenience store assortment and operations
- Increase flexibility in staff employment guides or contracts
- Implement control mechanisms and scorecards on store operational KPIs
- Develop consumer development and retention campaigns
- Ramp up economic fulfilment capability for online
- Continue refining and advancing operations of online ordering and delivery / curbside pickup processes

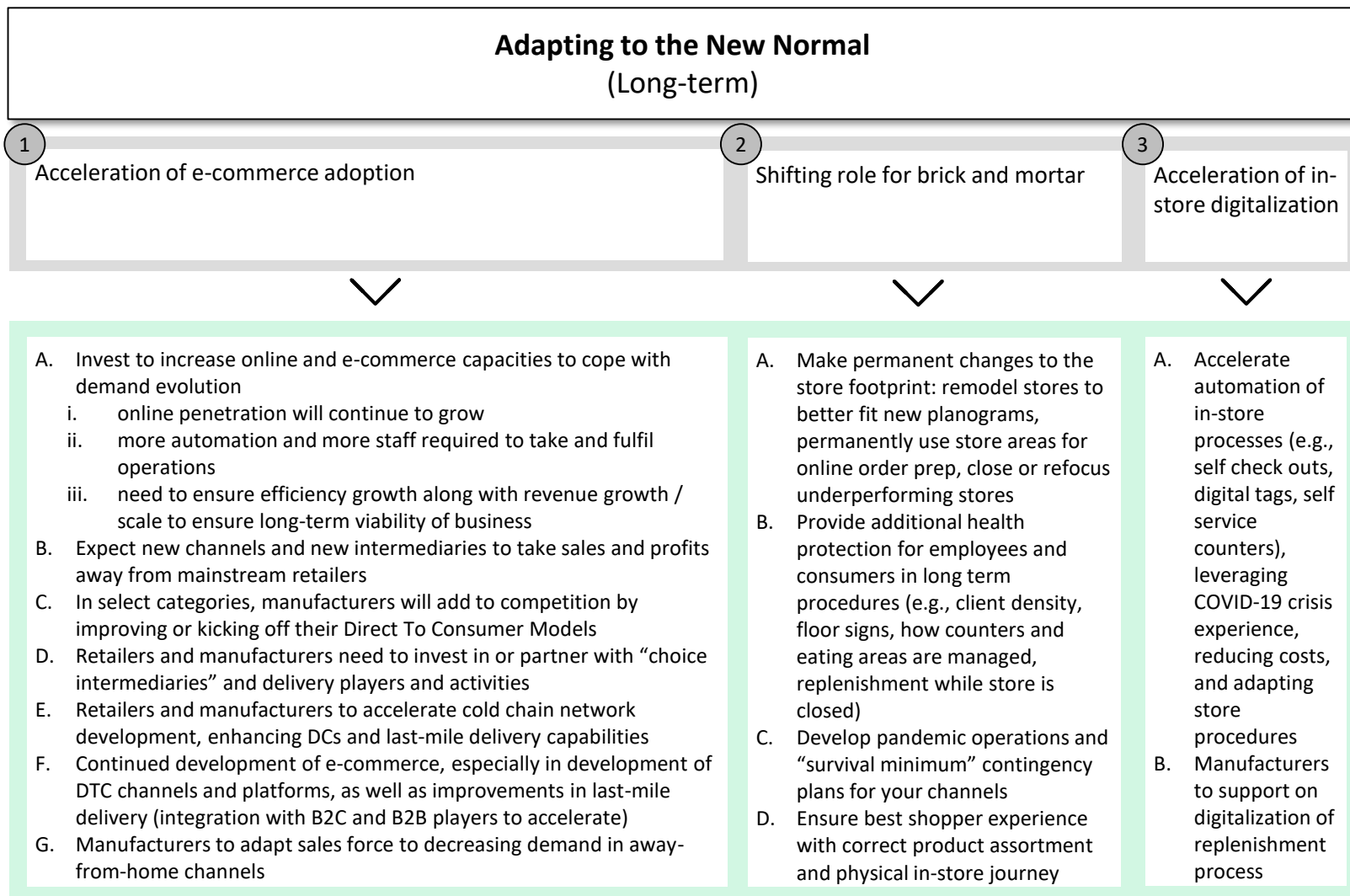


# NEW NORMAL HIGHLIGHTED INSIGHTS



## Emerging Issues

## Strategic implications





# HIGHLIGHTED CASE STUDIES (1 OF 2)

Case Study (CS) Module Legend:

- (E) Employees
- (D) Digital and online
- (S) In store
- (C) In communities

| Logo | Name / Region      | CS Module | Overview  | Contact  |
|------|--------------------|-----------|---|--|
|      | Walgreens<br>      |           | (E) (D) (S) (C)<br>Provide pharmacy chat available 24/7 online and through the Walgreens app  | Robert Tompkins,<br>Group Vice President, Grl. Merch. Manager, Health & Wellness                     |
|      | New Hope Liuhe<br> |           | (E) (D) (S) (C)<br>Promoting industrial Internet apps for sales, emergency notifications, and prevention measures for farmers; live broadcast classrooms                        | Li Qin,<br>Director of Business Development  |
|      | Vkusvill<br>       |           | (E) (D) (S) (C)<br>Installed vending machines in residential buildings  | <a href="#">COVID Innovations Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
|      | DIA<br>            |           | (E) (D) (S) (C)<br>Eight additional stores will exclusively process online orders   | <a href="#">ESM Magazine Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum      |
|      | Spar<br>           |           | (E) (D) (S) (C)<br>Introduced Udamarket's mobile retail technology to allow customers to see what is in stock and Scan, Pay, and Go; includes nutrition & recycling information | <a href="#">SPAR Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum              |

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# HIGHLIGHTED CASE STUDIES (2 OF 2)

Case Study (CS) Module Legend:

- (E) Employees
- (D) Digital and online
- (S) In store
- (C) In communities

| Logo | Name / Region                  | CS Module           | Overview   | Contact  |
|------|--------------------------------|---------------------|--|--|
|      | FairPrice<br>                  | <br>(E) (D) (S) (C) | Increase digital communications on managing customer assurance & expectations; increase social media content for consumers               | Grace Chua, Chief Strategy Officer and Deputy Head, Products Division                                |
|      | Waitrose & Partners<br>        | <br>(E) (D) (S) (C) | Cookery School chefs share tips on Instagram due to temporary closure  | <a href="#">ESM Magazine Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum      |
|      | Alibaba, JD.com, Pinduoduo<br> | <br>(E) (D) (S) (C) | Help revive Hubei's agriculture sector sales by launching e-commerce programs & initiatives (special pages on app) and marketing support | <a href="#">SCMP Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum              |
|      | Schwarzkopf<br>                | <br>(E) (D) (S) (C) | Enable salons to create and sell digital vouchers to their customers who soon need their post quarantine hair done                       | <a href="#">COVID Innovations Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
|      | Deciem and Kiehl's<br>         | <br>(E) (D) (S) (C) | Launch one-on-one digital consultations to keep employees employed and help customers find right products from home                      | <a href="#">COVID Innovations Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |

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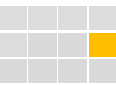
# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



|                          |                                       |                                       |                                    |  |
|--------------------------|---------------------------------------|---------------------------------------|------------------------------------|--|
| <b>1</b> Employees       | <b>A. DYNAMIC HR AND STAFFING</b><br> | <b>B. ADAPTIVE WORK</b><br>           | <b>C. HEALTH AND WELLBEING</b><br> | <b>D. SENSE OF PURPOSE</b><br>         |
| <b>2</b> Consumers       | <b>E. CATEGORY AND BRAND</b><br>      | <b>F. INCENTIVES</b><br>              | <b>G. CHANNELS</b><br>             | <b>H. COMMUNITY</b><br>                |
| <b>3</b> Business Models | <b>I. RESILIENCE MODELS</b><br>       | <b>J. ECOSYSTEM COLLABORATION</b><br> | <b>K. DATA AND ANALYTICS</b><br>   | <b>L. ALLIANCES / PARTNERSHIPS</b><br> |

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# LEARNINGS SUMMARY OVERVIEW



## Maintaining Business Continuity (Short-term)

### Challenges/trends

- Importance of health and safety of employees and community, especially high-risk populations
- Specific areas / geographies may be adversely more affected



### Key learnings

- Provide in-store signage to educate, serve, and protect local communities
- Engage with local communities and health organizations to protect shoppers and employees
- Support local areas and staff to best manage where issues may be more severe
- Constantly communicate online with the right tone and be a "local friend"
- Support the local community with initiatives to support mental health

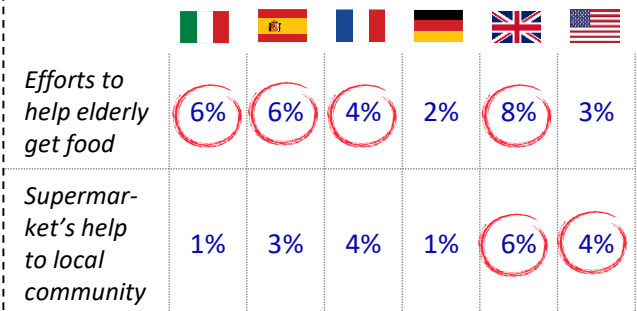
## Managing the Crisis (Medium-term)

- Government restrictions may challenge operations going forward
- Having worked / served throughout the crisis, food retailers and manufacturers may become a more visible authority on COVID-19 and on other issues in general

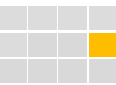


- Work and establish close partnerships with local authorities to collaborate through the crisis and its aftermath
- Develop new community partnerships to better educate community and reduce spread
- Step up engagement in between industry associations and community organizations
- Build local store marketing programs to make the community aware of store's efforts

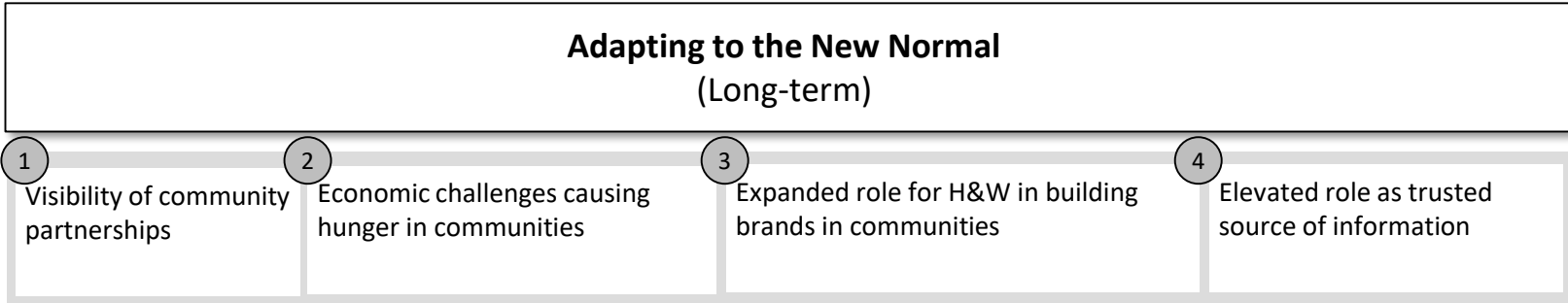
### OW Social Listening: Supermarket social responsibility, % of tweets



**Customers' reactions to the critical role of food retailers during the COVID-19 crisis is very relevant in social networks.** Failing to lead on social responsibility can be harmful for a retailer's customer perception for the long-term.



# NEW NORMAL HIGHLIGHTED INSIGHTS



**Emerging Issues**

**Strategic implications**

|  |  |   |   |
|--|--|---|---|
| <ul style="list-style-type: none"> <li>A. Food retailers and distribution services are essential during COVID-19 to keep communities well-fed and safe</li> <li>B. Retailers should continue to strengthen role in the community store by store and ensure repositioning of general image and message to be a constant source of trusted help for consumers</li> </ul> | <ul style="list-style-type: none"> <li>A. Retailers and manufacturing plants alike are local in nature – “my mom and sisters work there” –making them well placed to engage with and support local communities</li> <li>B. Lower-income workers in the hardest-hit industries (e.g., food service workers) may be significantly affected by potential for recession causing hunger; food retailers and manufacturers can look to directly address</li> <li>C. Retailers and manufacturers can prepare by engaging with local communities to run programs (e.g., food drives and food donations)</li> </ul> | <ul style="list-style-type: none"> <li>A. While some companies have built strong health and wellness programs, the climate demands that all industry players look at consumer wellbeing</li> <li>B. Similar to the 2007-2009 recession, there likely will be an increased development of stress-related conditions, which will also be elevated on the health and wellness agenda</li> <li>C. Expand to partner with local organizations to support on non-COVID-19 conditions</li> </ul> | <ul style="list-style-type: none"> <li>A. Having been on the frontlines of the COVID-19 crisis, food retailers and manufacturers will soon serve as a trusted information provider</li> <li>B. Share this knowledge and educate others through information boards, website presence, employee education, and public sector advisor roles to prevent, mitigate, and manage future pandemics</li> <li>C. Leverage community actions without opportunism and with clear communication</li> </ul> |
|--|--|---|---|



# HIGHLIGHTED CASE STUDIES (1 OF 2)

Case Study (CS) Module Legend:

- (E) Employees
- (D) Digital and online
- (S) In store
- (C) In communities

| Logo | Name / Region                     | CS Module | Overview  | Contact  |
|------|-----------------------------------|-----------|---|--|
|      | Colgate Palmolive<br>             |           | Mobilized 5 manufacturing plants to produce 25M soap bars to donate   | <a href="#">Business Wire Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
|      | Walgreens<br>                     |           | Used closed locations in May for testing locations; expanded drive-thru testing at open locations           | <b>Robert Tompkins</b> , Group Vice President, Grl. Merch. Manager, Health & Wellness            |
|      | Danone<br>                        |           | Delivered safe drinking water to hospitals, clinics, elderly homes, and community centers                   | <b>Isabelle Grosmaître</b> , Alimentation Initiative Catalyst                                    |
|      | Mars Fishcare<br>                 |           | Made and donated hand sanitizer for first responders  | <b>Alex West</b> , Director, Global Public Affairs   |
|      | L'Oréal<br>                       |           | Ramped up production of hand sanitizer to donate to food distribution & hospitals                           | Contact Sharon Bligh at The Consumer Goods Forum   |
|      | Lawson Inc.<br>                   |           | Distributed food to school children, set up helpline to deliver meals to affected patients                  | <b>Miho Yomoda</b> , Deputy Director, Health & Wellness Promotion Centre                         |
|      | Perifem, FCD, Comerso<br>         |           | Platform to connect retail unsold goods with foodbanks / charities  | Contact Sharon Bligh at The Consumer Goods Forum   |
|      | Sainsbury's / WHSmith<br>         |           | Extend supply partnership to hospitals – NHS staff will have 20% discount on all products (incl. Sainsbury) | <b>Ninali Sritharan</b> , Sainsbury's Healthy Living Manager                                     |
|      | Royal Swinkels Family Brewers<br> |           | Repurposed cellar beers to make disinfectants and donate to hospitals & care homes                          | <a href="#">LinkedIn Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum      |

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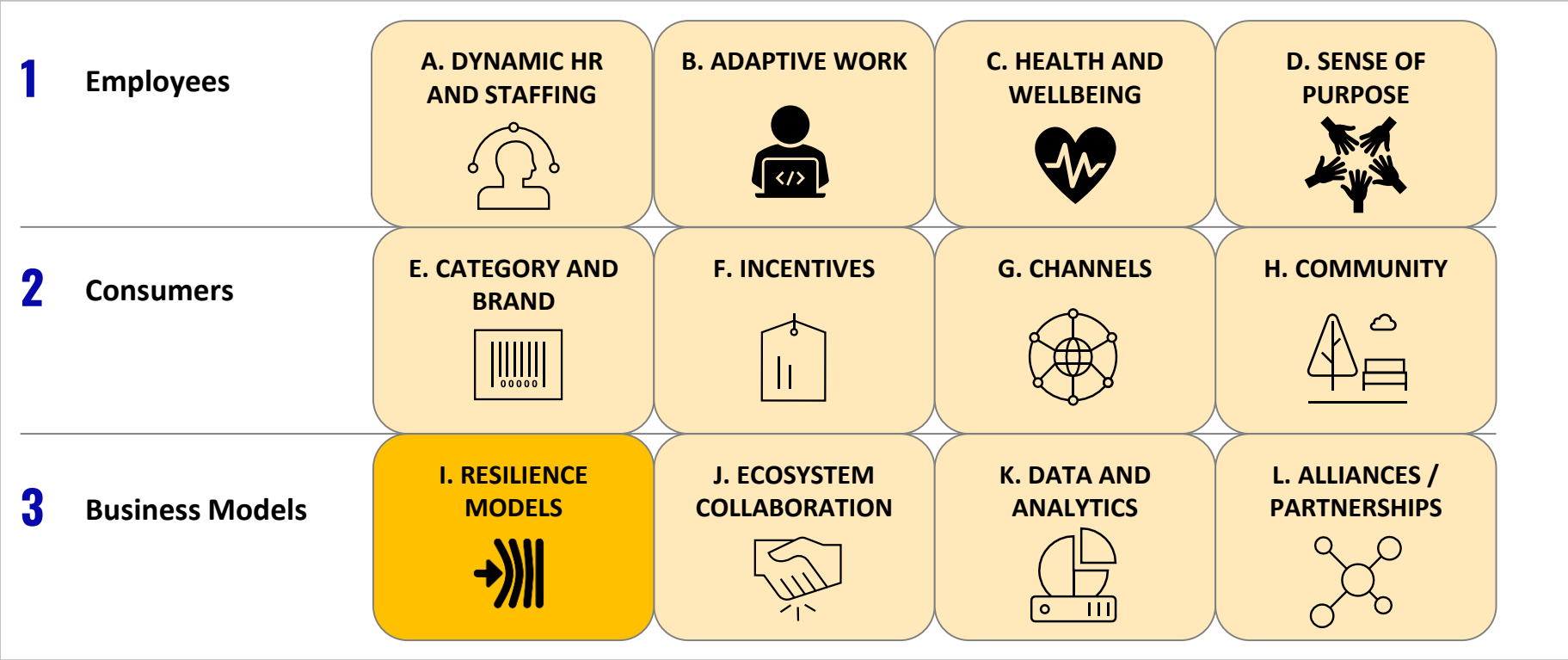
# HIGHLIGHTED CASE STUDIES (2 OF 2)

Case Study (CS) Module Legend:   
 (E) Employees    (D) Digital and online   
 (S) In store        (C) In communities

| Name / Region     | Logo | CS Module | Overview | Contact |  |  |
|-------------------|------|-----------|----------|---------|--|--|
| Barilla           |      |           |          |         | Donated to US non-profit to fund research on a COVID-19 therapy based on stem cells  | Anna Rosales, Director of Nutrition and Science Affairs  |
| Marks & Spencer   |      |           |          |         | Donated uniforms & scrubs for hospitals and clothing packs for discharged patients   | Laura Street, Company Nutritionist at M&S  |
| Spar              |      |           |          |         | Created volunteer responders programme to shop for vulnerable persons in SPAR stores   | <a href="#">SPAR Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum        |
| Decathlon         |      |           |          |         | Donated entire stock of snorkeling masks to hospitals once aware this was used to keep COVID-19 patients safe                    | <a href="#">France TV Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum   |
| El Corte Inglés   |      |           |          |         | Offered hotel space to be used by hospitals to treat COVID-19 patients   | <a href="#">Food Retail Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
| Johnson & Johnson |      |           |          |         | Donated surgical masks, generators, medical devices, isopropyl alcohol, contact lenses, and scientists                           | Donna Padovano, Director Global Retail Health Innovation                                       |
| Nestlé            |      |           |          |         | Mobilized entire value chain to launch global response; raised awareness of online resources that helps families find free meals | Saliha Barlatey, Head of Corporate Industry Affairs  |

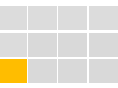
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# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



*Looking for similar sections?*

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- Search “**New Normal**” in the GLM for all module new normal summaries



# LEARNINGS SUMMARY OVERVIEW

## I. RESILIENCE MODELS



### Challenges/ trends

### Key learnings

#### Maintaining Business Continuity (Short-term)

- All operations have shifted drastically; some companies seeing an unpredicted increase (i.e., grocery, retail sales of certain products) and others seeing a drastic halt in sales (i.e., food and beverage manufacturers with food service customers)
- Though companies are trying to cut costs, some fixed costs cannot be reduced
- Re-examine business models due to immediate changes in employees, demand, and channels



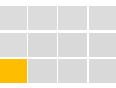
- Conserve cash by cutting variable costs in various ways:
  - Negotiate reduced / delayed payments for rent where possible
  - Reach out to creditors to negotiate for more time for debt payments
  - Cancel extra orders from suppliers and negotiate a delay in payment
  - Re-examine executive pay
  - Carve out essential roles for workers to keep as many as possible
- Convert stores to support click & collect and online

#### Managing the Crisis (Medium-term)

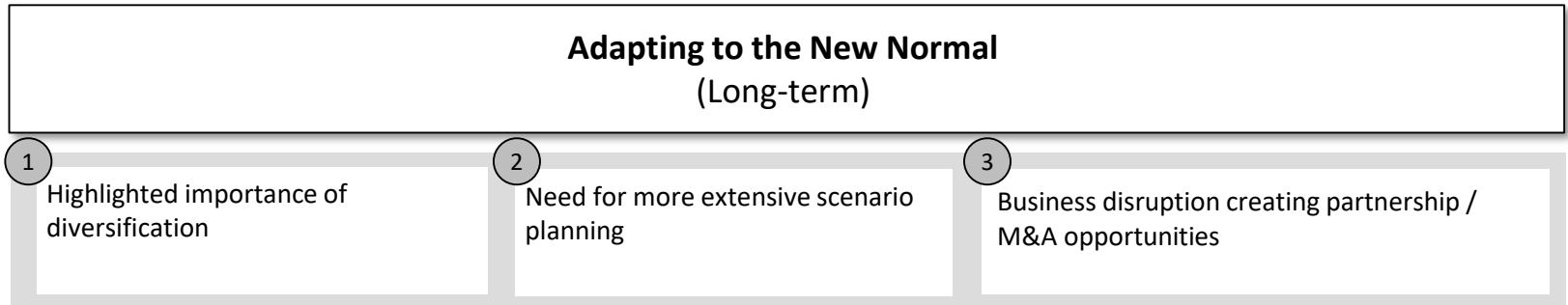
- Need to shed unprofitable areas and rapidly finance growing ones
- Shift from immediate business model changes to forecasting and budget planning for the rest of the year
- Aim to increase financial resilience
- Need for scenario planning



- Shift investment focus from growth to stable profits
- Continue investments in post-COVID-19 environment to be focused on deliveries and contactless payment
- Initiate and conduct cost base reset (including leveraging COVID-19 efficiencies and learnings) for short-term cost reduction and for survival minimum
- Start investing to simplify and automate store operations, become leaner
- Continue to assess scenarios for financial development (be ready to seize opportunities)
- Consider more direct-to-consumer alternative business models that allow consumers to avoid or shorten in-store shopping trips



# NEW NORMAL HIGHLIGHTED INSIGHTS



**Emerging Issues**

**Strategic implications**

|   |   |  |
|---|---|--|
| <p>A. Leverage proven ability to respond to COVID-19, brand strength, and geographical footprint to become distribution partners for other services (e.g., banks, insurers, telcos, car sales, and repair services). Retailers will get additional revenues, interactions / trips and loyalty as consumers can fulfil a wider range of their needs from the same source</p> <p>B. Manufacturers and retailers to develop partnerships / outsource some store aisles (e.g., brown and white goods)</p> | <p>A. The need for frequent transparency and scenario planning that has happened during the outbreak will likely partially stick</p> <p>B. Develop scenario planning with pivot variables and key questions to drive a coherent strategy despite uncertainties</p> <p>C. Prepare financing for alternative and worst case scenarios</p> <p>D. Create additional capabilities for more rapid view of company financials – “visibility and control”</p> | <p>A. Need for investment in new channels (e-commerce and others) and “roles” with investments and divestments</p> <p>B. Assess and conduct M&amp;A and partnership deals to:</p> <ul style="list-style-type: none"> <li>i. Clean, prune, fix: carve out and divest to cut underperforming operations and / or to raise cash</li> <li>ii. Seize opportunities to grow through acquisitions and / or alliances: “new business model” players, real estate locations, distribution assets, and competitors</li> </ul> <p>C. Embrace new default payment mechanisms</p> <p>D. Manufacturers to invest in survival of smaller retailers by supporting their finances (e.g., extending payment terms) to maintain future partnerships</p> |
|---|---|--|





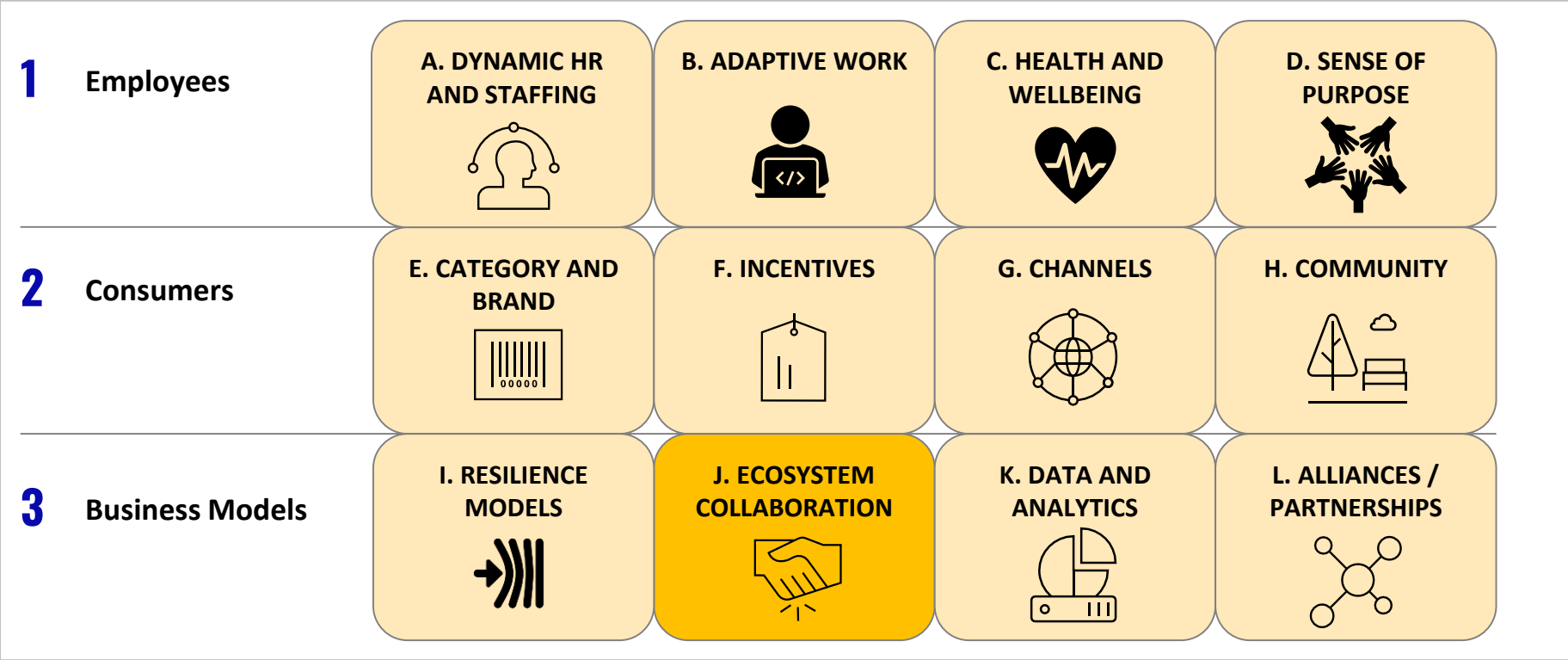
# HIGHLIGHTED CASE STUDIES

|                 |   |           |   |                    |
|-----------------|---|-----------|---|--------------------|
| Case Study (CS) | E | Employees | D | Digital and online |
| Module Legend:  | S | In store  | C | In communities     |

| Logo | Name / Region                                 | CS Module   | Overview   | Contact  |
|------|---|---|--|--|
|      | Rewe<br>                                      |   | <p>E S C</p> <p>Signed syndicated credit line with a consortium of banks to ensure financial flexibility and independence</p>                              | <p><a href="#">ESM Magazine</a>, or contact Sharon Bligh at The Consumer Goods Forum</p>                         |
|      | Ebay<br>                                      | <br>Small businesses have powered eBay for 25 years. Now it's time for us to help power them.   | <p>E D S C</p> <p>Pledges to support small businesses by waiving selling fees and offer new businesses free basic eBay store</p>                           | <p><a href="#">PR Newswire Article Link</a>, or contact Sharon Bligh at The Consumer Goods Forum</p>             |
|      | P&G, ITC, Hindustan Unilever & Nestle,...<br> |   | <p>E D S C</p> <p>Partnering with government to help convert neighborhood suraksha stores into sanitized professional retail operations</p>                | <p>Dawn Elvin, VP Global Pharmacy &amp; Sales Personal Healthcare International</p>                              |
|      | Migros Ticaret<br>                            |   | <p>E D S C</p> <p>Transformed some of the stores to dark stores to meet demand of online operations</p>  | <p>Ahu Baskut Alyanak, Corporate Comms. Director<br/>Demir Aytac, Business Alliance Executive</p>                |
|      | Alibaba<br>                                   |   | <p>E D S C</p> <p>Self-service technologies have been adopted – face mask vending machines, hot meal vending containers, unmanned grocery stores, etc.</p> | <p><a href="#">COVID Innovations</a>, or contact Sharon Bligh at The Consumer Goods Forum</p>                    |
|      | Lego<br>                                      | <br>"I think there will be a push for companies to continue to be good citizens and desisting on purpose and not just optimizing the financial bottom line."<br>JACQUES VAN RENSTEDDING, Director, Chairman LEGO Brand Review<br>Apple Podcasts | <p>E D S C</p> <p>Increase in technology investments due to online sales channels and emerging customer behavior</p>                                       | <p><a href="#">BCG Henderson Institute Article Link</a>, or contact Sharon Bligh at The Consumer Goods Forum</p> |

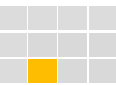
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# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



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- Search “**New Normal**” in the GLM for all module new normal summaries



# LEARNINGS SUMMARY OVERVIEW



## Challenges/ trends

### Maintaining Business Continuity (Short-term)

- DCs and logistics saturated (given high demand, scarcity of drivers, etc.)
- Some manufacturers incapable of fulfilling all orders
- Demand spikes in online
- Out-of-home options closed, but people still want to order



## Key learnings

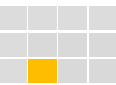
- Organize suppliers to directly serve stores or store hubs
  - Increase delivery capacity using last-mile delivery partners
  - Partnerships to offer practical, yet unique, offerings (i.e. restaurants / chains to prepare eat-at-home meals)
- Examples of supply chain collaboration**
- General Mills is skipping steps in supply chain by bypassing its own warehouses and delivering straight to store warehouses
  - Smart & Final stores in US are planning to bypass distribution centres where possible
  - Amazon is not accepting shipments of certain products in its warehouses in order to free up space for critical medical supplies and household products
  - Sysco and PFG are leveraging its supply chain services to food retail

### Managing the Crisis (Medium-term)

- Increased criticality of certain suppliers and need for new ones
- Demand through online channels still far above capacity
- Work-from-home continuing among large share of population
- Still low demand for out-of-home options



- Integrate with critical suppliers (e.g., fix demand volumes, data sharing) and / or add new suppliers
  - Extend delivery partnerships forged during the crisis
  - Enter into discussions to offer a wider range in stores
  - Evaluate acquiring or partnering with choice intermediaries and last-mile delivery companies
- Examples of supplier payment terms**
- Morrison's in UK aims for 48 hour payment terms, rather than 14 days
  - Tesco in UK shortens period of payment terms from 14 to 5 days
  - Aldi announced immediate payment terms to small suppliers (<£1m) as well as Systeme U in France (<50m€)
  - Sainsbury's moves to immediate payment terms
  - Walmart revised supplier financing agreements so that suppliers get payments more quickly

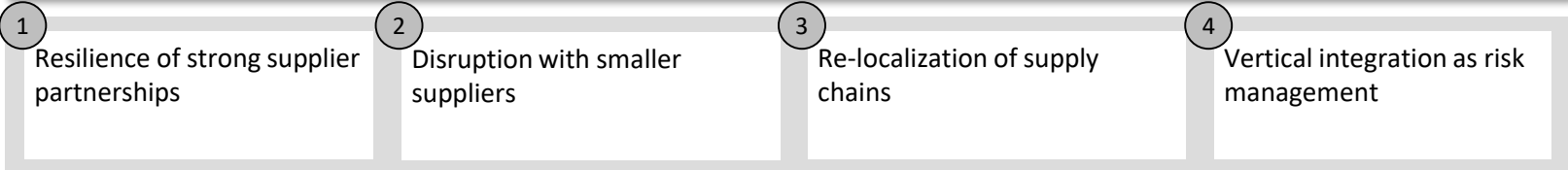


# NEW NORMAL HIGHLIGHTED INSIGHTS



## Adapting to the New Normal (Long-term)

### Emerging Issues



### Strategic implications

|  |  |   |  |
|--|--|---|--|
| <ul style="list-style-type: none"> <li>A. With price pressure as well as faster changes in consumer trends and shorter innovation cycles, need suppliers that can work closely to develop the next bestseller</li> <li>B. Gather wide ecosystem to share data, provide insights from daily contact with consumers, and jointly identify and brainstorm new trends</li> <li>C. Learn from B2B players' consumer focus and establish partnerships</li> </ul> | <ul style="list-style-type: none"> <li>A. Shorten payment terms to support manufacturers and / or farmers, especially smaller suppliers</li> <li>B. May take equity in suppliers that are critical, leading to new, deeper financial ties and easing future collaboration</li> <li>C. COVID-19 has showed the strengths and weaknesses of working with small suppliers, and their reduced capabilities to invest in R&amp;D and increase production in short term</li> <li>D. Where relevant, invest in PL suppliers and / or farmers or support their consolidation with stronger business partners with increased scale and investment capability</li> </ul> | <ul style="list-style-type: none"> <li>A. Local sourcing has become a solution to overcome limited international production, reduced transportation availability, and movement restrictions</li> <li>B. Retailers should support manufacturers and farmers to get more on-shore / near-shore production capacity to become less dependent on long international supply chains</li> <li>C. Create (or continue) coalitions that or collaborate and leverage the strengths of each organization within the value chain for positive impact in the world (e.g. health and wellness, sustainability, etc.)</li> </ul> | <ul style="list-style-type: none"> <li>A. Follow examples of retailer and manufacturer collaboration for supply chain issues</li> <li>B. Retailers can learn from these issues and prepare pandemic plans to secure supply (including logistics, critical food products, and hygiene items) using vertical integration</li> <li>C. Across countries, the agreements for online delivery may continue, taking into consideration growth of online delivery</li> </ul> |
|--|--|---|--|



# HIGHLIGHTED CASE STUDIES (1 OF 2)

Case Study (CS) Module Legend:

- (E) Employees
- (D) Digital and online
- (S) In store
- (C) In communities

| Logo | Name / Region                      | CS Module | Overview   | Contact   |
|------|------------------------------------|-----------|--|---|
|      | Kroger<br>                         |           | Purchasing gallons of milk from dairy farmers who have struggled to find new buyers to purchase excess supply            | <a href="#">Food Navigator USA</a> , or contact Sharon Bligh at The Consumer Goods Forum    |
|      | Danone<br>                         |           | Financial support for small value chain partners, extended payment terms, and relief fund                                | Isabelle Grosmaître, Alimentation Initiative Catalyst                                       |
|      | Walmart México & Centroamérica<br> |           | Temporary program to support micro and small suppliers – shorten payment period & waive two months of rent               | Viridiana Hernández, ESG Squad lead<br>Luis Herrerías, Corporate Marketing DM               |
|      | X5<br>                             |           | Offer rent holidays for tenants that had to suspend operations; provide discounts for all those that continue to operate | Maria Podkopaeva, Project Manager, Sustainable Development                                  |
|      | Grocery retailers & Doordash<br>   |           | Grocery retailers have on-demand access to specific Dasher fleets to fulfil deliveries as first priority                 | Contact Sharon Bligh at The Consumer Goods Forum  |
|      | Carrefour<br>                      |           | Commits to source 100% of its products in France once the present stocks are sold out                                    | <a href="#">Lesechos Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
|      | Danone-Blédina<br>                 |           | #MerciLesAgris campaign to thank farmers; encourage buying local   | Isabelle Grosmaître, Alimentation Initiative Catalyst                                       |

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# HIGHLIGHTED CASE STUDIES (2 OF 2)

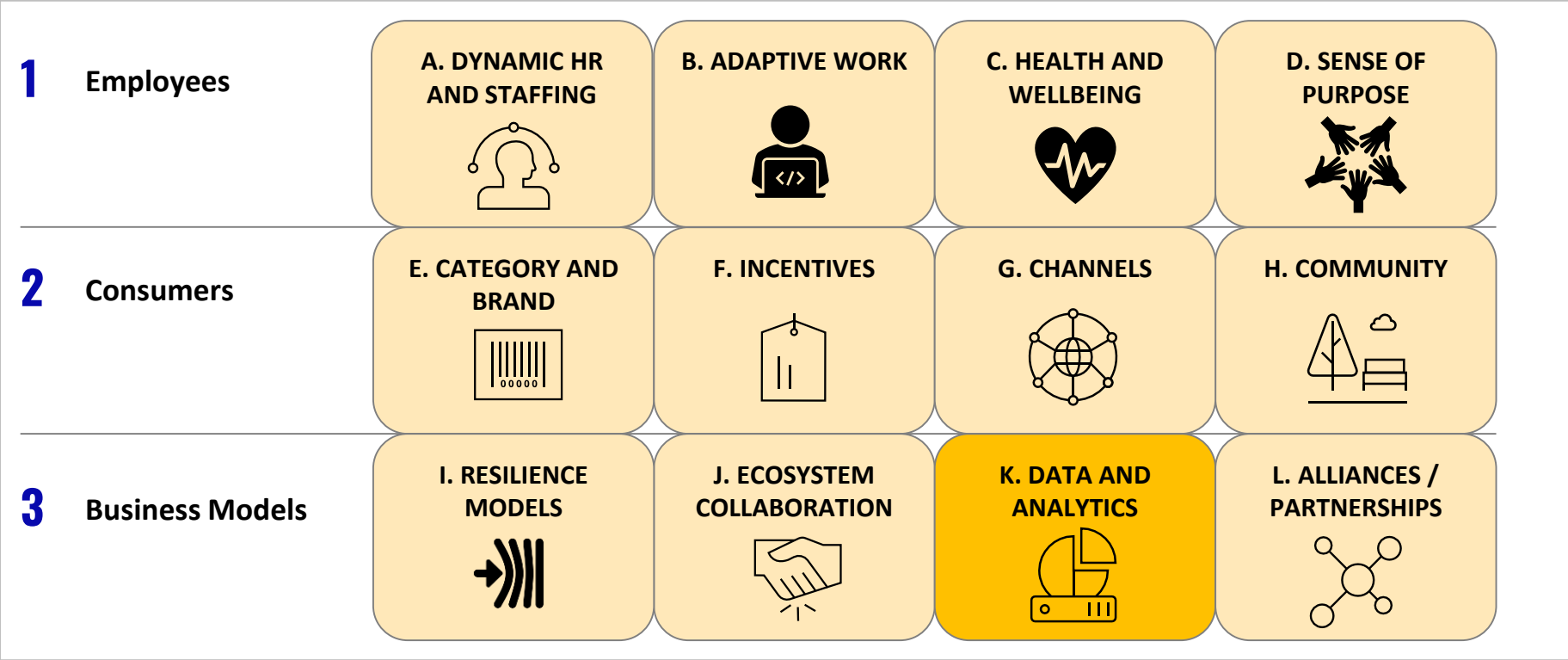
Case Study (CS) Module Legend:

- (E) Employees
- (D) Digital and online
- (S) In store
- (C) In communities

| Logo | Name / Region   | CS Module | Overview  | Contact   |
|------|-----------------|-----------|---|---|
|      | Sainsbury's<br> |           | Help smaller suppliers by paying them immediately and making financing available; increase production volumes quickly to meet consumer demand                             | Nilani Sritharan, Health Living Manager   |
|      | Sonae<br>       |           | Increase number of suppliers as members of its Continente Producers Club, to help more producers maintain sales   | <a href="#">ESM Magazine Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
|      | Grupo Exito<br> |           | Anticipates payments to small and medium sized suppliers to help mitigate impact on cash flows and help preserve employment rate  | Catalina Ramirez, Corporate Marketing and Sustainability Coordinator                            |
|      | Carrefour<br>   |           | Commits to fixed prices and quantities on 10 main species to support French fishing sector  | <a href="#">Carrefour Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum    |
|      | Konzum<br>      |           | Opened additional sales channels for local producers affected by closure of greengrocers; ready to offer repurchasing capacities and sales networks to affected producers | <a href="#">ESM Magazine Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
|      | Lotte<br>       |           | Started a 'Flower Bucket Relay' to help flower farmers that are suffering from cancelled events   | <a href="#">CGF Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum          |
|      | Walmart<br>     |           | Offers rent relief to in-store businesses and changing supply-chain financing program to help qualified suppliers get payments faster                                     | Marcus Osborne, Vice President, Walmart Health  |

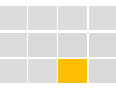
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# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



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# LEARNINGS SUMMARY OVERVIEW

## K. DATA AND ANALYTICS



### Challenges/ trends

#### Maintaining Business Continuity (Short-term)

- Shoppers need alternative methods than physical to get products to reduce exposure
- Maintaining uptime on technology despite disruption
- Fast-track digitalization of essential functions if disrupted
- Usage of analytics to improve product forecasting

#### Managing the Crisis (Medium-term)

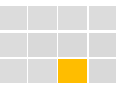
- Technology, security, uptime, and fall-backs essential to resilience
- Demand for more frequent and recent data and analysis of consumers and market
- Increased e-commerce volumes and app usage
- Accelerated requirements for new services

### Key learnings

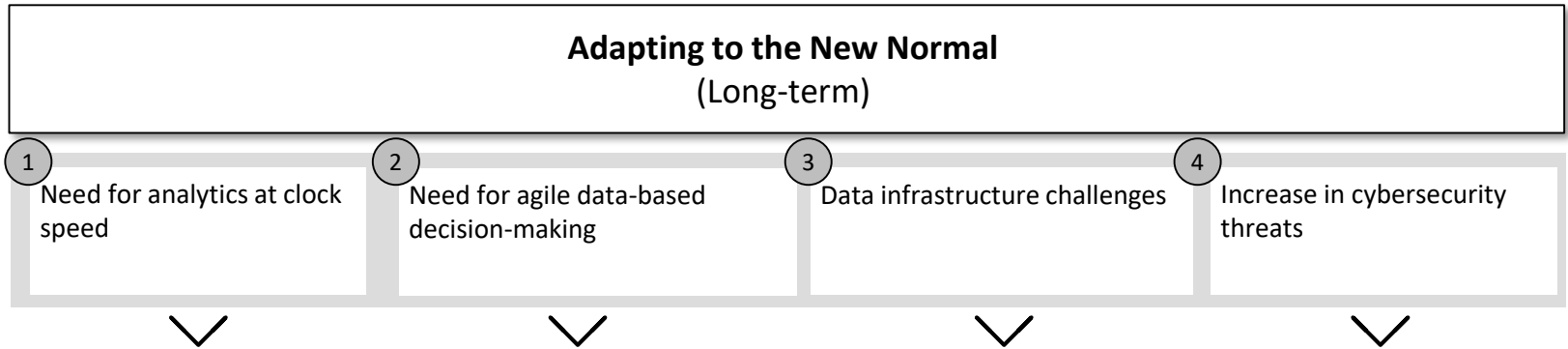
- Stop using business-as-usual algorithms to manage supply chain during the pandemic
- Ensure sufficient short-term capacity in IT solutions
- Rapidly spread practices with other functions and continually reassess their needs
- Gather operational data to inform situational awareness for business
- Expand technologies to cover greater income streams (e.g., delivery, apps, website information)
- Implement data analysis within online / digital innovations and channels

- Triage essential services to keep up vs. those to deregulate to increase agility
- Deploy architecture and policy modifications to enhance quality and speed of information distribution
- Redeploy data scientists and R&D to support decisions
- Enable use of third parties to rapidly add services
- Increase data-sharing between delivery services and CPG manufacturers to help prevent supply chain issues
- Use technology and analytics: tracking apps with processed product scanner to provide nutrition and storage education, or implement identity verification software to eliminate errors, speed up processes, etc.





# NEW NORMAL HIGHLIGHTED INSIGHTS



## Emerging Issues



















## Strategic implications

|  |   |   |  |
|--|---|---|--|
| <ul style="list-style-type: none"> <li>A. In the “new normal” (e.g., exponential growth of e-commerce, faster changes in consumer trends), it is imperative to react faster and deprecate practices that are not critical or too complex</li> <li>B. Utilize payments data and location data to decipher differences in shopper movements across the market to allow a more dynamic response than slower consumer research and panel work</li> </ul> | <ul style="list-style-type: none"> <li>A. Better understanding of consumer needs and market trends has to be complemented with a faster reaction</li> <li>B. Perform faster and more accurate decision making, leveraging:                             <ul style="list-style-type: none"> <li>i. Relevant metrics, tools, and processes to analyze / get insights</li> <li>ii. Real time notifications to decision-makers to take responsibility for launching actions</li> </ul> </li> <li>C. Collaborate on data to maximize sales and improve supply chain efficiency</li> </ul> | <ul style="list-style-type: none"> <li>A. Online, click &amp; collect, and convenience stores have gained traction across consumers; during COVID-19, ~10% of the consumers shifted to online, of which 1/3 is for good</li> <li>B. Retailers and manufacturers need to significantly increase e-commerce and omnichannel-related investment, both for production and management</li> <li>C. Need for systems that allow for vertical or horizontal diversification and extensions</li> <li>D. Enhance data insights and capability to decipher and predict consumer movement and competitive action</li> </ul> | <ul style="list-style-type: none"> <li>A. The COVID-19 outbreak has tested organizations’ resiliency to cybersecurity and ability to rapidly communicate with staff, which will be increasingly needed in a future with more digital working environment</li> <li>B. Retailers and manufacturers can prepare by increasing investment in cybersecurity, defining employee policies and trainings to reduce cybersecurity threats, and developing emergency notification and contingency systems</li> </ul> |
|--|---|---|--|

# HIGHLIGHTED CASE STUDIES

Case Study (CS) Module Legend:

- (E) Employees
- (D) Digital and online
- (S) In store
- (C) In communities

| Logo  | Name / Region  | CS Module   | Overview  | Contact  |
|---|--|---|---|--|
|    | <b>Alibaba</b><br>        |    | (E) (D) (S) (C)<br>Launch AI technologies and cloud-based solutions to support companies; app for medical personnel to share experiences through online messaging | <a href="#">Alizila Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum           |
|    | <b>JD.com</b><br>         |    | (E) (D) (S) (C)<br>Launch unmanned robot delivery fleet in Wuhan; allow receivers to collect packages using facial recognition                                    | <a href="#">KR Asia Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum           |
|    | <b>Aldi</b><br>           |   | (E) (D) (S) (C)<br>Automatic customer counting system at entrance to branches to maintain social distancing   | <a href="#">ESM Magazine Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum      |
|  | <b>ASDA</b><br>         |  | (E) (D) (S) (C)<br>Offer option to shop, pack, and pay in contactless manner with app on personal phone within the store  | <a href="#">ESM Magazine Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum      |
|  | <b>Amazon</b><br>       |  | (E) (D) (S) (C)<br>Alexa helps you diagnose COVID-19 using the voice assistant  | <a href="#">The Verge Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum         |
|  | <b>Albert Heijn</b><br> |  | (E) (D) (S) (C)<br>Uses AI to regulate the number of people in the store using an intelligent camera that follows entrances and exits                             | <a href="#">COVID Innovations Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |

Please view numerous additional case studies, submitted by CGF members, in the Case Study Library

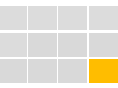
# LEARNINGS & NEW NORMAL FRAMEWORK OVERVIEW



|                          |                                       |                                       |                                    |  |
|--------------------------|---------------------------------------|---------------------------------------|------------------------------------|--|
| <b>1</b> Employees       | <b>A. DYNAMIC HR AND STAFFING</b><br> | <b>B. ADAPTIVE WORK</b><br>           | <b>C. HEALTH AND WELLBEING</b><br> | <b>D. SENSE OF PURPOSE</b><br>         |
| <b>2</b> Consumers       | <b>E. CATEGORY AND BRAND</b><br>      | <b>F. INCENTIVES</b><br>              | <b>G. CHANNELS</b><br>             | <b>H. COMMUNITY</b><br>                |
| <b>3</b> Business Models | <b>I. RESILIENCE MODELS</b><br>       | <b>J. ECOSYSTEM COLLABORATION</b><br> | <b>K. DATA AND ANALYTICS</b><br>   | <b>L. ALLIANCES / PARTNERSHIPS</b><br> |

*Looking for similar sections?*

- Filter to any module in the “Covid-19 Framework” filter on the GLM for other module summaries
- Search “**Learnings**” in the GLM for all module learnings summaries
- Search “**New Normal**” in the GLM for all module new normal summaries



# LEARNINGS SUMMARY OVERVIEW



## Challenges/ trends

### Maintaining Business Continuity (Short-term)

- Opportunity to address some short-term gaps with partnerships and alliances (e.g., staff shortage / absenteeism)
- Opportunity to share best practices and learnings with such an unprecedented event

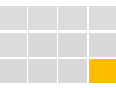
### Managing the Crisis (Medium-term)

- Formation of industry partnerships and alliances to best serve consumers, meet demand, and survive economic crisis
- Industry forums growing as retailers and manufacturers look for best practices
- New forums may emerge / existing ones become more important

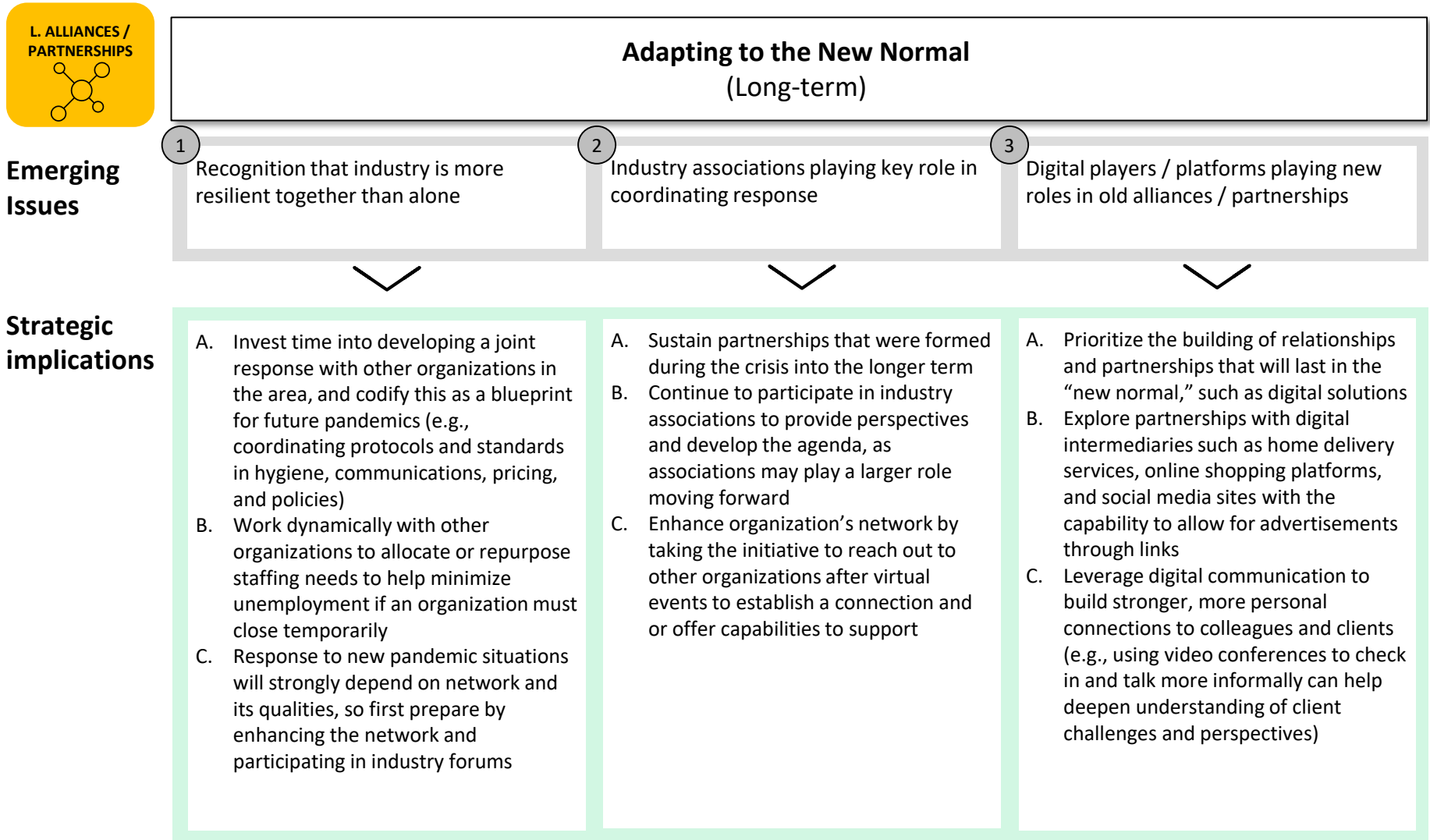
## Key learnings

- Utilize industry forums and experts for ideas on how to ensure business continuity (joint working / crisis committees)
- Look for immediate business partnerships in order to ensure business continuity (e.g., partner with food service companies to hire additional staff)
- Collaborate with national retail bodies to develop standards for in-store “social distancing” and personnel safety
- Take strict hygiene measures across all retailers and manufacturers, and develop joint strategy to serve the at-risk and limited mobility population

- Manage supply / demand by sharing pricing and stock data with other retailers to maximize product availability
- Take part in industry forums and groups in order to understand best practices across the industry
- Communicate with other organizations about logistics to ensure supply for population (e.g., while store closures may be inevitable, coordination is possible to have one retailer open per region)
- Participate in virtual events (e.g., webinars, video conferences) to learn about relevant topics and create new connections with other participants
- Explore joint ventures and deep collaboration, especially across smaller players (retailers and manufacturers)



# NEW NORMAL HIGHLIGHTED INSIGHTS





# HIGHLIGHTED CASE STUDIES

Case Study (CS) Module Legend:

- E Employees
- D Digital and online
- S In store
- C In communities

| Logo | Name / Region                    | CS Module   | Overview   | Contact   |
|------|----------------------------------|-------------|--|---|
|      | <b>Carrefour</b><br>             | <br>E D S C | Free hotline to smooth essential product donations to associations in need   | Contact Sharon Bligh at The Consumer Goods Forum  |
|      | <b>Ahold Delhaize</b><br>        | <br>E D S C | Using own network to put local farmers and food producers directly in contact with food banks and hunger relief organizations                        | <b>Imke Van Gasselt</b> , Director of Health  |
|      | <b>Unilever</b><br>              | <br>E D S C | Joined forces with businesses from aerospace, automotive, and medical sectors in a consortium to make ventilators for hospitals                      | <b>Thea Koning</b> , Corporate Affairs, Foods and Refreshment                                       |
|      | <b>Kroger</b><br>                | <br>E D S C | Retailers, food service, manufacturers, logistics/distribution centers look at how to establish safe work environments in 'Blueprint for Businesses' | <a href="#">Supermarket News Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum |
|      | <b>Johnson &amp; Johnson</b><br> | <br>E D S C | Expands existing partnership with Biomedical Advanced Research and Development Authority to seek treatment solutions                                 | <b>Donna Padovano</b> , Sr. Director Global Retail Health Innovation                                |
|      | <b>Coca Cola</b><br>             | <br>E D S C | Joined forces with other companies in "J'aime mon bistrot" to enable everyone to contribute to the support of their favored establishment            | <b>Wouter Vermeulen</b> , Senior Director, Public Policy  |
|      | <b>Spar</b><br>                  | <br>E D S C | Partnered with largest taxi company in Hungary (Fótaxi) to launch new home delivery service that is easy to use for vulnerable populations           | <a href="#">SPAR Article Link</a> , or contact Sharon Bligh at The Consumer Goods Forum             |

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