PHOENIX or DODO?

The FIRESTORM DISRUPTION

it's an UNPRECEDENTED CHALLENGE...
...COMING from ANYWHERE!

it's your RESPONSIBILITY to DEAL with it!

The PHOENIX ENCOUNTER method

ATTITUDE SWITCHING
PROACTIVE SCANNING
RADICAL IDEATION

IMAGINE DESTRUCTION
...BEFORE it HAPPENS to YOU

DRAMATIC WAR-GAMING
GUIDED ANALYSIS
BLUEPRINT PREPARATION

COMPLETELY OPPOSITE
VIEWPOINTs DEBATE
The Phoenix Encounter Method

1. Phoenix Seeking
   - Encounter Groundwork
     - Attitude Switch
     - Battlefield Preparation
     - Mindsets
     - Value Propositions
     - Trends
     - Phoenix Attitude
     - Why do we do things the way we do?

2. Phoenix Burning
   - Encounter Battlefield
     - Extreme Attack
     - Horizon Defense
     - Imagine the most radical attack... and lead your organization toward a more formidable future!

3. Phoenix Rising
   - Encounter Breakthrough
     - Future-Facing Blueprint
     - Embedding Phoenix DNA
     - New Value Propositions
     - New Business Models
     - New Strategic Priorities

Past successes can lead you to be...

- Complacent
- Arrogant
- Cautious
- Overwhelmed

The Legacy Trap

See the future

Proactive Scanning

- Beyond Industry & Geography
- Outside-in Thinking
- Future-back Thinking
- Perceptive Questioning
A crisis like never before...

Pre-COVID 19
(Till Jan 2020)

COVID Crisis
(Jan 2020 – 202x)

Post-COVID
(202x Onwards)

Healthcare
(Prevention, Treatment, Vaccine)

Social Distancing

Lock Downs

Demand and Supply
Shocks

Restricted Access

Cash Flows

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for the World

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New ways of living, working and learning – raising existential questions?

COVID Crisis (Jan 2020 – 202x)  ->  Post-COVID (202x Onwards)

- Are these changes permanent or temporary?
- Should firms rethink their business model based on the crisis experience?
- Is it an opportunity or challenge to rebuild businesses now?
- What is long-term value vs. short-term cost implications of changing business processes?
What would be the vision of an ideal business that can ride through the crisis and grow in the Post-COVID19 world?

Agile Business Model

- Flexibility to adapt to demand and supply shocks
- Speed of Response
- Anticipatory Intelligence
- Growth & Profitability
A panoramic scan - how businesses are leveraging technology to ride the crisis effectively

**FIRM VALUE-CHAIN**

Corporate Operations (Human Resources, Marketing, IT, Real Estate)

- Robotics
- AR/VR
- 3D Printing
- Platform Tech
- Data & Analytics
- Cloud Computing
- AI

**Resources + Business Processes**

- Flexibility
- Speed
- Anticipatory Intelligence
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Corporate Operations (Human Resources, Marketing, IT, Real Estate)

- Product Development & Engineering
- Sourcing & Supply Chain
- Manufacturing & Operations
- Customer Experience & Delivery

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AR/VR
3D Printing
Platform Tech
Data & Analytics
Cloud Computing
AI

Resources + Business Processes
- Flexibility
- Speed
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AI-Powered solutions proved critical in enabling businesses to scale up their capacity and operate efficiently during the crisis.

Learnings:
- Algorithmic inexperience and training gaps in handling demand and supply shocks
- Reliance on human workers to adjust for ‘black swan’ events
- Privacy Challenges
AI-powered solutions powered several healthcare applications

Pandemic Forecasting & Impact Analysis

Hotspot Detection

Surveillance

At Risk Patient Monitoring

Patient Diagnostics

Drug Discovery

Challenges

- Lack of Integrated Data
- Accuracy
- Privacy
- Hype vs. Reality
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Flexibility
Speed
Anticipatory Intelligence
Growth & Profitability
Robotics adoption that was already gaining momentum prior to the crisis got significant attention and focus during the pandemic.
Autonomous Mobile Robots proved useful in disinfecting surfaces, delivering food and medicine to patients and in surveillance of public places.
Retail and eCommerce companies doubled down on robotics solutions to automate repetitive and high-value tasks.
Drone delivery infrastructure and network set up for delivering medical supplies to rural communities is proving critical for battling COVID-19 in Rwanda

- Entire Day by Car vs. 30 mins by Drones
- Completed 42K+ commercial deliveries till date
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AR/VR tech solutions have found new use cases in the crisis

**CONSUMER**
- Property Inspections
- Furniture Sales

**HEALTHCARE**
- Home Furnishing
- Patient Diagnostics

**BUSINESS**
- Training
- New Employee Training
- Remote Maintenance & Operations
- New Production Process Training
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FIRM VALUE-CHAIN

Product Development & Engineering ➔ Sourcing & Supply Chain ➔ Manufacturing & Operations ➔ Customer Experience & Delivery

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The COVID 19 crisis showcased the potential of 3D printing technology to enable on-demand production.

3D Printing Applications

COVID-19

- Hygiene Masks
- Respirators
- Ventilators
- Nasal Swabs
- Facial Shields
Manufacturing and sourcing marketplaces has allowed companies to be more agile by tapping into a bigger pool of suppliers and manufacturers.

- AI-Powered Assessments and Recommendations
- New Supplier Discovery
- On-Demand Access
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Hospitals turned to online platforms to access and share crucial supply of PPE and ventilators.
On-Demand Freight and Warehouse platforms are uniquely positioned to leverage their data and technology to quickly adapt to rapidly shifting demand and supply scenarios.

Value Proposition

- On-Demand Access
- Real-time capacity visibility and price transparency
- Variable Cost Structure
Alibaba rolled out several new features to digitise transactions between international buyers and sellers on its B2B platform.
China's eCommerce platforms are tapping their users, technology and data to revive demand across a diverse range of verticals.
In Kenya, B2B fresh produce platform, Twiga partnered with B2C platform Jumia to redirect fresh produce from vendors to homes.

**Pre-COVID 19**

Produce from 17,000 farmers supplied to:
- 3,000 outlets
- 8,000 vendors

**During COVID19**

Rebundled bulk fresh produce to cater to families for 1-2 weeks.
Decades old business in France has partnered with a food delivery startup to gain much needed ‘oxygen’ to survive the crisis.

Paris Rungis International Market
Largest Wholesale Fresh Food Market
(Dates back to 12th Century)

Pre-COVID 19
- Restaurants
- Super Markets
- Farmers Markets in Paris

Califrais

COVID 19
- Biggest demand shock in history with closure of restaurants
- Partnered with delivery partner, Califrais to deliver to homes
- Califrais repurposed its B2B platform to enable home delivery

“For lots of companies, this is the time to experiment, ... You do it because it allows you to keep things running. In this situation, it’s like oxygen.”

- Paddy Padmanabhan, Insead
Delivery Platforms are leveraging their technology, user networks, and data to expand to new verticals and power the shift to ‘insta-shopping’

“InstaShop comes to bridge the gap between the pharmacies and the community’s need in medicines”

“Smartphone makers in China including Huawei and Apple are turning to super fast deliveries and trade-ins at the door of customers.”
Hyper-local 3rd party retail networks are proving valuable to deliver products and services in Philippines

Typical Non-Metro Customer Journey to Bank in Philippines

3 – 6 hours

Coronavirus: how cash-mad Philippines learned to love digital money thanks to Covid-19

South China Morning Post
May 2020

Digital Payment Co. Leveraged Hyperlocal Network

PayMaya, truemoney, POSIBLE

50,000+ Sari Sari Shops

www.mytucnifrontier.com
Telemedicine platforms saw a sharp increase in uptake across the globe.

**North America**
- Amwell
- TELADOC
- Dr. on Demand

**UK**
- AccuRx
- Klara
- TeleClinic

**Europe**
- halodoc
- HiDoc

**China**
- On-Demand Consultation

**SEA**
- babylon
- 98point6

**GEN 1 Telehealth Platforms**
- Doctors
- Patients
- Pharma
Integration of IoT, AR, and Machine learning solutions will make effective remote health and telehealth solutions a reality.

GEN 2 Telehealth Platforms

• Physical Therapy
• Stress Management
• Pain Management
• Cognitive Therapy
• Aging Therapy
• Respiratory Recovery
• Chronic Illness Management (Diabetes)
• Remote Diagnostics
Israel’s leading hospital leveraged startup TytoCare’s remote diagnostics solution to monitor COVID-19 exposed patients.
Employee Sharing

Out of Work:
- Restaurant Workers
- Retail Staff
- Taxi & Ride-Hailing Drivers
- Factory Workers
- Airline Staff
- Hospitality

In Demand:
- Delivery Drivers
- Supermarket Workers
- Warehouse Workers
- Call Center Workers

Lockdown
Post-Lockdown
Will the Pandemic Push Knowledge Work into the Gig Economy?

by Sameer Hasija, V. “Paddy” Padmanabhan and Prashant Rampal

June 01, 2020

How to Determine If Knowledge Work Lends Itself to “Gigification”

To better gauge the future of the gig economy for knowledge work, analyze the work at the task level.

1. Unpack knowledge work into a set of tasks.
2. For each task:
   - Is this codifiable?
   - Can there be delay between value creation and consumption?
3. Can task be done remotely (as evident during pandemic)?
   - Yes → Tasks will need reengineering of organizational processes to facilitate transition to remote working.
   - No → Slower adoption and growth of task gigification
4. Accelerated adoption of task gigification
5. Slower adoption and growth of task gigification
6. Less amenable to task gigification

Source: Sameer Hasija et al.
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Resources + Business Processes

Flexibility, Speed, Anticipatory Intelligence, Growth & Profitability
Common Theme—Platform Tech Stack

- Cloud Computing
- Machine Learning
- Big Data Infrastructure
- Software (Mobile) Applications
- Application Programming Interface (APIs)
Should firms rethink their business model based on the crisis experience?

**Simplified Evaluation Framework**

- Will the tech adoption/process change continue to add value post crisis? **NO** → Temporary
- Will it involve high costs? **NO** → Permanent adoption
- Can a firm swiftly & efficiently switch on the tech/process on need basis? **NO** → Invest in Platform Tech Stack that allows for integration of on-demand access.
- Will persist as real option, may gradually lead to full scale adoption
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