maplewave

The 11 Solutions Telcos Need To Survive COVID-19

Executive Summary

Across the world, every industry has felt the effects of COVID-19 in some way, and telco is no exception. Demand for services has never been higher, but physical distancing and gathering limits have caused many telco stores to reduce service or temporarily close altogether.

This is not a short-term challenge; this pandemic will wax and wane over many phases. Telcos will need to endure a cycle of store lockdowns and re-openings until a vaccine becomes widely available.

While stores are important, telcos must think beyond physical retail to find new ways to serve their customers. As we've seen from the early days of this pandemic, those who have invested in digital platform solutions are successfully serving customers across many channels, while more traditional retailers have been left in a precarious place.

To thrive during this pandemic (and beyond), telcos need to adapt their retail strategies and quickly implement solutions that will enable digital experiences while taking measures to safely re-open their stores.

In this whitepaper, we will examine:

- How the current situation has impacted telcos, changed consumer behaviour and forced new best practices to emerge.

- 11 tangible solutions that can solve your immediate COVID-19 pain points.

- How omnichannel solutions can help you thrive now – and in the long term.

01

Retail's New Normal

02

11 Ways To Serve Customers During COVID-19

03

Thriving Long-Term

04

Conclusion

01 Retail's New Normal

Retail success is synonymous with a busy store. But what happens when customers can't or won't come to you?

Telco's Difficult Position

With few exceptions, retail-based businesses have been hardest hit by COVID-19. Strict gathering limits and physical distancing have caused many businesses to abruptly close their storefronts and furlough their staff.

This pandemic has not affected all telcos equally. Some are still waiting for their region's peak, while others are in countries that have started re-opening their economies.

Regardless of the circumstances, the battle is not over. This pandemic is expected to wax and wane over many phases, with **another wave** expected to coincide with the late 2020 flu season. Telcos will need to endure a cycle of store lockdowns and re-openings until a vaccine becomes widely available.

Telcos are in a particularly precarious position. Their network operations are an essential service in most countries, and yet their profitable retail stores have had to reduce service levels or temporarily shut down, cutting off this important income stream.

With many people now working/staying at home, demand for telco services has never been higher. In May 2020, **Three UK** revealed they have seen **an 8% increase in call volumes and 12% increase in data usage,** forcing them to focus exclusively on maintaining the resilience of their network.

Other operators are also struggling with the retail side of their business and have reported declining profits in early 2020:

- In France, **Orange** has **cut their dividend** down from €0.70 to €0.50, in response to COVID-19 financial pressures.

- Canadian-based telco **Bell**'s net **earnings are down 7.3%** from $791 million a year ago to $733 million in 2020.

- **Telefonica**, the Spanish telecommunications company, reported a **quarterly net profit** of 406 million euros vs 926 million euros in Q1 of 2019.

Retail stores are still important, and telcos must find ways to operate them safely when they can re-open. But its also clear that telcos must think beyond physical retailing to find ways to serve their customers through digital channels.

Digital solutions help telcos serve customers in new ways, such as through e-commerce, curbside pickup, self-service apps, etc. To be successful, telcos need to accelerate their digital transformations and implement solutions that facilitate transactions in channels beyond the store environment.

Time is of the essence. With a second wave of COVID-19 predicted to follow closely behind the first, telcos have a small window to implement new ways of doing business. That said, poor execution is just as detrimental as not having digital solutions at all, as customers will only tolerate sub-par experiences for so long.

The stakes are high; telcos must get this right the first time.

Evolving Customer Behaviour

This pandemic isn't just affecting businesses - it's also changing customers' spending priorities and shopping habits.

Spending Priorities

For many people, 2020 has brought a lot of uncertainty. The UK is in the midst of its first recession in a decade, with **the economy projected to shrink by 14%**. And in the United States, **the unemployment rate has risen to over 15%** in a two-month period.

Despite this, every consumer hasn't been affected equally. Furloughed consumers have reduced their discretionary spending, but many have continued to work throughout the pandemic as normal.

This has changed spending behaviours on both sides, which ranges dramatically from tightened budgets all the way up to increased discretionary spending due to redirected funds from travel, entertainment, etc.

Regardless of budget, what we spend money on has also changed. US tax firm, Avalara, reports that products that help consumers adjust to life at home, such as fitness, home learning, and hobby supplies, have seen **over a 100% increase in sales**. Three UK's **increase in network traffic** shows telco services are also in-demand at this time.

Telcos should expect their customers' spending behaviour to change. Some can now splurge on that high-end device, while the cost-conscious may favour economic models or repairs vs upgrades. Across the board, work-life changes will increase demand for service upgrades, even for those with reduced budgets.

Telcos should prepare for uncertainty and promote a wide range of devices and plans at different price points. They should also initiate broad marketing campaigns to push plan and device upgrades while their customers have extra discretionary spending or increased service needs.

The Rise of E-Commerce

Although spending habits have changed, the need to obtain goods and services has not gone away. A 'quick trip to the store' is now a risky exercise. Consumers are increasingly turning to digital channels as a low-risk way to conduct their shopping.

Throughout the pandemic, customers have been hesitant to visit brick and mortar stores. Even before official lockdowns took effect, 75-85% of US shoppers were **avoiding non-essential retail store visits.**

Not surprisingly, e-commerce has seen a complementary explosion in popularity. Forbes reports that many online retail categories have seen a **74% increase in sales** in March versus 2018 levels.

E-commerce's reach is also expanding into new categories. According to research firm Numerator, almost **three in 10 people** are shopping online for items they would have normally bought in-store.

This change in shopping methods isn't just a temporary blip. Even digital latecomers are seeing the benefits of e-commerce. For example, China has seen a 55% increase in consumers who intend to **permanently shift to online grocery shopping.**

Long after the pandemic is over, one thing is clear - the increased demand for digital channels will be here forever. Telcos need to invest in digital channels so they can offer their customers an omnichannel experience.

Attitudes Towards Stores

While online shopping is king right now, this doesn't mean retail stores are going to disappear - they will just look different than they used to.

The biggest and most immediate change will be the implementation of safety measures. 95% of consumers want companies to **implement physical protection and distancing measures** to help keep them healthy. This will require major adjustments to store designs and policies, which will be needed until a vaccine is available. We have outlined how to do this later in this guide.

In the longer term, will stores still be necessary? This question has been asked for years, long before COVID-19 was on the radar. The answer is still the same – although stores will be different, don't expect them to disappear anytime soon.

The biggest reason to visit a store is to get something that can't yet be replicated online – an interactive, human experience. In an article by **Retail Dive**, Columbus Consulting's Daniel Binder reinforced the idea that although there may be some temporary avoidance of stores, millennial consumers will **still demand the in-store experience** going forward. In fact, we expect many will flock to stores in search of that human connection they missed during lockdown.

At the same time, the role of the store is also changing. Stores were already evolving to become an experience-focused touchpoint within the wider omnichannel universe; this pandemic has just accelerated this change. We are seeing this in action right now as many retailers pivot to use their stores to enable strategies like curbside pickup and click & collect.

Telcos need to revamp their stores to enable "touchless" experiences and payments, sanitizing stations, and supportive operational procedures. They also need to envision how their stores will function within the wider omnichannel ecosystem and implement technologies to bring new customer journeys to life.

75-85% of US shoppers avoided non-essential retail store visits, even before widespread lockdowns were in place

– Total Retail

02 11 Ways To Serve Customers During COVID-19

Use these 11 strategies to serve your customers in any location, at any time.

Telcos must find ways to safely serve customers using both physical and digital channels. This chapter outlines 11 innovative strategies that telcos can use to accomplish this.

Serving Customers While Stores Are Closed

The following strategies can be used to serve customers while retail locations are shut down. These low-contact shopping options remain valuable once stores re-open as they can be used to reduce store traffic.

1. Curbside Pickup / Click & Collect

	Low		
Effort	⚙ ○		
Cost	$ ○		
Time Frame	🕐 ○		
	Immediate		
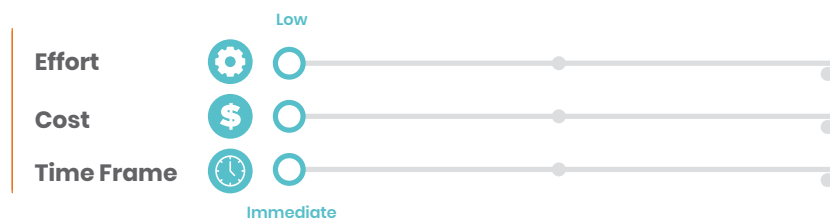
Background:

Curbside pickup is everywhere lately, and for good reason. A variation of the 'Buy Online Purchase In Store' journey, customers initiate a purchase online, then collect it from a store or have it brought to their vehicle. This strategy blends the convenience of online shopping with the immediacy of same-day pickup.

In the Canadian province of Ontario, non-essential businesses were forced to close during the height of the pandemic. Once cases plateaued in late spring 2020, curbside pickup became a government-sanctioned way for businesses to **begin serving customers**, and was a key tactic for gradually reopening the economy.

This option has become so popular that some businesses are struggling to keep up with demand. Many started implementing **fixed appointment times** to help spread traffic out throughout the day.

According to Adobe Analytics **data**, BOPIS orders — which include curbside pickup — **increased 87%** year over year from late February to March 29, 2020.

This is a relatively easy pivot for most telcos. If your commerce system can pause and resume orders, this strategy is quick to implement.

Doing It Well:

- ✓ Ensure your point of sale can create then pause an order and finalize it upon pickup.

- ✓ Create designated in-store/parking lot areas for click & collect and curbside pickups. Ensure pickup points are clearly marked.

- ✓ Determine how customers will notify that they've arrived – will they call or text, or will a staff member personally greet them to take their order number?

- ✓ Heavily promote/advertise the service.

- ✓ Ensure curbside/in-store pickup are available collection options through your e-commerce site.

- ✓ If faced with heavy demand, implement appointment scheduling so customers can choose time slots in advance.

- ✓ Communicate key information via notifications. These should indicate when the order's ready, the order number, store hours, pickup instructions, etc. Depending on your process, a series of notifications may be needed.

- ✓ Establish approved payment methods. Online or tap payments are preferred; cash handling is now risky. Update communications accordingly.

- ✓ Give customers the ability to modify their order / contact someone about it. Ensure appropriate staffing levels to handle these requests.

- ✓ Train your staff on these new processes to ensure everyone is on the same page.

- ✓ Consider traffic control measures – a staff member may need to direct traffic/lineups.

- ✓ Have a contingency plan if things go wrong (e.g. delays, lost items, and other customer inconveniences). Consider offering vouchers or discounts to preserve customer loyalty.

- ✓ These strategies have big implications for purchasing, inventory levels and supply chain - ensure your supply chain is up to the task. Select an inventory management system with good stock management controls, systems and processes.

2. Door-to-Door Sales/Service

Low

Effect	⚙ ⚪ —————————●——————
Cost	💲 ⚪ ———————————●————
Time Frame	🕐 ⚪ ————————————●———

Immediate

Background:

Door-to-door sales may seem like a relic from the past, but in many developing countries, door-to-door and field sales are still regular practice. In these places, small sales teams travel to customers' doorsteps to processes basic transactions, which can include bill payments, top ups, prepaid SIM sales, fixed line transactions, etc.

During this pandemic, we are seeing a resurgence of door-to-door service in tier 1 markets. For example, **Rogers** is offering their new **Pro On-the-Go** service in select urban markets in Canada. This is a great example of how a basic concept becomes innovative through the use of digital tools.

Pro On-the-Go brings the store experience to the customer's doorstep. Customers select a device online, then a Rogers rep delivers the device to their home or workplace within a few hours. The representative then helps the customer set up their device over the phone or by using video chat. All agreements and receipts are delivered electronically.

Nova Scotia-based telco, **Eastlink,** is using the door-to-door model a bit differently, instead offering **home service calls** with remote support. This is another great example of how this strategy can be used creatively to serve customers.

Doing It Well:

✓ Required equipment includes a laptop, internet hotspot, mobile point of sale, and a digital contract/ remote signing solution that's capable of capturing signatures and ID information.

✓ Heavily promote/advertise the service.

✓ Ensure home delivery is available as a collection option through your e-commerce site.

✓ Determine how deliveries will be made. Will you use corporate vehicles or reimburse staff for their mileage? Regardless, ensure your delivery vehicles are branded.

✓ Determine if doorstep service is a viable option for your market.

3. Outbound Marketing Campaigns

	Low	
Effort		
Cost		
Time Frame		
	Immediate	
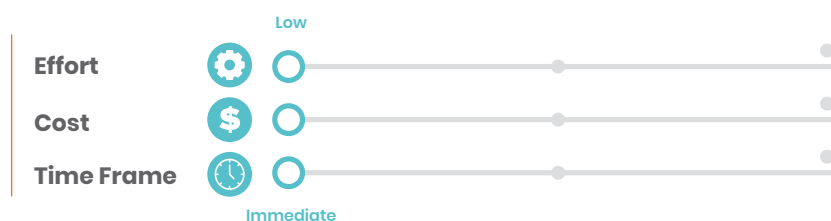
Background:

Now that fewer customers are visiting their stores, telcos are missing out on these key interactions that often lead to new sales. During COVID-19, outbound marketing campaigns are a crucial way to initiate conversations and upsells.

The timing for this strategy couldn't be better. Telco services have been in high demand lately. With many staying and working from home, customers are spending **way more time on their devices**. Many are becoming painfully aware of their device and plan limitations.

Whether they're running out of data, encountering a lack of storage or battery life, or wishing they had certain features, we predict customers will have a significant appetite for device upgrades and plan changes.

Outbound marketing campaigns are the perfect way for telcos to reach their customers at home to keep their sales efforts going. But todays' customers won't accept any generic offer. According to a Salesforce study, 51% of consumers **expect companies to anticipate their needs** and make relevant suggestions before they even make contact.

By pairing marketing efforts with customers' sales data, telcos can create targeted offers based on the customer's usage and upgrade cycle.

Marketing activities are also a great way to engage retail store staff during slow periods. Advisors can build customer lists and contact customers about new offers and promotions.

Doing It Well:

✓ Collect usage and upgrade cycle information from your commerce and billing platforms.

✓ Partner with the right outbound marketing firm, or re-assign underutilized staff.

✓ Determine how offers will be sent (email, push notifications, phone calls).

✓ Create a follow up schedule.

4. Kiosk Vending & Collection Lockers

		Medium
Effort	⚙	
Cost	$	
Time Frame	🕐	
		Medium

Background:

Kiosks are a great tool that can divert traffic within a telco store or extend services into a new environment altogether.

There are many types of kiosks. Basic units can be used to support simple transactions, like bill payments and top ups. More complex kiosks can replicate the store experience by vending devices and SIM cards. Some kiosks can even be paired with collection lockers to facilitate in-store contactless pickups.

With strong appetites for low-contact interactions, kiosks are a potential tool that telcos can use during this pandemic as long as they're used in the right way.

As kiosk screens are considered high-touch surfaces, regular cleaning procedures, hand sanitizing stations and disinfecting wipes would need to be implemented to bolster customer confidence.

If cost-cutting measures are needed, kiosks with comprehensive vending options can even be used to replace smaller stores.

By partnering with the right provider, kiosks can be quickly deployed within a few months, making this a particularly attractive option during this pandemic.

Doing It Well:

✓ Select the right kiosk solution – telcos should select a kiosk that supports telco transactions, accepts the appropriate payment options, offers a good user experience, and a range of hardware and support options.

✓ Establish a regular cleaning schedule and ensure disinfecting wipes and hand sanitizing stations are available and continually stocked.

✓ Promote your kiosk locations, their benefits, and safety protocols.

✓ If the kiosk is within the store environment, train your staff on how and when to direct customers to the kiosk, as well as how to provide support from a safe distance.

✓ Ensure instructions are posted around sanitation practices (e.g. using hand sanitizer/disinfectant before use). While physical signs could be used, incorporating on-screen instructions into the user interface would create a more seamless experience.

5. Self-Service Apps

Medium

Effort	⚙	●———————○————————○
Cost	$	●———————○————————○
Time Frame	🕐	●———————○————————○

Medium

Background:

Self-service apps have become more common over the last few years. These apps are a great way for customers to manage their telco services from their device, eliminating the need for an in-store visit.

App capability varies, but common functionality includes the ability to pay bills, change plans, order devices/accessories, get support, book appointments, view offers, etc.

VEON and **Omantel** are two carriers who are successfully serving customers using self-care apps:

- VEON has more than **20 million users of self-care apps**, and demand has never been higher; an additional 240,000 Russian subscribers downloaded their self-care app in April 2020.

- Omantel has **revamped its self-service apps** to use face and fingerprint recognition so customers can securely apply for home internet, wireless plans, and activate eSIMs.

Self-service apps will be crucial to controlling customer flow as stores re-open. Many customers visit retail stores to pay their bills. With occupancy restrictions in place, customers can pay their bills through an app, rather than being turned away by an at-capacity store. The ability to book appointments will also be crucial, as this will further spread out customer traffic throughout the day.

Doing It Well:

- ✓ Select the right solution – best-in-class apps support a wide range of functionality and marketing activities, are easy to use, and integrate with the rest of your systems to enable a seamless experience.

- ✓ We recommend against trying to make your own self-care app in-house; existing telco-specific apps are significantly less expensive and can be deployed more quickly.

- ✓ Heavily promote the app's availability, benefits, and download/usage instructions.

- ✓ Ensure all staff know how to recommend the app to new users e.g. "next time, you could do this from home without requiring a store visit".

- ✓ To confirm staff are promoting the app, set KPIs for store and contact centre staff based on the number of downloads they initiate.

Adapting When Stores Can Open

The following strategies can be used to ensure store environments are safe for customers and staff alike when retail locations are able to open.

Around the world, local governments are providing guidelines and recommendations for safe re-openings. The Government of Canada has provided an **excellent set of guidelines** for retail businesses around store sanitation, staff management, and store policies. Be sure to also refer to your country's legislation.

6. Store Operations

|		Low	
Effort	⚙	○————————○————————————○	
Cost	$	○————————○————————————○	
Time Frame	🕐	○————————○————————————○	
		Immediate	

Background:

As retail stores begin to re-open, it won't be business as usual. Store operations and policies must be updated in line with new realities to keep workers and customers safe.

Doing It Well:

✓ Educate staff on how the virus spreads and how they can protect themselves.

✓ Obtain appropriate personal protective equipment (masks, gloves, shields) and cleaning supplies. Ensure staff are trained on their proper use.

✓ Create store cleaning procedures with a focus on high-touch areas (doorknobs, counters, railings), as well as communal areas (bathrooms and breakrooms). Be sure staff know how to safely clean the store.

✓ Reduce store hours to allow for deep cleaning.

✓ Stagger breaks to minimize staff gatherings.

✓ Establish procedures for how employees report to work. Fitness can be evaluated by self-reporting, temperature checks, etc. Privacy legislation deems what's allowed and differs by country. Be sure to check your local regulations.

✓ Update sick policies to facilitate 14-day isolation requirements. Implement paid sick time to ensure compliance, or educate employees how they can access government support, if applicable.

✓ Communicate new store policies to customers (via email, push notifications, posting to front doors, etc.).

✓ Create "mini teams" of staff members that always work the same shifts together. If a team member gets sick, or an exposure occurs, another team can fill in while the original group is quarantined. This will ensure the store always has adequate coverage.

7. Store Layout Adjustments

|		High
Effort	⚙	○
Cost	$	○
Time Frame	🕐 ○	

Immediate
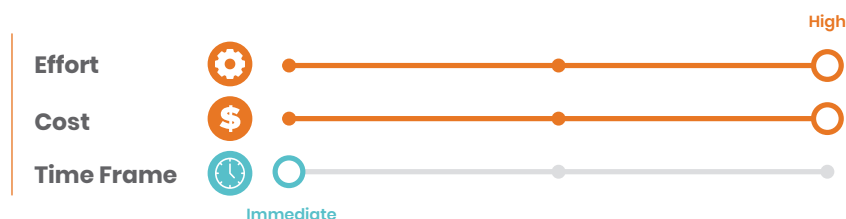
Background:

Well-designed telco stores prioritize free-movements, interactive experiences, and close interactions. To operate safely, telcos must tweak their floorplans and store layouts to protect the health of their staff and customers.

Doing It Well:

✓ Increase the space between fixed tills to meet the 2m/6ft distancing guideline. Some tills may need to be removed or blocked to achieve this.

✓ Replace "push/pull" doors with automatic ones, or permanently prop them open if weather allows.

✓ For stores with two doors, designate one for entry and one for exit. Stores that have large open storefronts, like those in malls, can use physical barriers and signage to create in/out doorways.

✓ Install temporary floor markings to coordinate the flow of traffic through the store and eliminate bottlenecks. Ensure lineups have marked standing points every 2m/6ft to promote physical distancing.

✓ Install plexiglass barriers at tills for enhanced staff safety.

✓ Install sanitizing stations at appropriate areas, such as entrances/exits, high-touch areas, etc.

✓ Install PIN pads capable of taking contactless payments; as a best practice, stores shouldn't accept cash if possible.

✓ Eliminate background music – less noise means staff and customers can stand further apart and still hear each other.

✓ Increase ventilation throughout the store to improve air quality and reduce the chance of any infections spreading.

✓ Depending on the country, some telcos may need to completely remove demo devices from their stores. If displays are allowed in certain markets, all devices must be sanitized after each customer.

8. Control Store Traffic

		Low		
Effort	⚙	○——————————○——————————○		
Cost	$	●—————————————————●—————————○ Medium		
Time Frame	🕐	○——————————○——————————○		

Immediate
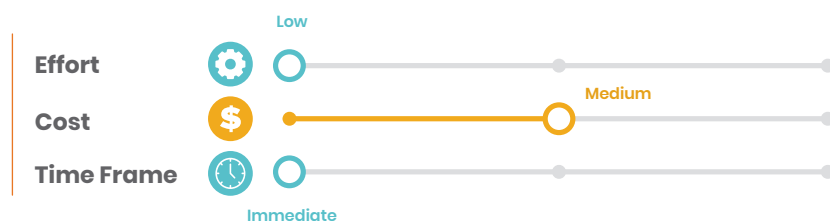
Background:

Limits on the size of allowed gatherings are expected to be in place until a vaccine is developed, which could be years away. Until that happens, telcos will need ways to restrict the number of customers in-store.

Telcos must also consider how to reduce the number of customers waiting outside of their stores. Unlike big box retailers that have the physical space to accommodate large lineups, most telco stores are small and have limited places for customers to safely queue.

Customer control and footfall solutions are essential tools for managing store traffic.

Customer control solutions simultaneously manage appointments and walk-in traffic, so customer traffic is spread out throughout the day. Best-in-class solutions eliminate lineups altogether by sending notifications to the customer when it's safe to enter the store.

Footfall tracking solutions monitor traffic and indicate when the store is safe to enter, as well as when maximum occupancy has been reached, via digital screens. These solutions can also track the customer to staff ratio to limit each staff member's interactions throughout the day.

Doing It Well:

✓ Invest in a made-for-telco customer control solution that can simultaneously manage appointments and eliminate lineups.

✓ Implement a footfall solution that can track store traffic and display occupancy levels in real-time.

✓ Place a greeter at the front of the store to manage and direct walk-in traffic.

✓ Promote these services to customers and communicate new store procedures.

✓ Only allow the subscriber to visit the store – no family or friends should accompany them.

✓ Train staff on new systems and procedures.

9. Staff-Less Store

			High
Effort			
Cost			
Time Frame			Long

Background:

Looking to the future, one strategy might become more pervasive: the staff-less store. Although this is not a common strategy yet, these self-service experiential stores are already popping up in advanced, highly urban markets.

In Singapore, the **Unboxed by Singtel** store is a great example. This store uses robots, video self-service, vending machines, and collection lockers to serve customers without staff assistance.

While this example won't apply to every market yet, as e-SIMs and wearables become common, this store type may make sense for more traditional markets.

Doing It Well:

✓ Store design is key to the success of this model. Telcos must select the right store design/solution provider.

✓ Although these stores aren't staffed, they still require a human presence; regular cleaning, hand sanitizing stations and occupancy controls would be imperative for this type of model to be viable.

✓ Although this store type won't be well received in every market, it may become more viable in a few years. These projects take time to implement, so it is worth considering now.

Optimizing Your Business Operations

The following strategies can be used to optimize your business operations and ensure continued profitability and strength of your supply chain.

10. Evaluate and Right-Size Your Estate

|		Medium	
Effort			
Cost	Low		
Time Frame			
Immediate			
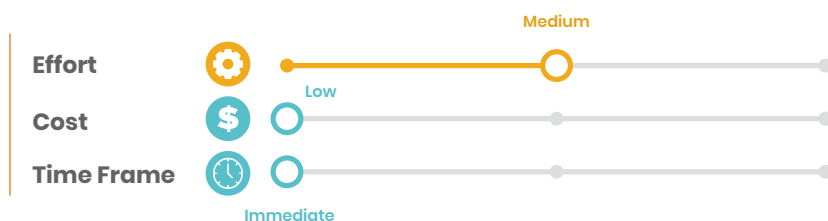
Background:

This pandemic is the perfect time to evaluate staff and store performance to determine which locations are underperforming, and which are under or over-resourced.

It's also valuable to evaluate which areas are over/underserved versus your competitors to ensure appropriate store coverage once things return to normal.

Taken together, these exercises can help telcos pinpoint which stores should be closed, which areas warrant contraction/expansion, and how to optimize staffing and equipment levels between locations.

Doing It Well:

- ✓ Compile data on monthly revenues, store costs, lease end dates, number of employees, number of tills, and geographical coverage.

- ✓ Rank stores using the data. Compare best performers to worst performers and identify locations that are doing more with less.

- ✓ Use these findings to optimize your estate by closing underperforming locations, reducing/boosting staff or equipment counts, etc.

- ✓ Consider outsourcing. The right telco consulting partner can help you manage this process if you need a hand.

11. Supply Chain

Effort	⚙	Medium
Cost	$	High
Time Frame	🕐	Medium
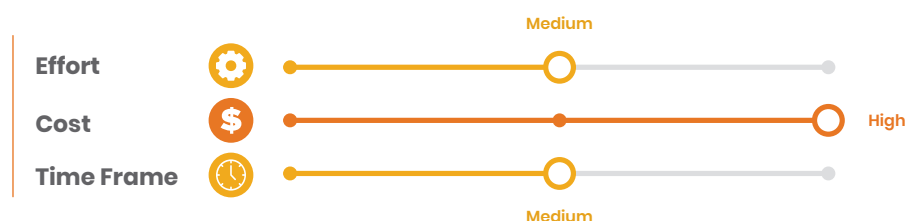
Background:

"Right product, right place, right time" has never been more important. On a good day, supply chains and inventory management can pose various challenges and experience disruption. So, when a global crisis hits, it's not hard to imagine the chaos that follows.

Telcos need to strengthen their supply chain by investing in tools that can adapt to changing demands and ensure long term success.

Doing It Well:

- ✓ Invest in a "cradle to grave" supply chain solution that can enable reverse logistics. Real-time direct integrations connect logistics partners and storefronts to ensure stock doesn't sit in one location for too long.

- ✓ Implement a diverse channel strategy that supports physical and digital channels. A platform approach will enable last-mile-delivery capabilities and create endless aisles.

- ✓ Select a solution that gives a real-time view of inventory across all locations and provides robust controls for demand planning, stock transfers, aging and more.

03 Thriving Long-Term

This pandemic won't last forever, but what will endure are the changes it brought with it. How will you futureproof your operations for the long haul?

Telco's answer to the challenges presented by COVID-19, as well as those that will arise in the long-term, comes down to the same solution – enabling transactions in every channel.

Transact Anywhere

Today's customers want what they want, when they want it – and no two ideal shopping experiences look the same. Some customers would love to visit a store to change their plan. Some would rather order their next device through their phone and have it delivered to their workplace. And others might long to reserve their next device through social media and pick it up from a collection locker. The possibilities are as diverse as the customers themselves.

Few telcos can offer this range of experiences today. So how can they give customers the flexibility they're looking for?

By facilitating an omnichannel experience. At Maplewave, we call this approach Transact Anywhere.

To us, Transact Anywhere means giving customers the flexibility to interact anytime, anyplace, using any combination of digital and physical channels.

This type of experience is impossible without the right supporting systems. So how can telcos bring this to life?

With a digital platform designed for their industry.
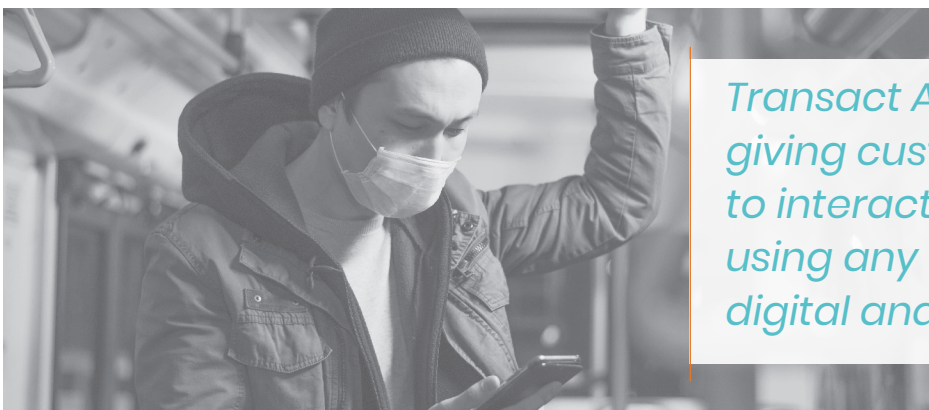
Transact Anywhere means giving customers the flexibility to interact, anytime, anyplace, using any combination of digital and physical channels.

Platform Approach

For Transact Anywhere to work, telcos need to invest in the right infrastructure to connect their physical and digital solutions.

A platform approach connects all touchpoints within the telco retail universe for a consistent experience across channels, and facilitates seamless handoffs between the warehouse, physical & digital retail channels, the customer – and beyond.

Because functionality and integrations are shared across channels, platforms are the quickest and lowest-cost way for telcos to deliver a modern customer experience.

Platform Benefits

- Simple, fast transactions – no need to swivel between systems.

- Enables the use of digital tools like tablets and apps.

- Gives a consistent experience in every channel.

- Coordinates inventory across all channels.

- Gives visibility into all locations.

- Reduces costs and improves profitability.

To survive during this pandemic, it's clear that telcos need to enable transactions in digital channels – and quickly. Telcos that have not yet moved to a platform will need to dramatically accelerate their digital transformation projects.

Beyond the Digital Shift

Adopting a platform approach is just the first step in ensuring telco's long-term survival.

The telco industry has evolved dramatically over the last several years. After an initial period of seemingly limitless growth, high device penetration led telcos to change strategies, reduce costs and diversify their channel strategies.

Today, many telcos are still stuck in this cost-cutting phase. But those few who were ahead of the curve have already started their "digital shift", heavily investing in digital channels to become true Digital Service Providers.

To survive this pandemic, this is where every telco needs to get – and quickly.

But telcos also need to also get ready for what comes after the digital shift. With the imminent arrival of 5G, new strategies will be needed once again. By accelerating their digital transformations now, telcos can set themselves up for success over the next decade – and beyond.

New Consumer Channel Strategy

1 Grow & Control

Continues growth through control & repeatability.

Mostly applies to developing markets.

2 Outsource & Diversity

End of high growth phase; new strategies required.

One-size does not fit all.

Cost cutting via franchise & dealer models.

3 Shrink & Divest

Continue to reduce estates, diversify channel strategy & mix.

Heavy investment in digital content.

CSP > DSP shift.

4 Post-DSP Growth

Post-DSP & Post-5G drives new models.

New products need new tactics.

Flagship > micro store strategy.

Certain markets are highly digital, ahead of the curve of IOT and 5G.

Kiosks are key to this phase.

Developing — Cost Cutting — Digital Shift — Post IOT & 5G

04 Conclusion

We will feel the effects of COVID-19 for years to come. What should your next steps be?

6 Lasting Impacts COVID-19 Will Bring

1. Digital interactions will become the new normal; even slow adaptors will get on the digital bandwagon.

2. Stores will still exist, but their role will change to become more experiential and work in concert with other digital journeys.

3. Customers' spending priorities and budgets will change depending on their new financial positions.

4. Customers may actually prefer some of these new shopping journeys; don't be surprised if some stick around after the pandemic is over, like curbside pickup and door-to-door sales.

5. Execution is everything. Telcos that get this right will do well, but those that frustrate their customers risk losing their loyalty forever.

6. By accelerating their digital transformations and pursuing a Transact Anywhere strategy, telcos can avoid becoming that "dumb pipe" and ensure their success over the long term.

Recommended Next Steps

- Evaluate the capabilities of your current systems and determine which shopping experiences you can currently offer, and which are easy pivots.

- Make changes to your store operations and layout to ensure you can safely re-open when allowed.

- Evaluate your current mix of products and services and enhance your marketing activities.

- Investigate and pursue low-effort projects that can be implemented quickly/cost-effectively, such as kiosks.

- Take this opportunity to examine your estate to find out what's working, what isn't, and how you will change for the future.

- Accelerate your digital transformation project timelines and select a provider who offers a comprehensive platform solution.

Seeking Help

Making a large change to your retail operations can be difficult. If you're struggling with how to adjust to COVID-19, seek out a consultant who:

- Specializes in the telco industry.

- Understands how this pandemic is affecting the industry and the immediate changes that need to be made.

- Offers an industry-specific digital platform and can quickly roll out concrete solutions.

- Can outline a path that futureproofs your business for years to come.

About Maplewave

Maplewave builds technology that powers telco innovation. Their products and services unite all aspects of the telco environment for a true "transact-anywhere" experience; whether customers are shopping in-store, or provisioning a new device from their couch at home, they get a consistent experience regardless of which channel they interact in.

Specializing in digital transformation, customer experience, and inventory management, Maplewave has the solutions and expertise to solve telco's most pressing issues. Today, Maplewave's software is used in over 30 countries; in certain places, you can't buy a mobile device without it.

As telco specialists, Maplewave intimately understands telco's sales strategies and retail models better than anyone on the planet. With global experience that spans nearly every aspect of telco operations, Maplewave's consulting team uses their industry knowledge, solutions and partnerships to overcome any challenge while vaulting their clients to the top.

Headquartered in Dartmouth, Nova Scotia, Canada, Maplewave's global footprint includes offices in South Africa and the U.K. To learn more, visit **www.maplewave.com**

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