



STEFANINI **TRENDS**

COVID-19

Challenges to society and businesses





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FOREWORD

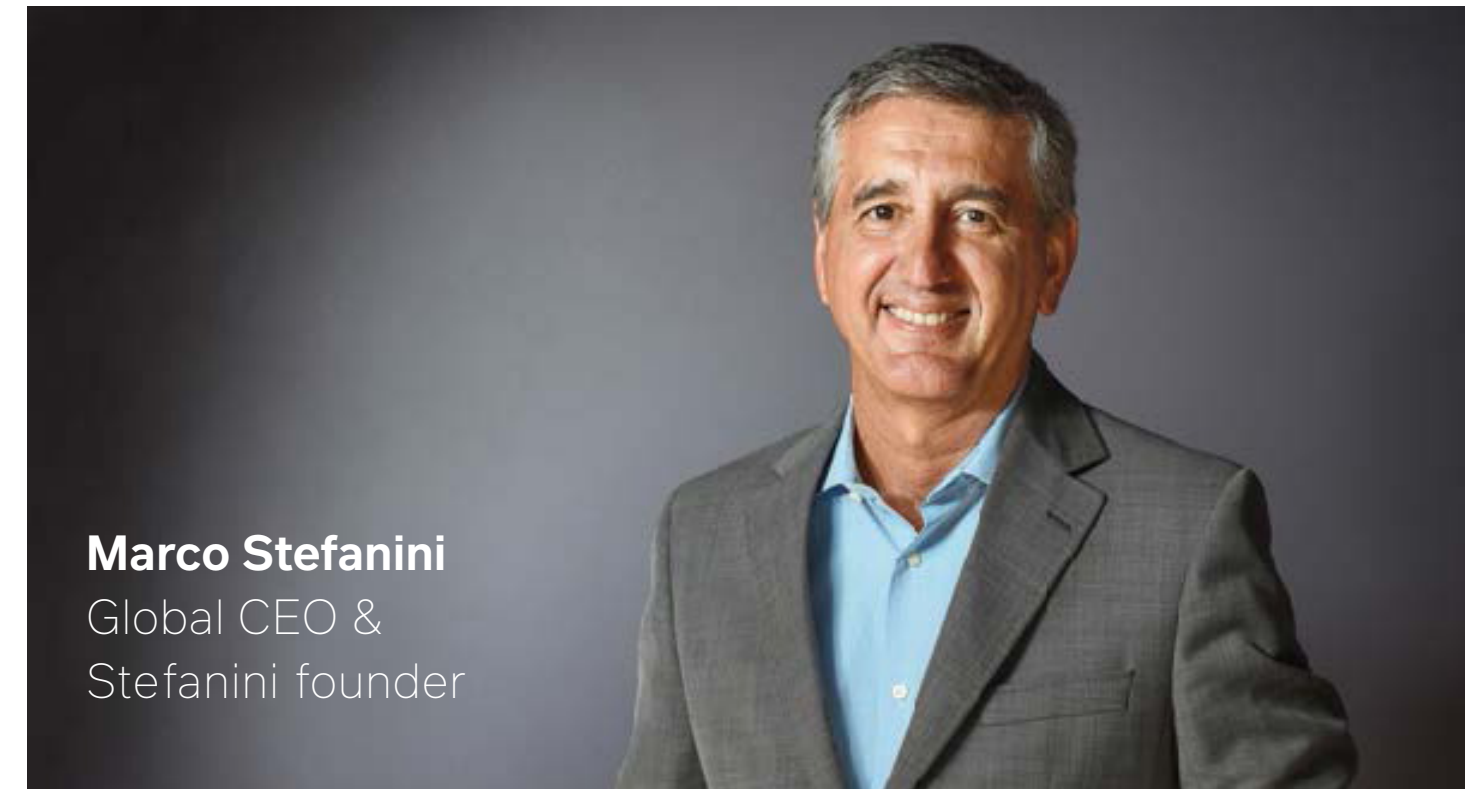
Be ready for the new normal

COVID-19 has created conditions never seen before, introducing multiple changing scenarios. In times when being adaptable is so important, digitally enabled companies are better prepared to respond and to change.

This TRENDS MAGAZINE, put together by our experts, aims to help you navigate times of uncertainty – by looking at the current scenario and considering what the world could look like after this crisis through two different lenses: PEOPLE and BUSINESS.

In sections 1 and 2, we look at what is changing, how to improve people's lives and transform business, bringing examples of how digital technology can play a vital role as we prepare for a new future.

In section 3 we explore our multidisciplinary nature, bringing different views on how to respond to challenging times, from people and digital workplace to digital innovation and customer experience.



Marco Stefanini
Global CEO &
Stefanini founder

SEEING BEYOND THE CRISIS

The COVID-19 phenomenon is new to all; but from a leader's view we must set aside fear of the unknown and act responsibly and cautiously to help society, our collaborations, and our clients endure the moment.

The challenges will be concentrated on improving communication, avoiding unvalidated information that generates uncertainty and panic, and taking advantage of the technology that certainly brings us relevant solutions with high potential value.

The new virus is not deadly, but it significantly confronted us with the changes we wanted to see in the world that were not over. May this be the juncture that invites us to accelerate the need for improvements in the health system, essential services and the experience of our customers.

Every crisis is an opportunity to do different things and learn to get better. It is our responsibility to make the most of this moment.

FORWARD LOOKING STRATEGIES IN TIMES OF CRISES



RĂZVAN ȚAPU
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With the whole world entering choppy waters, now is a good time to remember the words of Franklin D. Roosevelt: *“A smooth sea never made a skilled sailor.”*

The truth of that statement is underlined by the fact that during every period of economic turmoil, there is a silver lining.

A Bain & Company report, published in 2019, analyzed the financial performance of more than 5,000 companies over a ten-year period, including the global financial crisis, and has revealed what that silver lining is. Some 10% of the companies included in the study saw their EBIT growing at an average

rate of 17% during the economic recession and go on to outperform their competition by an average of 13% in the years following.

While there is no recipe to follow to be part of this winning 10%, the same study revealed three guidelines that were followed by these companies during and immediately after the recession:

- Optimize finances;
- Restructure in a smart way;
- Selectively play on the offensive.

The first guideline seems obvious. Commenting on how to respond to a recession, Harvard Business School's Rebecca Henderson puts it simply: *“Rule one is: Don't crash the company.”* This can mean managing working capital in the same way as a start-up, which has to survive from one day to the next.

For the second guideline, the key word is *“smart”*. All companies will have to restructure. But this does not necessarily mean laying off people or slashing the R&D budget. Instead, organizations should gain insight into which of their business activities are producing limited value and reduce the spending on those. Also, they should reduce the complexity and volume of work. Implementing these changes can also enable businesses to bring an updated offering to consumers. And that updated offering will include a combination of the following:

- Lower-priced versions of existing products;
- Products for which customers are still willing to pay full prices;
- Creative pricing approaches such as results-based or subscription pricing;
- Unbundled services and a la carte pricing.

The most surprising guideline is the third one, playing in the offensive. The Bain & Company report noted that the winners of the recession period invested substantially in R&D instead of dialing back, and focused their sales efforts on top priorities. They also maintained their marketing spend, while competitors cut back. And they focused on improving the customer experience, making it simpler and more personalized through investments in digital capabilities.

As a result, these organizations re-invented their value proposition and continuously updated it throughout the entire period in response to the ongoing evolution of their clients' needs – and their continuously evolving understanding of those needs.

And here we see the importance of being agile. Because having to update the value proposition from practically one month to the next requires the entire organization to move in sync, at a fast pace.

In order to achieve this, organizations will have to:

- Put a framework in place that allows for the right mix of centralized and distributed decision making;
- Be empowered by a data-driven mindset and approach at every level within the organization;
- Link the value proposition with the strategic resources they have built over time to minimize the investment needed to bring this to market.

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Andreea Miron – *EMEA People & Culture Manager*

3.5 Delivery:

Florin Ștefan – *Applications Development Director*

1. IMPACTS ON PEOPLE:

a contactless society



CHALLENGES AND OPPORTUNITIES OF SOCIAL ISOLATION

COVID-19 has changed society.

The rapid spread of the disease, which in just three months grew from 25 people affected in Wuhan, China, to almost 1,5 million cases in more than 200 countries around the world, has required global action to bring the pandemic under control and prevent it from causing more casualties.

People have had to remain at home to avoid catching or spreading the illness, which has introduced new challenges across society from a technological, social, economic, cultural and political perspective.

Consumers will now only consume, share and consult information in digital formats and companies need not only to adapt to these new circumstances, but also have a responsibility to help restore a sense of normality to people's lives.

This will be a challenge when, in Europe, as the number of confirmed cases grow, behavior and approaches to entertainment and socializing have adapted significantly in response to new constraints imposed by governments.

But will this just be a temporary change , with us returning to our traditional ways once the pandemic is brought under control?

In fact, as much as we might want to return to our old way of life after the

uncertainty caused by this pandemic, the “Digital Exclusive” mode will change our habits and behaviors forever. In this section we explore how basic daily activities are changing in response to our current contactless society and how this will affect the future and accelerate technology adoption.



1.1 SHOPPING

As lockdowns are imposed throughout Europe and beyond, shopping behavior is **transitioning from panic buying to leveraging digital technologies** to facilitate access to consumer goods.

Panic Buying

Panic buying is not just an economic issue but causes significant psychological effects on the population. Consumers around the world are stockpiling products such as hand sanitizers, canned food and toilet paper, creating supply chain issues and prompting collective hysteria.

According to psychologists around the world, in times of crisis, our brains push us to buy excessively, even when the authorities say there is no need to do so. According to Paul Marsden, a consumer habits psychologist at the University of the Arts in London, the answer can be found in the psychology of “consumer therapy,” where we buy to control our emotional state.

It's about “regaining control” in a world where we feel out of control

People are increasingly seeking to regain control through buying food, hygiene and cleaning products, prompting retailers to ration the number of units that each customer is able to buy of these in-demand items.

More than ever, the authorities are calling on the population to curb hysteria and start making more conscious buying decisions. This situation underlines how resources are increasingly constrained and that our economies are vulnerable when faced with sudden, unexpected growth. Responsible global citizens must should view this situation as requiring a change of mindset in the long run.

Online Shopping

As customers adapt to the new conditions, different forms of online shopping emerge. In the past months, China has seen the rise of sales in e-commerce platforms, along with new retail formats, such as Online-to-Offline channels such as Ele.me, Meituan, and Dingdong Maicai, which connect stores with consumers at home, as well as group purchasing channels (on WeChat communities) where neighbors join together to launch group purchases.

“People are gradually moving from offline shopping to online and the habit won't disappear when the epidemic is over. This will have a very positive impact on the whole eCommerce industry.”

Zhong Zhenshan, vice president of Emerging Technology Research at IDC

Kantar research published this year found that even after the crisis, 42% of Chinese customers say they will buy more frequently from e-commerce platforms and about 31% said they would buy more frequently from new retail formats.

Autonomous Delivery

Contactless technology was once expected to play a significant role when it came to consumption capacity. In China, delivery robot technology has been explored as a way to ensure essential health, hygiene and food products can be delivered without physical contact.

As a result, Meituan in China put its autonomous delivery vehicles on public roads for the first time, while JD.com and Ele.me are sending robots to quarantine areas. In London, an autonomous buggy service from Starship Technologies is delivering online purchases from Tesco and Co-op to customers' door in 15 minutes. Meanwhile, in Madrid, the government is using drones to bring important information to citizens who are confined to their homes.

In summary, autonomous solutions that sound almost like they belong in a sci-fi novel are increasingly becoming real-world, effective solutions to managing the pandemic – and could soon become part of our daily lives.



1.2 PAYING

Fear of contagion is not just in terms of contact between people. The World Health Organization (WHO) announced that COVID-19 is also transmissible from contact with varied surfaces, including metal.

The dilemma of physical money was already something we were used to: the more developed economies were already beginning to show the decline in the use of physical means of payment, and the less, even with great challenges towards the digitization of the economy.

The Coronavirus crisis seems to want to change this too. The possibility of contagion of people from payment with physical money has been a turning point.

In the near future, the demand for virtual, fast, global, secure, cheap-to-use digital currencies will increase significantly. Experts add that people and companies will need an architecture that enables them to trade with lower counterparties Risk and higher security for making and receiving payments.

In Italy, digital payments have risen 81% since the end of February.

Cryptocurrency

This move towards digital payments, however, is not benefiting cryptocurrencies. As a result of the coronavirus outbreak, Bitcoin lost half of its value in a single day at the beginning of March, with uncertainty driving investors towards the safety of cash.

It is unclear what impact this will have on the medium and long term, with the cryptocurrency and stock markets needing to assess the current situation and wait for the return to normality. How much time this will take is still unknown.



1.3 WORKING

Coronavirus has caused the world's largest work-from-home experiment, according to Bloomberg News.

One of the biggest impacts on people's behaviors has been the enforced change in traditional working culture.

Global Workplace Analytics claims that, as of this year, nearly two thirds of global companies allow their staff to work remotely. However, this is typically on a sporadic basis rather than a sustained or permanent arrangement. With this in mind, companies may face a significant challenge in the near future, with permanent remote working becoming a more likely prospect as the virus continues to spread.

There are still many questions regarding remote working and its impact on effectiveness, efficiency and collaboration. It's time to put work-from-home initiatives to the test and use this experience to improve remote working solutions after the crisis.

Workplace reinvention

Most companies will need to invest in infrastructure in order to enable their employees to work remotely, and will also need to develop plans to ensure critical operations that cannot be carried out remotely can still go ahead.

The **automation** of critical processes can relieve pressure on those workers who cannot carry out their work remotely without risking operational failure.

Agility will also be key, with a great opportunity to experiment with agile tools, practices and disciplines at a distance.

There are communication and collaboration tools that allow businesses to create a working environment that closely resembles the face-to-face experience, as well as to create development and approval environments in the cloud that enable fast and secure access to carry out key day-to-day activities. The challenge for businesses will not be the tools, but instead will be the mindset.

Companies need to invest to make their infrastructure more modern, in the cloud and with well-defined security policies.

Both remote working and customer service in an exclusive digital environment requires good infrastructure to support the sudden increase in user volumes.

Connectivity specialists, meanwhile, predict that the long-term development of China's 5G mobile services industry will accelerate, as the outbreak has seen an increase in

multiple applications requiring a faster and lower Internet connection latency, such as live streaming and teleconferences. This, however, is likely to happen after the pandemic is controlled.

While the acceleration in improving global connectivity will not take place at the rate required, the epidemic will put pressure on change, especially in specialized sectors, such as medical services and security. **There's a greater opportunity to push for faster, widespread adoption of 5G as a result.**



1.4 STUDYING

Just as the working environment is being affected by the spread of COVID-19, schools have also had to move to an online environment to protect the health of students and teachers.

Currently, more than 30,000 schools in the United States are closed due to concerns about the spread of coronavirus, which affects the education of at least 20 million students; in other European countries the whole education system is paralyzed with no estimate of when schools will reopen.

Online education faces significant challenges and questions about its effectiveness; educators with remote learning experience warn that closures are a serious threat to children's academic progress, safety and social life. And managing a classroom of young pupils digitally is complex and very different from shifting a business run by adults to an online environment.

We don't believe online education will replace offline education, just as social media can't replace face-to-face conversations. Online and offline education services compete for students' time, which is limited. However, offline education services will continue to play an important role in the market and the education sector will need to find the right balance between online and offline teaching methods.



1.5 GETTING MEDICAL CARE

Telemedicine is not a new subject, with systems or resources being developed over the last decades to diagnose diseases remotely. Now, the spread of COVID-19 has introduced a new urgency to this need.

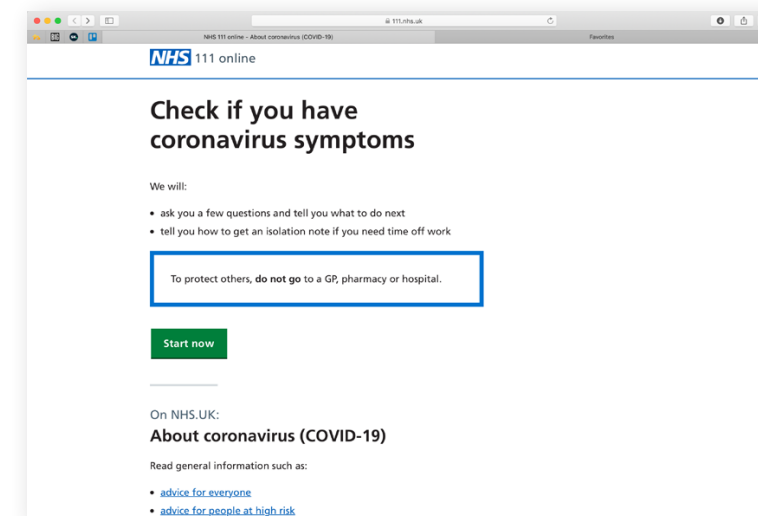
At this juncture, doctors, hospitals and insurers are rethinking how technology can be used to free up capacity at hospitals and clinics, while reducing the risks of infection.

China is developing digital tools to reduce the influx of patients in hospitals. Xuhui Hospital is the first public health center in Shanghai to receive approval for remote diagnosis and treatment. The hospital uses a combination of artificial intelligence tools and a mobile application to diagnose and monitor cases.

Large technology companies are also developing online care solutions for coronavirus patients. WeDoctor and Alihealth already have more than 1,000 associated doctors and serve 1.5 million people per month (about 3,000 people per hour).

In New York, new robotic technology is being used to assist in the battle against coronavirus, facilitating conversation among patients and hospital staff and delivering medication.

In Europe, digital channels are in being used to provide remote assessments, reducing the number of patients going to hospitals for primary care.



Care on demand

Telehealth, the virtual care platforms that allow health care professionals and patients to meet by phone or video chat, seem tailor-made for this moment in time.

Now is the moment to explore ways of harnessing these technologies beyond screening and treating COVID-19 patients. Telehealth also provides an option for routine care to the elderly and other high-risk patients.

1.6 GETTING INFORMED

On 2 February, the World Health Organization called the Coronavirus a “massive infodemic,” referring to an abundance of information – some accurate and some not – making it difficult for people to find reliable guidance to cope with the crisis.

In addition, panic at the lack of information, or, on the contrary, the excess of unverified information, has led to an increase in xenophobia, including online racism and harassment, and widespread allegations of discrimination against people of Asian origin globally.

In this crisis, social networks have an enormous responsibility for the content generated on their platforms. Indeed, companies that own these platforms have been involved in efforts to control the flow of information generated in relation to the pandemic, alongside health organizations.

TikTok has attempted to remove deliberately misleading videos, trying to mitigate misinformation that could cause harm to the community or the general public. Facebook is also working to remove posts with dubious health tips, and Tencent, the owner of WeChat, has used its fact-checking platform to examine rumors about Coronavirus circulating online.

But the great avalanche of content has overwhelmed coordinated efforts to eliminate all misleading information, creating a breeding ground for negative content. However,, social media has also become a space for collective empathy and generosity. On Weibo and WeChat, stories of kindness abound. While there are expressions of fear from quarantined people and patients who cannot receive treatment, there is also an atmosphere of empathy and generosity on these channels.

The coronavirus pandemic underlines the significant impact of social networks on society. Companies in this sector will need to consider their content ethics systems, particularly at times of crisis.

Artificial intelligence may play a predominant role in this effort to oversee content shared on social media, which in turn could trigger discussion about heavy-handed government control or ‘Big Brother’.



1.7 HAVING FUN



One weekend at home watching Netflix is fun.

What about every weekend?

This crisis is also affecting one of our most basic desires – having fun.

By preventing social gatherings and causing the cancelation of major events, COVID-19 is challenging people to find new ways to entertain themselves at home.

Digital technology, like streaming and interactive platforms, is connecting people and bringing them to events that they would normally attend physically.

Video communication platforms, like Zoom and Houseparty, are seeing a huge increase in the number of users – people who just want to hang out with their friends and play games to stay connected.

Music channels and venues are also promoting **virtual music festivals** in which artists play from home and the audience watches the concerts through streaming platforms like Instagram and YouTube. At the end of March, iHeart Living Room Concert featured performances from Elton John, Dave Grohl and other artists.

For the first time in its history, the **Bolshoi Theatre of Moscow** has announced that it will broadcast several classical opera and ballet performances (known as the “Golden Series”) live on the theatre’s YouTube channel for free viewing.

The entertainment industry is also taking advantage of this opportunity to attract new users on digital channels – by offering free content and creating new channels, they are investing in a new audience that may consume more online content after the crisis.

2. IMPACTS ON BUSINESSES: business transformation



A BIG PUSH TOWARDS THE DIGITAL BUSINESS

The digital age is now part of our lives and the urgency of its effective implementation doesn't relate to future trends but instead the concrete reality that society now needs to function with limited physical contact.

Nearly two decades ago, SARS, a deadly respiratory disease with flu-like symptoms, spread throughout China, infecting more than 5,000 people and killing nearly 350 in July 2003.

When an employee in Hangzhou, China, showed symptoms in May 2003, the office was closed, and the company's 400 employees were ordered to stay at home as a precautionary measure.

It was at this time of crisis that China's e-commerce sector experienced major growth resulting in significantly increased competition from the East against large Western online logistics models.

In light of these facts, the idea that coronavirus could have a similar effect by digitizing economic and social habits does not seem far-fetched. Indeed, there might longer-term effects than those caused by SARS because of the global impact of this pandemic.

"People are gradually moving from offline shopping to online shopping and the habit won't go away when the epidemic is over," said Zhong Zhenshan, IDC's vice president of emerging technology research. "This will have a very positive impact across the market."

The coronavirus outbreak is challenging companies of all backgrounds to think creatively about how to successfully continue operating – including shifting towards digital and becoming more efficient.

After the epidemic, most companies, including those that have been slow to shift towards digital, will need to consider digitization within their operations.

However, simply being present in the digital world will not be enough, as companies will need to adapt to new online formats that they could not

have imagined before mandatory digitization. The key to keeping their users loyal will be the quality of their products and services, and the flexibility of their operations.

In every crisis there is an opportunity to innovate

Coronavirus could be a key catalyst for innovation. It creates a unique historical moment, prompting us to rethink models we once thought were difficult to challenge, while bringing a mindset of innovation and value.

Many investors believe that the period after the crisis could be an ideal time to invest in new ideas that have emerged in the context of the pandemic. The truth is that businesses will only succeed with a more inclusive, collaborative vision that is able to meet the real needs of society at not just economic but also an ecological level.



2.1 OPEN SOURCE BUSINESS

OpenConvid19 is a Giant Collaborative Laboratory that was recently formed to find solutions globally to mitigate the impact of Coronavirus.

This initiative aims to develop open source methodologies, using common tools, to tackle the crisis. This community does not want to create intellectual property, but to open the discussion so that humanity can achieve solutions not only for medical diagnosis but also to tackle social problems caused by the pandemic.

Initiatives like this are called **“open knowledge”**. Creating business value from cooperation and exchange between different players can generate innovation at times of crisis at a lower cost.

We could start to see companies, actors and communities willing to collaborate to make effective use of materials, technologies and knowledge. **Open is a new form of society, not just business.**

IBM “Call for Code” is engaging the developer community in global challenge to take on COVID-19. The purpose is to build open source solutions for immediate and lasting impacts.

Facebook Online Hackathon creates a community of innovators to work on solutions involving Artificial Intelligence (AI), Augmented Reality (AR) and Messaging, leveraging impactful solutions through the company's technology.



2.2 PLATFORMIFICATION

For at least 2 years now it has been mentioned that we are in “the era of platforms”.

The platform concept refers not to a technological tool or middleware, but to companies' ability to make use of core business products/services outside their own domains.

Boundaries that delineated business and industrial sectors are disappearing, and technology allows customers to partner with new types of businesses to bring about disruptive changes in existing business models, with examples ranging from Uber to peer-to-peer loans. We are in the age of digital platforms, which are open 24 hours a day, 365 days a year, meeting the increased expectations of consumers who demand almost instant service.

This vision is complex, and indeed in most markets, it is seen as abstract and undeliverable. On the other hand, big tech businesses are adapting their business model in line with this vision. For this reason, we see them delivering services outside of what many would view as their original business purposes.

For example, news aggregator **Jinri Toutiao**, operated by TikTok owner Byte Dance, recently introduced access to local services, including grocery delivery, food and medicine, in partnership with third parties.

This collaborative and cross-cutting capability is a critical following the coronavirus outbreak. Customers are not able to travel physically and require significant support to simply go about their day-to-day activities. As a result, platforms have a greater role to play than ever.

According to a global Kantar research (Mar 2020), 78% of consumers believe brands should use this moment to help them in their daily lives.

This new vision of aggregation of services allows companies to create unique experiences which add true value to customers.

In times of crisis, users value platforms because they allow them to connect with content, companies or other users. At a time of limited physical contact, the ability to maximize and optimize contact with the outside world is highly valued.

2.3 EMERGENCY SUPPLY CHAIN

Coronavirus has caused new consumption habits and made it difficult to achieve the correct balance between supply and demand. Temporary factory closures in China, as well as panic buying and difficulty in storing certain products, is undoubtedly affecting this global balance.

Countries badly affected by the pandemic, including Italy, Spain and China, have had to quarantine their productive workforces.

On top of this, China plays a central role in complex global supply chains. The closure of factories in Chinese provinces affected by coronavirus can send shockwaves through a wide range of industrial sectors.

In mid-February, an **Oxford Economics** study estimated the cost of worldwide production losses resulting from paralysis of industrial activity in China would account for around 1 billion US Dollars (about 923 million Euros), equivalent to 1.3% of the economic growth forecast for this year globally.

South Korean car manufacturer **Hyundai** was the first non-Chinese car company to announce that a shortage of components had crippled production at its local factories. Other carmakers in Europe and the United States have mentioned that they are also close to running out of components for production.



The technology sector may suffer a similar impact, as China is the largest manufacturer of electronic components, accounting for around 30% of world exports.

Companies must now anticipate potential operational problems that may affect the supply chain, making sure to keep their customers informed and offering alternatives where necessary. In addition, companies will need to play a role in ensuring customers avoid panic buying contributing to a climate of fear.

During the crisis, consumers will demand a quick response to their questions. Whether reactively or proactively, companies must ensure that service personnel or engagement channels can respond in a timely manner to provide critical information to their customers.

The ability of companies to keep their customers updated on established service levels and expectations, or recommended or proportionate alternatives, will be critical in attempting to mitigate the side effects of the pandemic.

Fortunately, new technologies are emerging that dramatically improve visibility across the end-to-end supply chain, supporting companies' ability to resist shocks. The traditional linear supply chain model is transforming into digital supply networks (DSNs), where functional silos are broken down and organizations become connected to their complete supply network to enable end-to-end visibility, collaboration, agility, and optimization.

Leveraging advanced technologies such as the Internet of Things, artificial intelligence, robotics, and 5G, DSNs are designed to anticipate and meet future challenges. With these platforms we can simulate different scenarios, including war, terrorism, regulatory change, labor dispute, sudden spikes in demand, or supplier bankruptcy. Organizations that deploy Digital Supply Networks will be ready to deal with the unexpected.

2.4 TRAVEL

One of the sectors most disrupted by coronavirus has been the tourism and entertainment (outdoor) sector. The sector has experienced a dramatic drop in passenger traffic as a result of people's fear of getting infected when travelling, while governments have advised against all non-essential travel.

The **International Air Transport Association (IATA)** anticipated that airlines could lose up to \$113 billion in revenue this year due to the impact of the virus.

The German airline **Lufthansa** is an example of this, recently announcing that it will reduce its capacity by up to 50% in the coming weeks to deal with the financial consequences of the crisis.

The impact of the virus on aviation has also been reflected in stock markets in recent weeks, with widespread declines of around 10% and a lot of volatility in stock market-traded securities.

Losses are so significant in this industry that, in the coming months, it seems inevitable that there will be drastic reductions in jobs and flight schedules and services on different airlines around the world.

Even after the crisis, both airlines and tour operators will need to combat the long-term effects on their profits.

This is particularly the case given that people were also delaying buying tickets for future travel, due to the uncertainty surrounding the outbreak. As a result, several airlines have already collapsed.

In order to try to reduce the impact, some companies have adjusted in a number of ways, including:

- Providing zero-fee and flexible bookings
- Offering travel credit in the place of cancelled flights
- Cutting the work weeks to three and four days from April through the end of June
- Introducing additional hygiene measures on planes

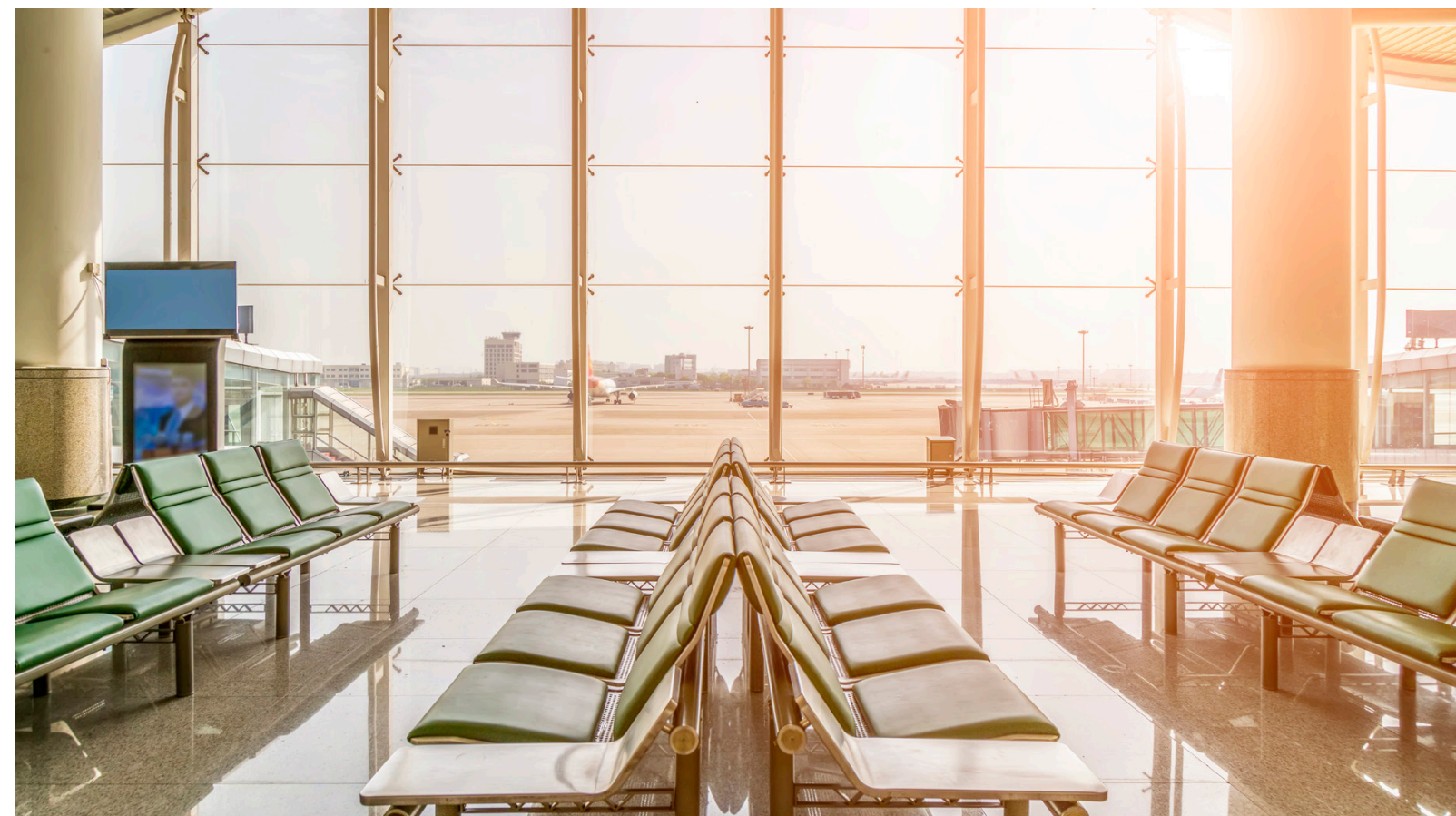
The **World Tourism and Travel Council** analyzed previous major viral epidemics, and found that the average recovery time for visitor numbers to a destination was 19 months and forecasts that China's outbound and domestic travel markets won't fully recover until about 2023.

Once the outbreak is over, it could take up to 10 months for the industry to recover. The tourism industry currently accounts for 10% of global GDP.

It will be essential for these companies to consider how to dramatically improve their customer experience, ensuring future loyalty, which can translate into positive results after the quarantine.

Large corporations must also resist the temptation of cutting their entire innovation budget and instead choose to invest their resources much more strategically.

We also hope that the ongoing crisis will serve as a wakeup call for the travel industry to work together on open data initiatives during the aftermath.



2.5 HEALTHCARE

The main danger of a pandemic such as the current one is the sudden rise in cases, leading to hospitals being unable to cope with a massive influx of patients. This situation has been a focus among most countries affected by the contagion.

A sudden influx of cases not only complicates treatment among those seriously ill with COVID-19, but also anyone who requires any kind of emergency hospital assistance. The situation may worsen if medical staff begin to become infected and as a result will need to stop caring for patients.

In China, the rapid reaction aimed at managing an influx of potential patients included building new hospitals in record time (up to 10 days). However, this is unlikely to be a viable solution globally.

In Europe, the current crisis in Italy and developing in Spain is characterized by demographics, with both countries supporting older populations who are more vulnerable to becoming critical patients.

In China, 80% of cases were mild, 15% required hospital treatment and 5% were critical, and this was because the average age of infected patients was between 47 years and

60. In Madrid, the numbers change, 60% mild, 30% need treatment and 10% can be critical; this is because the average age of patients is between 60 and 73. In this sense, increasing longevity in society globally is and will be a major care challenge.

But it's not only a lack of hospitals beds; there are also too few ICU specialists and other material resources, including ventilators and protective equipment. Faced with this situation, one response has been to train other types of healthcare workers, including assistants and even cleaners.

It is because of this obvious shortage that health experts and authorities place so much importance on preventive measures aimed at avoiding mass contagion. This has been launched on social as #FlattenTheCurve, drawing attention to the importance of avoiding saturation and the collapse of the health system globally.

The medical community is drawing attention to the responsibility of everyone to stop the epidemic by prolonging it over time. This would ensure the spike in cases is less severe, and that the volume of simultaneous patients will not overwhelm the health system.

Another measure being taken to address the lack of resources – affecting countries around the world – includes medicalizing hotels and nursing homes to care for mildly affected people.

Another solution being prioritized is distance treatment. For patients who do not need intensive care and who can be treated from home, there is the option of remote medical treatment with delivery performed by robots. In China, the telemedicine business JD Health is offering patients free consultations while the pandemic lasts and is tempting pharmacies to the platform to sell medication safely.



3. OTHER VIEWPOINTS: different perspectives



DIFFERENT PERSPECTIVES IN STEFANINI ABOUT THE ACTUAL MOMENT

In an attempt to bring Stefanini's vision of technological, labor, social and economic trends that accelerate from the advent of COVID-19 to our global reality, we want to summarize our views through several different viewpoints:

3.1 Business Agility to overcome COVID-19 crisis



GIULIANA VERONESE
Chief Digital Solution Center
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COVID-19 is presenting many challenges to different kinds of businesses. The global economy will suffer a greater impact than we have never seen before and many companies are already experiencing financial problems. To deal with these challenges, companies need to identify opportunities and threats and respond quickly and effectively to them. As a result, business agility seems tailor-made for this moment.

An agile business is an organization that embraces the agile philosophy and values at its core, from its people and culture, to its structure and technology. It enables a business to be adaptive, flexible and creative through a changing environment.

One of the main characteristics of business agility is the customer-centric approach. It's more important than ever to understand customer needs and expectations. Act with empathy and make your customer feel safe and supported in the middle of a phase of uncertainty and insecurity.

Business agility requires small, cross-functional autonomous teams that are more able to change direction when needed. But it also emphasizes the importance of promoting a stable internal system and processes that clearly define objectives, task divisions and responsibilities.

Most agile businesses will agree that open communication is vital, ensuring information flows easily in both directions (top-down and bottom-up) to accelerate the decision-making process.

A culture of learning is critical to business agility and this can be a challenge when all teams are working remotely. Therefore, it is important to define workshops, mentoring initiatives and projects that support a growth mindset and keep the entire team motivated.

This time of crisis provides a good opportunity for exploring business agility. We can rewrite the future of our businesses by becoming more employee- and customer-centric.

3.2 The impact of Pandemics on the Digital Workplace



PETER KEANE
Digital Workplace Director
Stefanini - EMEA

Stefanini, like many service providers, has been developing solutions for the provision and support of the employee-focused digital workplace.

The goal of the Digital Workplace is to enable employees to be able to work anywhere and at any time they choose, while enabling collaboration for the co-creation of new business opportunities and solutions. This support for the 'Digital Nomad' type of persona is seen as a key requirement, to attract and retain the best talent for the development of the business.

This corporate Digital Workplace should reflect the best aspects of consumerization, providing devices and applications quickly through fully automated requests and zero-touch provisioning. Individual team and corporate collaboration tools are essential, and world-class support must be available through the omnichannel service of their choice, from traditional voice to walk up digital cafés.

The pandemic has created the situation where the Digital Workplace has become a necessity, as large parts of the workforce that can work in social isolation in their homes are effectively being fast-tracked to being digital nomads.

In Europe, many of our clients provide the opportunity for their staff to work remotely from the office on a permanent or occasional basis, often supported by hot-desking and smart meeting rooms in their main offices. However, with the impending impact of the pandemic, many companies instructed their staff to work from home, prior to the formal social isolation we have now seen governments apply across Europe.

As this occurred, our Stefanini service desks received an average increase of 11% more incidents as our clients' remote employees had connectivity and access issues, as well as a significant increase in major incidents on our clients' network infrastructure.

The pandemic has highlighted the issue that business continuity planning is not limited to natural disasters and civil disturbances, but must now be ready to deal with future pandemics to ensure business continuity.

It is essential that the new Digital Workplace is both pandemic resilient and scalable across the business, and most importantly increases the level of digital dexterity and cooperative working across the organization.

There are some important considerations for a Pandemic Resilient Digital Workplace.

- The need for effective collaboration services, and new management techniques.

People new to working from home are rapidly closing the digital dexterity gap through the effective use of collaboration software, and recreating a happy workplace. Staff are engaging in the use of Teams and other collaboration software, not only to get work done but to replace the in-person coffee break chat, actually planning this for specific times in the day to keep the group social dynamics in place.

This has created the opportunity for the IT organization to engage in 'digital coaching' of employees while they are in the flow of work.

- The supply and support of the Digital Workplace presents new challenges:
 1. Each employee should have two devices, a computer and a smartphone so that support communication can be maintained.
 2. Devices must be supplied through zero-touch provisioning. Devices are delivered by courier and then installed/managed via tools such as Auto-pilot and intune.
 3. The remote employee must be able to remain productive and work at full speed. Installed agents would monitor the devices and network performance, supporting self-heal and remote problem resolution.
 4. Physical deskside support is now replaced with remote support, with appointment booking of engineers completed via the service desk for complex resolutions, or directly via a portal for digital coaching.
 5. Proactive communication and a single point of contact will continue to be provided by the service desk via any channel that the employee prefers to use or can access at any point in time. The service desk will continue as the foundation for employee support, with the service desk staff themselves working from home and maintaining their 24-7 shift availability.

3.3 The way you treat your customers now will define your relationship for years to come.



MATEUS MACHADO
Experience Design Lead
Stefanini - EMEA

It's a pandemic! Things will be tough. You will need to plan, adapt, respond. You will have to show resilience, be strong, be careful, think fast. All this working from home, away from the ideal work environment, while your kids fight for attention.

Just remember – it's not just you. It's everyone. All people are being impacted, all the relationships you have are going to be affected. You will get closer, you will help others – especially those who need special attention. But you will also respect their space, give them some time and avoid physical contact.

If it's like this between people, why should it be different between people and businesses? When discussing customer experience in times like these, businesses need to understand that CX is nothing more than taking care of the relationship a business has with its customers. And the way you treat people when they are having a hard time will define your relationship for years to come.

It starts with customer service, by helping them when they need assistance, but it goes all the way to being proactive and offering your help in moments when they are not expecting it. When a brewery starts producing and distributing hand sanitizers, when an airline drops fees for changing flights, when a company shows their customers they care, they create a more meaningful connection.

It's nothing new, it's about designing "WOW" moments in the customer journey to win loyalty in the long term. But in times like these, even small actions can make all the difference.

And in moments when almost all interactions can't be physical or in person, digital touchpoints offer all the tools for identifying the right moment and the right message to each of your customers, adapting your response according to their context and needs.

Data analytics allows businesses to anticipate customer actions and be proactive, digital platforms allow integration with other services and offerings that go beyond the core business, streaming and social media platforms allow you to create and distribute relevant content.

The following months will not be easy for anyone, so if businesses give their best to create meaningful experiences, they will be investing in solid relationships and loyalty which will last long after the crisis.

3.4 When times get tough, we don't give up! We adapt, learn and enjoy the process!



ANDREEA MIRON
People & Culture Manager
Stefanini - EMEA

As everyone knows, these past few weeks have changed the world around us. The spread of COVID-19 has had major impact across the globe. Our lifestyle as we know it – work, entertainment and our social life – is now so different. Countries are moving into lockdown and governments are declaring national states of emergency – all this is creating a sense of insecurity and ambiguity, for both, social and economic sectors.

As a consequence, COVID-19 forced people around the world to rethink their daily lives from work to school to entertainment – travel bans, schools closing, recommendations to work from home and to not gather in large groups – all aimed at protecting us and the people around us. As a result, many people turned to digital tools to keep some semblance of normality.

Yes, this crisis is a big challenge, maybe the biggest one for our generation. But we also have a great ability to adapt. It is normal to feel anxiety, frustration, fear – the key is to be aware that mixed feelings about this are normal. Let's try to make our best out of it – for example, spend quality time with those already in our households.

Of course, we can see an economic impact as well – businesses won't be the same after this pandemic. Those companies able to use technology in a creative way will keep the lights on, and will rethink their business model for the future by fast-tracking digital transformation. We will see organizations change their mindset, be more creative and focus on digitalization.

While the ability to work from home is a benefit many employees value, many companies lack the technology infrastructure to offer that capability without sacrificing their ability to offer "business as usual". However, the current situation means companies now realize the benefits of fast-tracking digital transformation, and will keep this same approach after this crisis passes. For the ones that cannot maintain the work from home approach, it will be a lesson learned and they will know how to accommodate it in the future, if it's required due to another outbreak or other reasons.

In today's ever-evolving business world, the complexity and pace of change can be discouraging. Flexible leadership – especially during this time of crisis and instability – is critical for the success and longevity of organizations. We have started to see how flexible our leaders are and their ability to adapt – they will also keep the same approach in the near future.

The times we are passing through challenge us every single day – how we interpret, react and bounce back from the crises of today will prepare us for the world we will face tomorrow.

3.5 Reinvent yourself.

Transform yourself.



FLORIN ȘTEFAN

Applications Development Director
Stefanini - EMEA

We are living strange times where flexibility and adaptability are key issues. It is time to reinvent ourselves and adapt to the new context.

The communication and collaboration tools that are available, although not a substitute for face-to-face interactions, allow a very close to face-to-face experience.

This combined with the ability to run operations in the Cloud, help ensure fast and secure access no matter the physical location of employees.

Virtual teams have been a reality for the software development industry for many years; the only thing that differs today is the scale.

Different organizations are at different stages with remote work, but few of us have done it at the current scale. To help support our customers, we are putting extra focus on being productive while working from home by using virtual meeting tools and techniques to build relationships in a new working environment.

The current challenge presents us with the need to be close even if we are physically distant. Closeness is key for the value cycle to work properly, as constant alignment with our customers' expectations and priorities promotes the search for competitive and high-value products.

During times of uncertainty, while many companies go out of business, many companies respond to the same circumstances by reinventing themselves and coming out stronger. We can't underestimate what can be achieved through transformation.

Mindsets should change from survival mode to reinvent or transform mode. We are facing an opportunity of what we will be and not how we should preserve the way we used to operate.

Now is the moment to adopt and prioritize initiatives that will change your business model, to adapt and boost it through digital technologies. It is the time to use your data to understand your customer's behavior, to react, and to adapt quickly. It is the time to accelerate and transform.

We are prepared to help customers in these special times to reinvent and transform through technology.

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