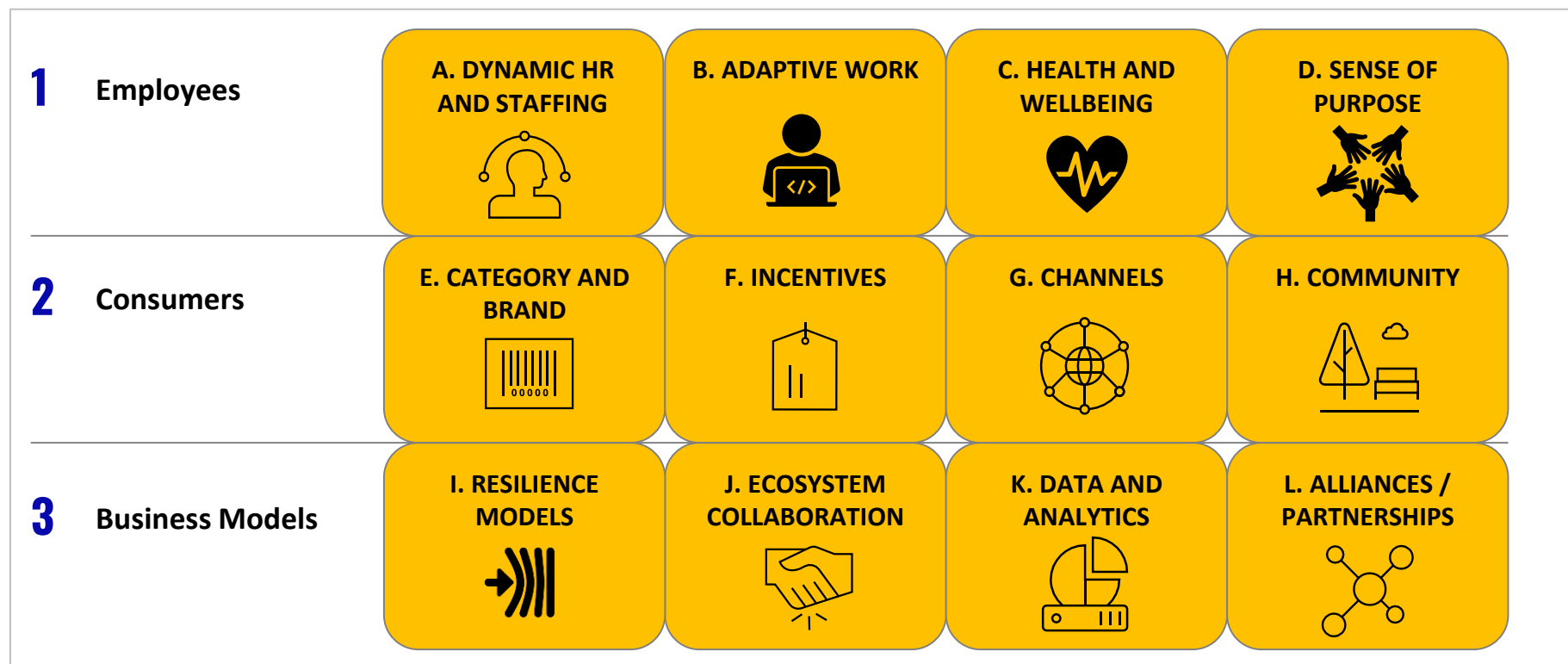
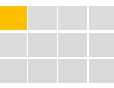


# NEW NORMAL FRAMEWORK OVERVIEW

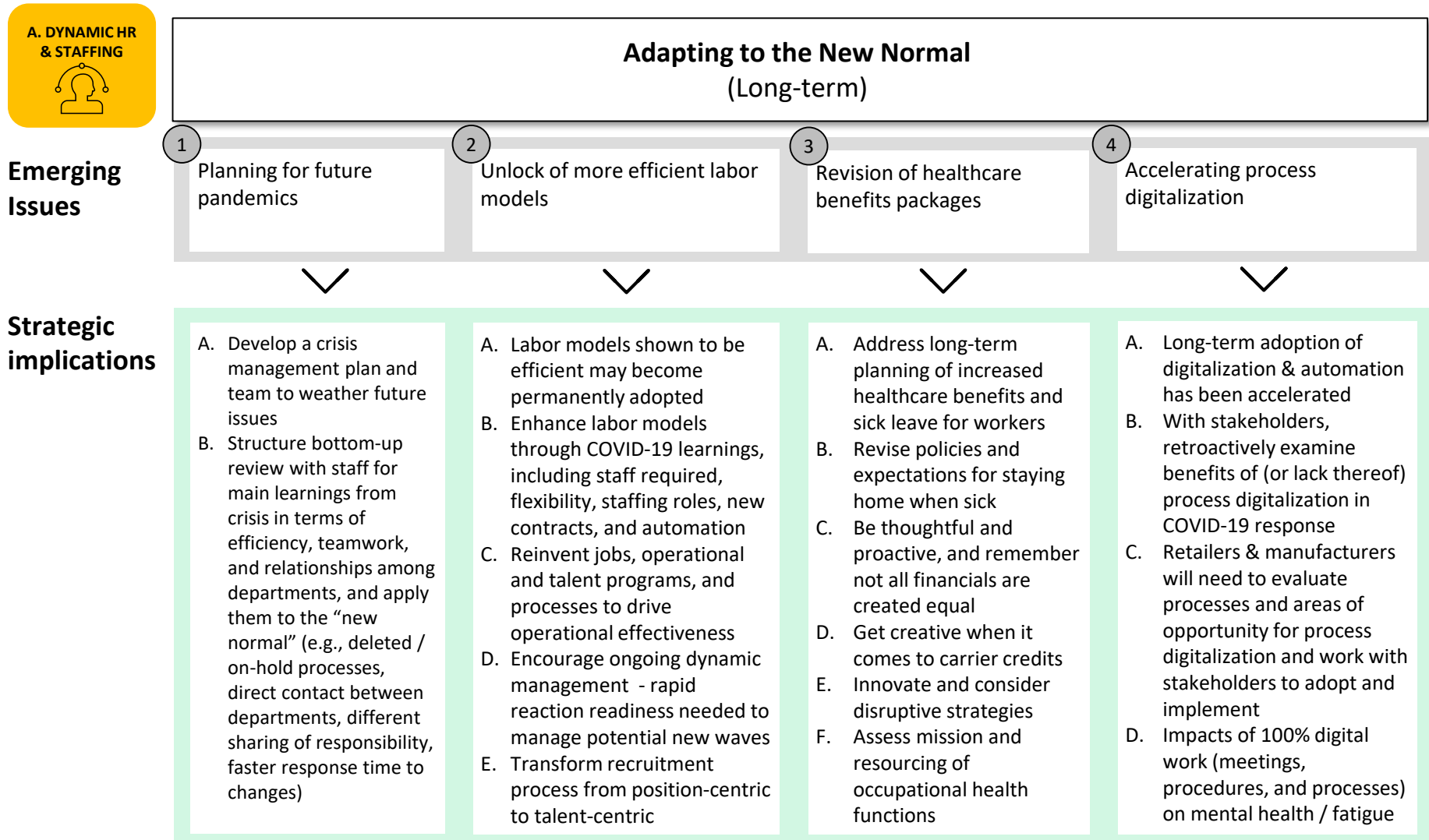


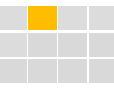
*Looking for similar sections?*

- 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



# NEW NORMAL HIGHLIGHTED INSIGHTS





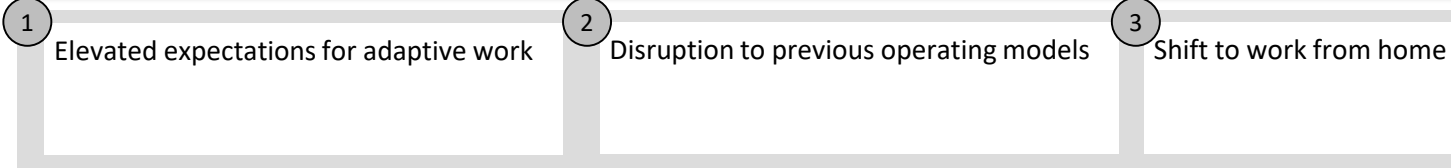
# NEW NORMAL HIGHLIGHTED INSIGHTS

## B. ADAPTIVE WORK



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

#### Emerging Issues

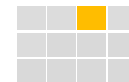


#### Strategic implications

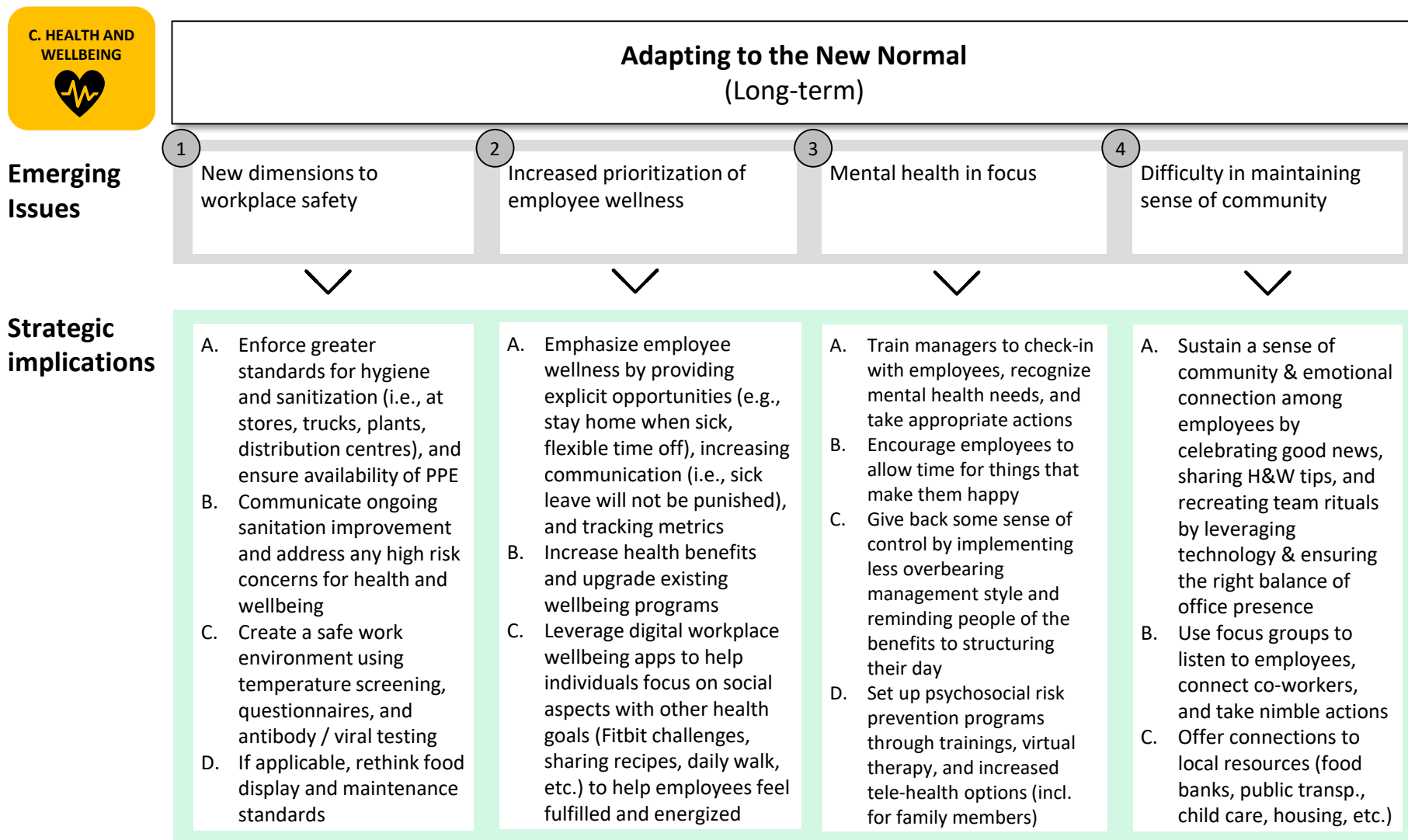
- A. Challenge current policies to include greater flexible working opportunities for mutually beneficial changes
- B. Define new workforce plans including flexibility to manage headcount
- C. Define the new employee experience / employee value proposition around future workforce segments
- D. Think about creative flexibility dimensions – varying shift work, job sharing, elastic workforce, cross-training, etc.
- E. Consider upstream and downstream impacts of making the job flexible, with legal impacts
- F. Ensure clear communication and formalization of new adaptive work policies so that employees understand impacts of job
- G. Create an experience that allows employees to live & work “in flow”

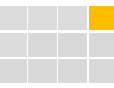
- A. Reorganize / reconfirm business as usual op model based on “New Normal” – temporary vs. permanent changes (e.g., process changes, roles, decision-rights)
- B. Rethink the organisation of people
- C. Define new leadership style & develop capabilities (delegated and semi-autonomous teams, “unbossed” style)
- D. Identify talent sources and acquisition processes; transform HR
- E. Reinforce new ways of working to sustain productivity (e.g., refreshed performance enablement)
- F. Provide ongoing “connective tissue” between leadership and frontline (e.g., new feedback processes, sense of belonging, impact on management and leadership styles)
- G. Co-create new ways of working with frontline employee input

- 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
- B. Plan for more video conferencing moving forward and ensure best practices for flexible working are communicated across organization (focus groups, feedback loops)
- C. Equip employees with what is needed for remote or virtual responsibilities
- D. Highlight complementarities between jobs that can be done at home and those that cannot
- E. When crisis subsides, ensure support to offer a balanced transition back to work

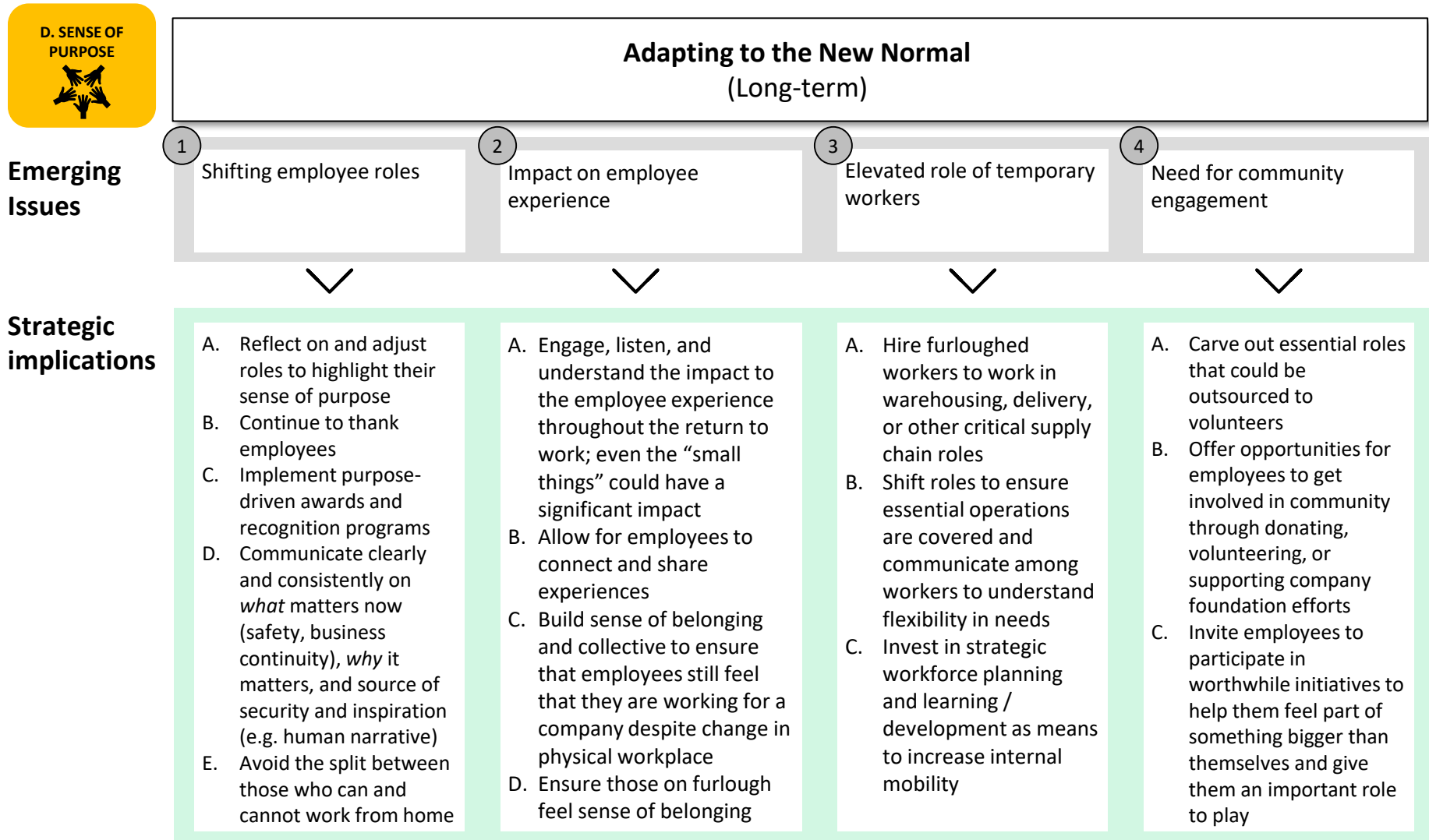


# NEW NORMAL HIGHLIGHTED INSIGHTS



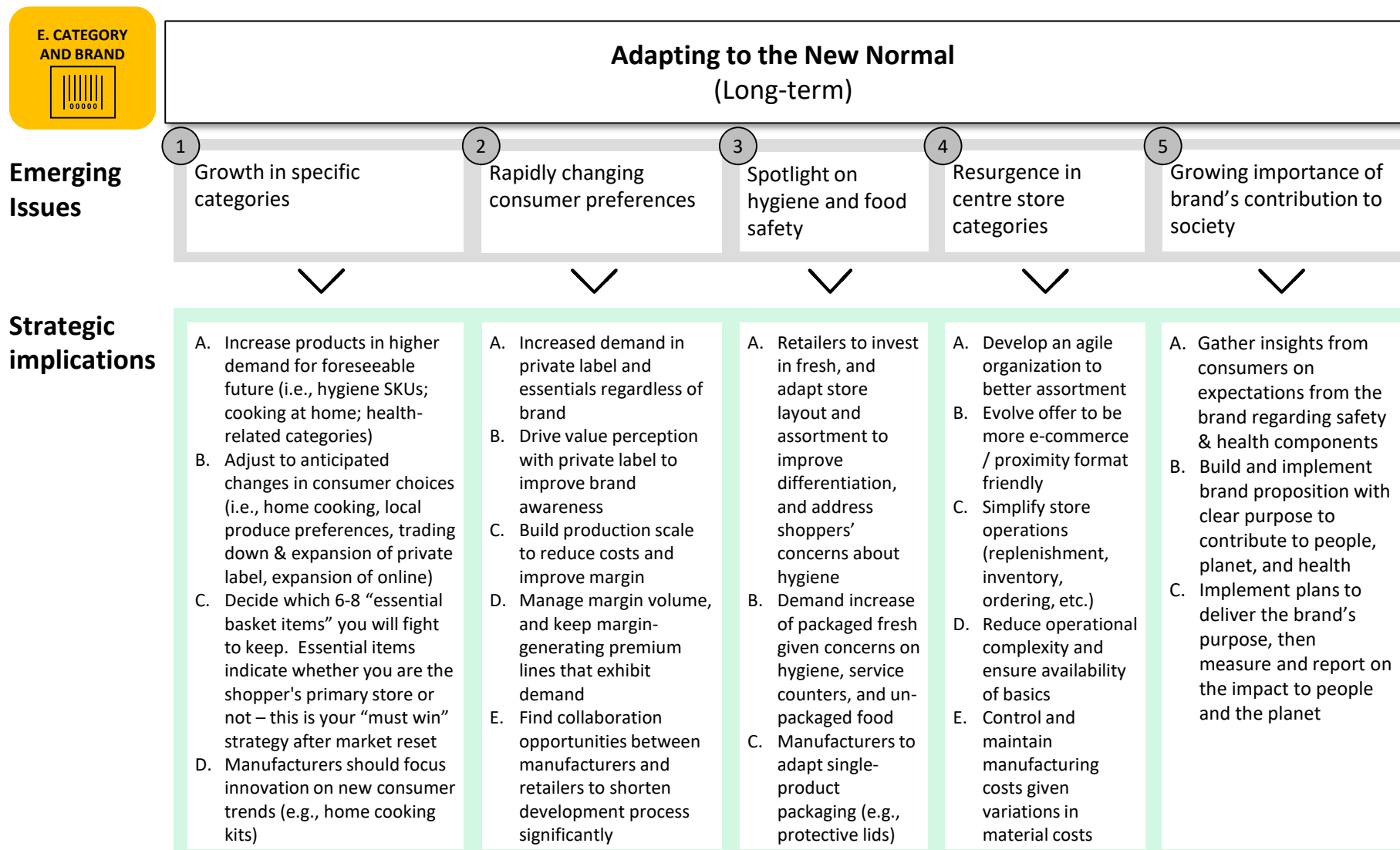


# NEW NORMAL HIGHLIGHTED INSIGHTS



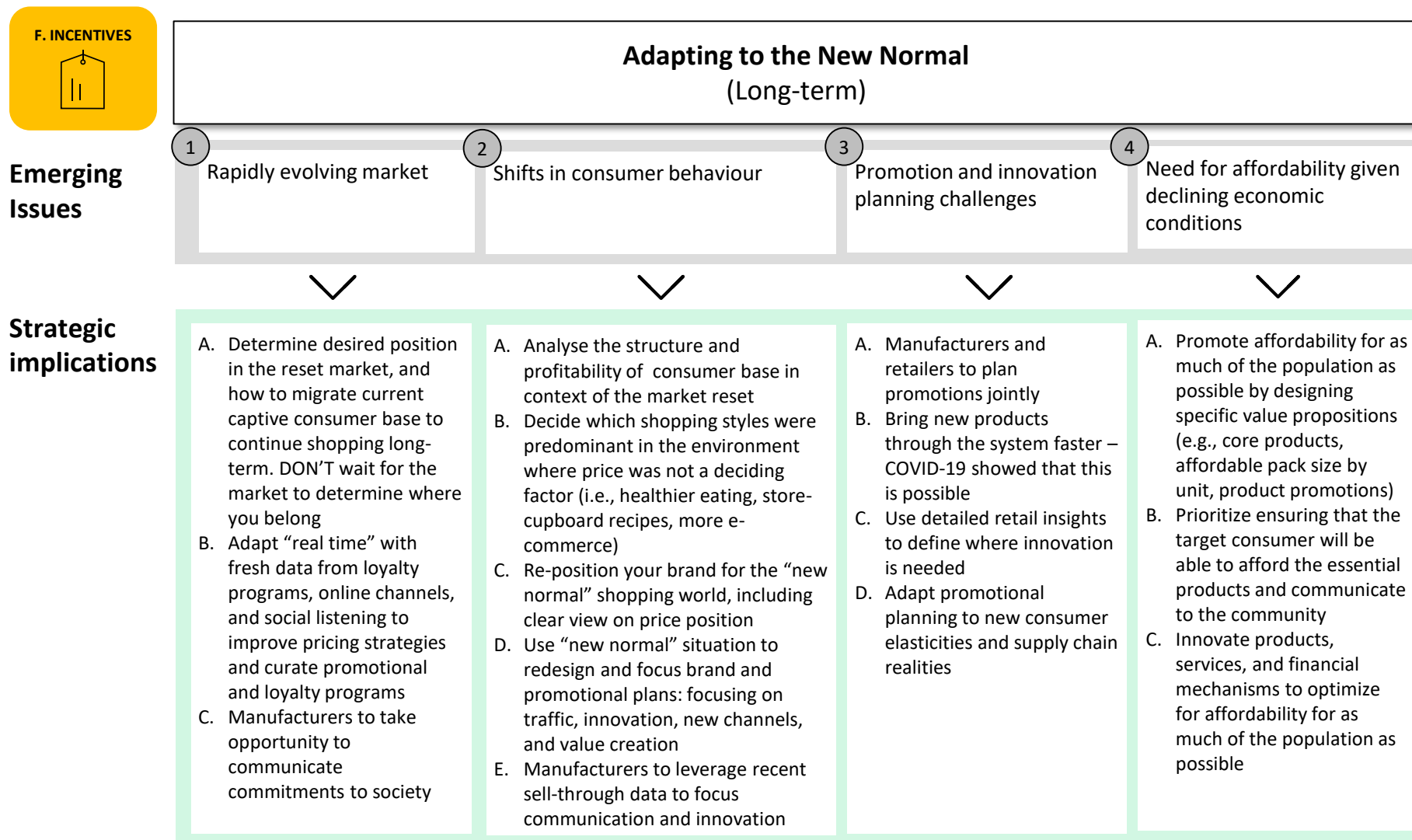


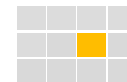
# NEW NORMAL HIGHLIGHTED INSIGHTS





# NEW NORMAL HIGHLIGHTED INSIGHTS





# NEW NORMAL HIGHLIGHTED INSIGHTS

## G. CHANNELS



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

#### Emerging Issues

1

Acceleration of e-commerce adoption

2

Shifting role for brick and mortar

3

Acceleration of in-store digitalization

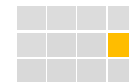
#### Strategic implications

- A. Invest to increase online and e-commerce capacities to cope with demand evolution
  - i. online penetration will continue to grow
  - ii. more automation and more staff required to take and fulfil operations
  - iii. need to ensure efficiency growth along with revenue growth / scale to ensure long-term viability of business
- B. Expect new channels and new intermediaries to take sales and profits away from mainstream retailers
- C. In select categories, manufacturers will add to competition by improving or kicking off their Direct To Consumer Models
- D. Retailers and manufacturers need to invest in or partner with “choice intermediaries” and delivery players and activities
- E. Retailers and manufacturers to accelerate cold chain network development, enhancing DCs and last-mile delivery capabilities
- F. Continued development of e-commerce, especially in development of DTC channels and platforms, as well as improvements in last-mile delivery (integration with B2C and B2B players to accelerate)
- G. Manufacturers to adapt sales force to decreasing demand in away-from-home channels

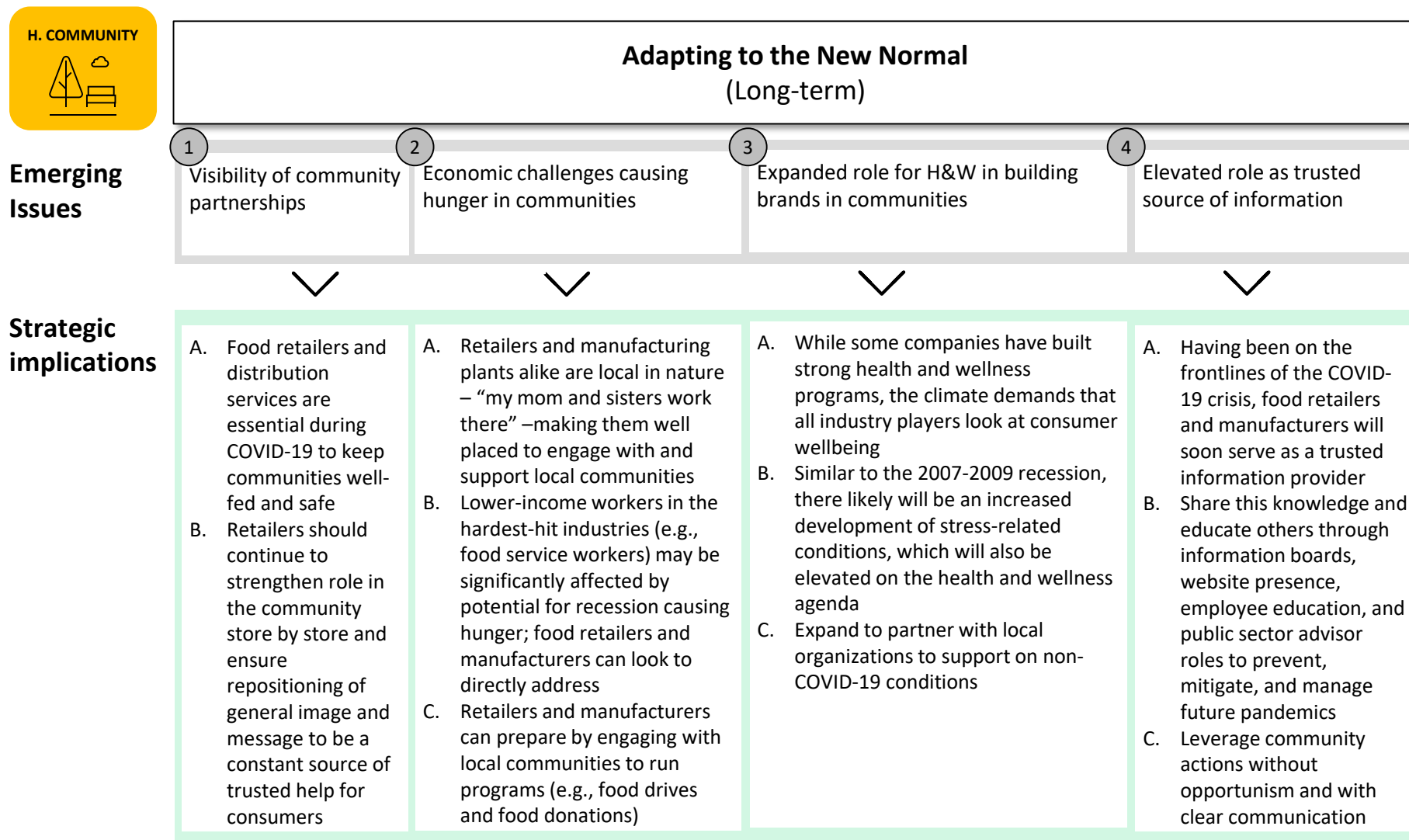
- A. Make permanent changes to the store footprint: remodel stores to better fit new planograms, permanently use store areas for online order prep, close or refocus underperforming stores
- B. Provide additional health protection for employees and consumers in long term procedures (e.g., client density, floor signs, how counters and eating areas are managed, replenishment while store is closed)
- C. Develop pandemic operations and “survival minimum” contingency plans for your channels
- D. Ensure best shopper experience with correct product assortment and physical in-store journey

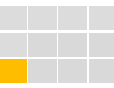
- A. Accelerate automation of in-store processes (e.g., self check outs, digital tags, self service counters), leveraging COVID-19 crisis experience, reducing costs, and adapting store procedures
- B. Manufacturers to support on digitalization of replenishment process



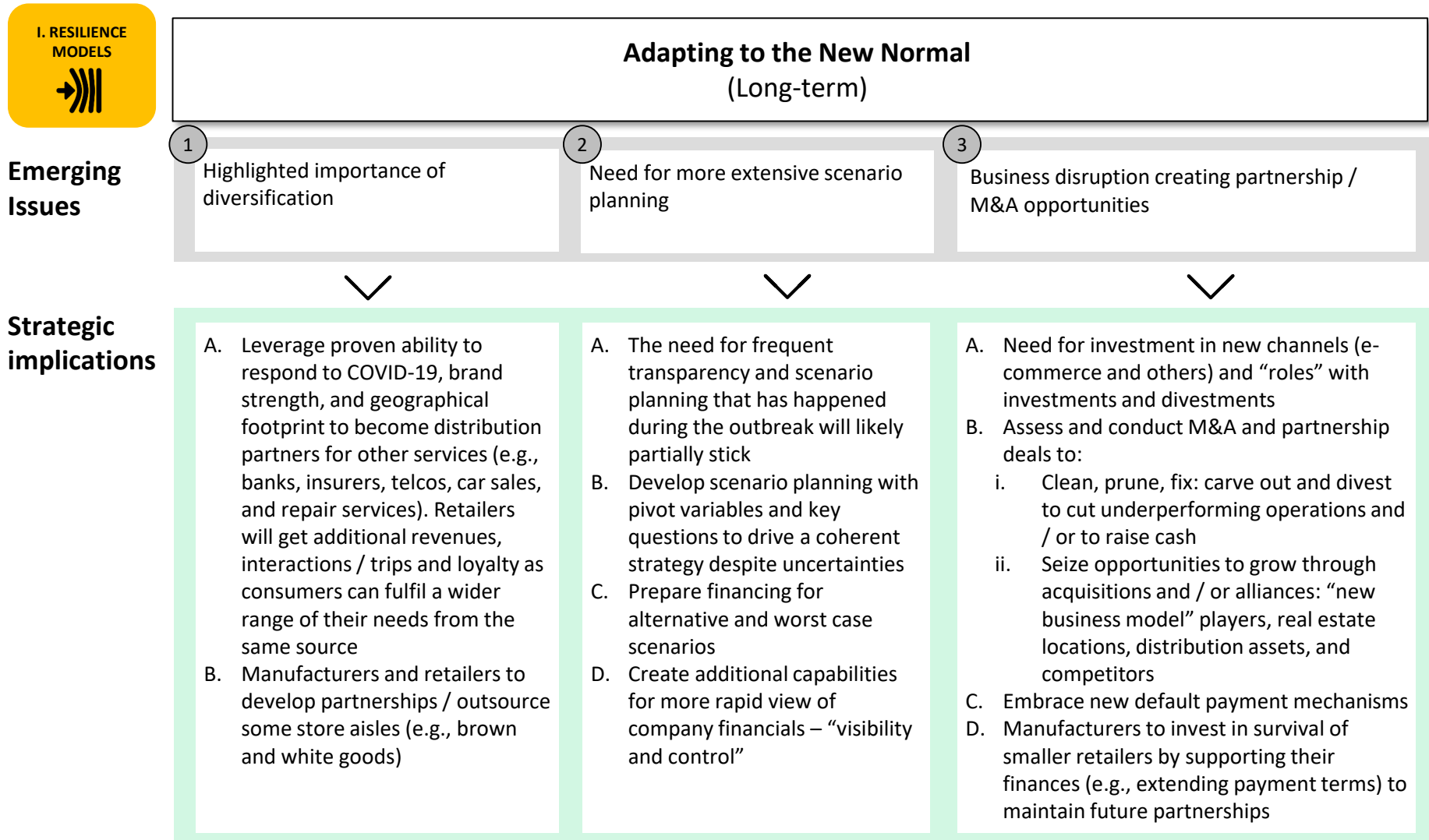


# NEW NORMAL HIGHLIGHTED INSIGHTS



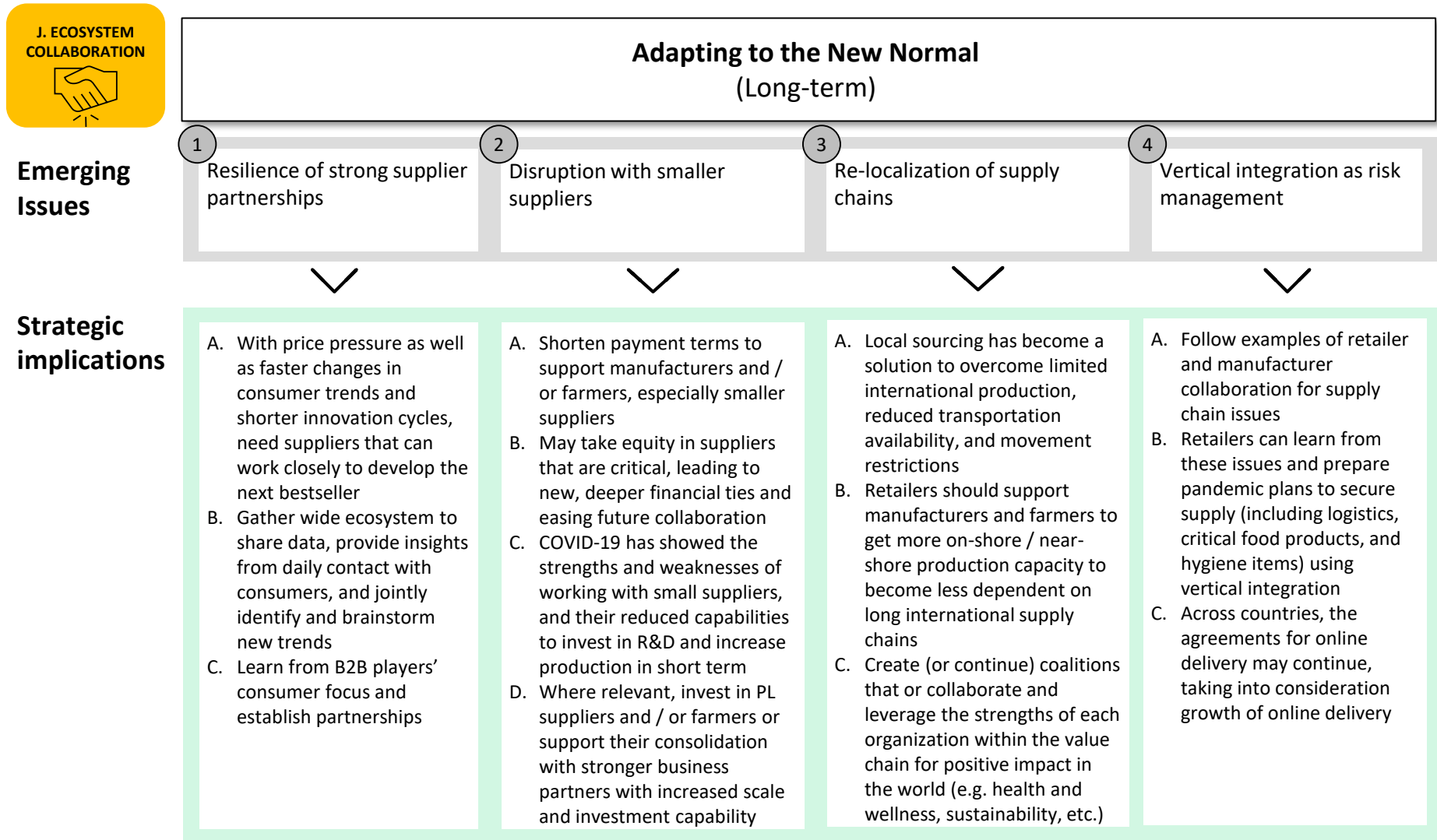


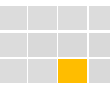
# NEW NORMAL HIGHLIGHTED INSIGHTS





# NEW NORMAL HIGHLIGHTED INSIGHTS





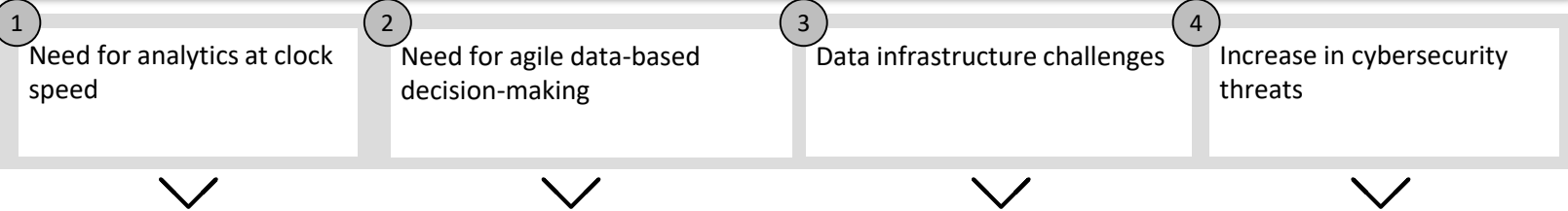
# NEW NORMAL HIGHLIGHTED INSIGHTS

## K. DATA AND ANALYTICS



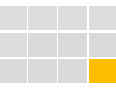
### Emerging Issues

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



### Strategic implications

- |   |  |  |   |
|---|--|--|---|
| <p>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</p> <p>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</p> | <p>A. Better understanding of consumer needs and market trends has to be complemented with a faster reaction</p> <p>B. Perform faster and more accurate decision making, leveraging:</p> <ol style="list-style-type: none"> <li>Relevant metrics, tools, and processes to analyze / get insights</li> <li>Real time notifications to decision-makers to take responsibility for launching actions</li> </ol> <p>C. Collaborate on data to maximize sales and improve supply chain efficiency</p> | <p>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</p> <p>B. Retailers and manufacturers need to significantly increase e-commerce and omnichannel-related investment, both for production and management</p> <p>C. Need for systems that allow for vertical or horizontal diversification and extensions</p> <p>D. Enhance data insights and capability to decipher and predict consumer movement and competitive action</p> | <p>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</p> <p>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</p> |
|---|--|--|---|



# NEW NORMAL HIGHLIGHTED INSIGHTS

