



The Digital Imperative

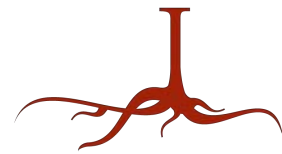
ALSMA - Heads of Delegation Meeting
Melbourne, April 2014

RADICLE
CONSULTING



***“If the rate of change on
the outside exceeds the
rate of change on the
inside, the end is near.”***

Jack Welch
Former Chairman & CEO, GE Corp.



**JAN
2014**

ASIA-PACIFIC

3,882,702,949

TOTAL POPULATION



44%

URBAN

56%

RURAL

1,255,745,291

INTERNET USERS



32%

INTERNET PENETRATION

969,583,240

ACTIVE SOCIAL NETWORK USERS



25%

SOCIAL NETWORKING PENETRATION

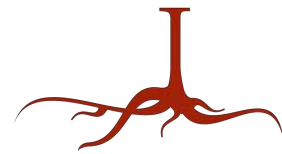
3,347,580,701

ACTIVE MOBILE SUBSCRIPTIONS



86%

MOBILE SUBSCRIPTION PENETRATION



**JAN
2014**

APAC GLOBAL SHARE

SHARE OF GLOBAL
POPULATION



54.7%

SHARE OF GLOBAL
INTERNET USERS



47.5%

SHARE OF GLOBAL
SOCIAL MEDIA USERS

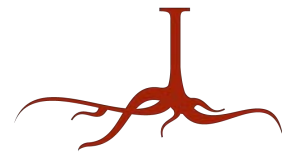


52.2%

SHARE OF GLOBAL
MOBILE USERS

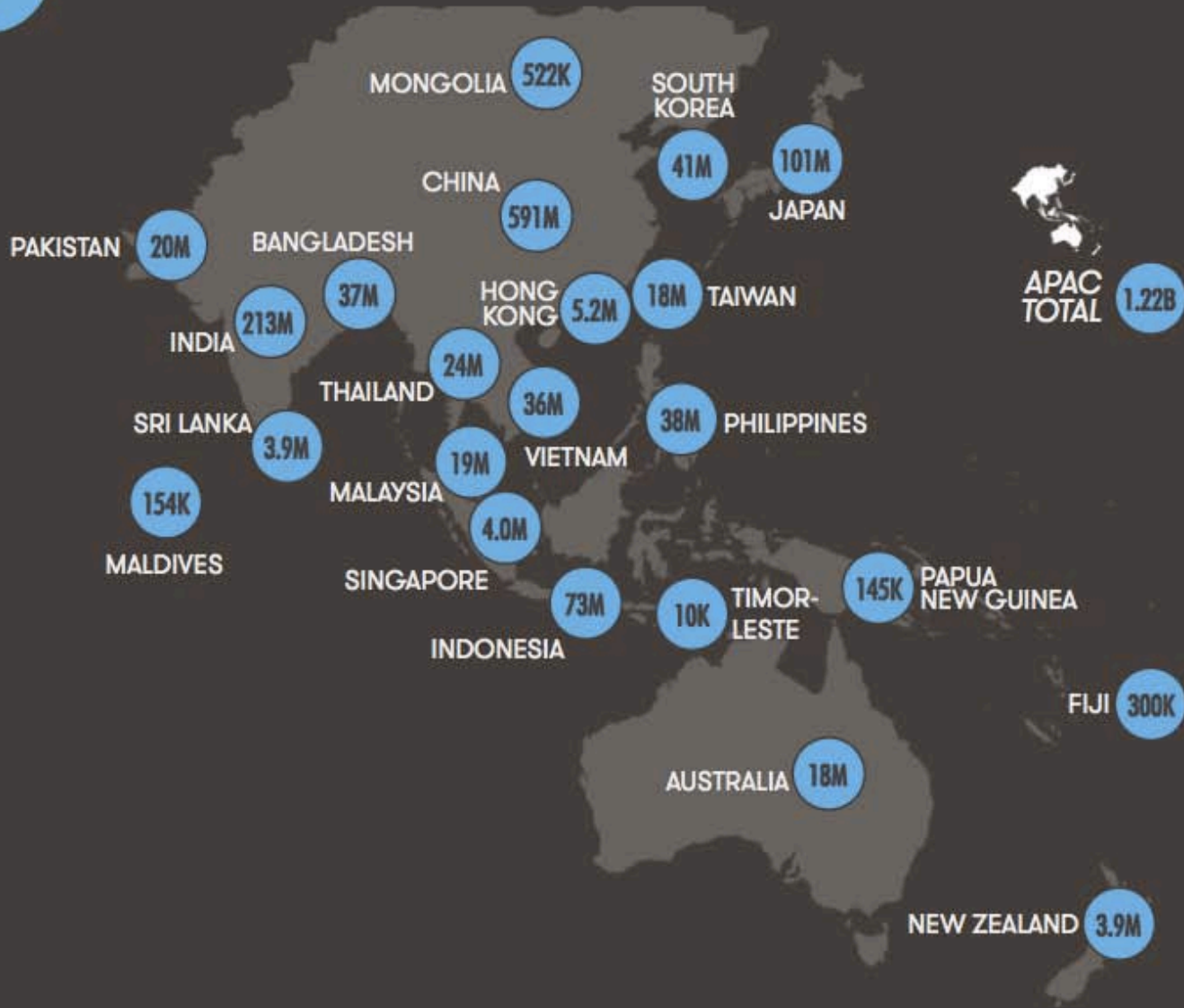


47.6%



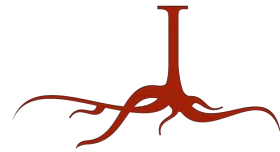
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INTERNET USERS IN APAC



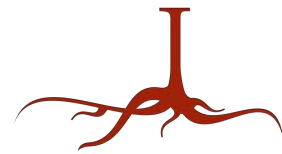
We Are Social – 2014 Asia-Pacific Digital Overview

Sources: US Census Bureau, InternetWorldStats, CNNIC, IAMA, Tencent, Facebook, Vkontakte, ITU, CIA



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MOBILE SUBSCRIPTION PENETRATION



A Cursory Tale...



Today...

- Aus\$1.0bn revenue
- Market Val. = Aus\$650m
- Recently acquired by VCs

4 Years Ago...

- Aus\$2.4bn revenue
- Market Val. = c.Aus\$6-8bn
- Telco owned





Focus



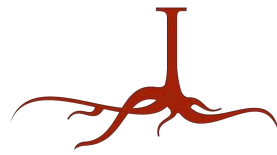
Measurement



Legacy



Fear



 Capgemini Consulting



DIGITAL TRANSFORMATION: A ROADMAP FOR BILLION-DOLLAR ORGANIZATIONS

FINDINGS FROM PHASE 1 OF THE DIGITAL TRANSFORMATION
STUDY CONDUCTED BY THE MIT CENTER FOR DIGITAL
BUSINESS AND CAPGEMINI CONSULTING



 Capgemini Consulting



The Digital Advantage: How digital leaders outperform their peers in every industry



Transform to the power of digital



Digital Maturity

Digital Intensity

Technology-enabled initiatives in:

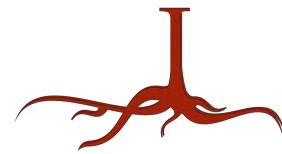
- Customer Engagement
- Internal Operations & Processes

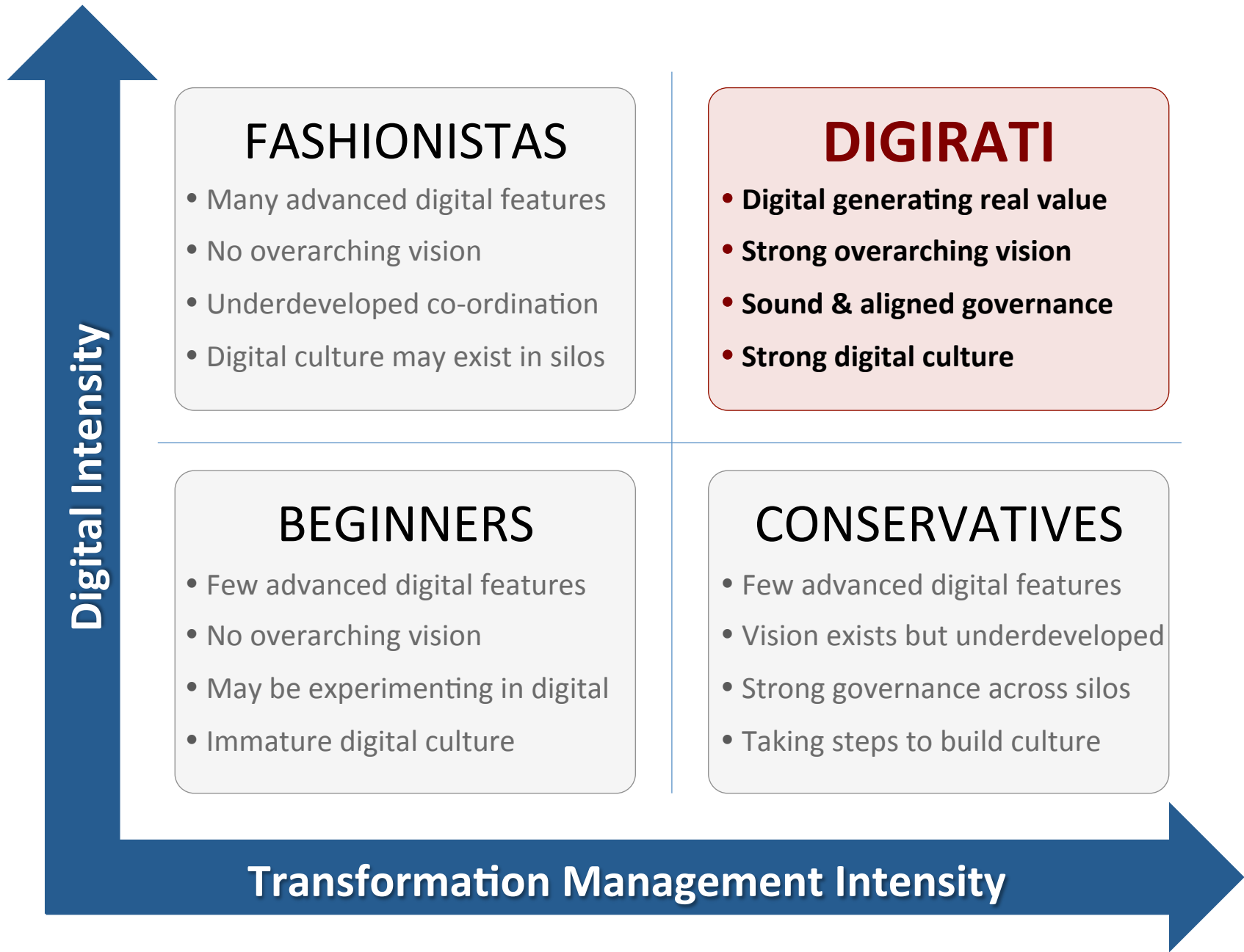
+

Transformation Management Intensity

Leadership capabilities including:

- Vision
- Governance
- People Engagement
- IT-Business Relationships





Internal Collaboration



SATISFACTION



- **WOW!!!**
- **THRILLED**
- **HAPPY**
- **SATISFIED**

Customer Experience

Social Media

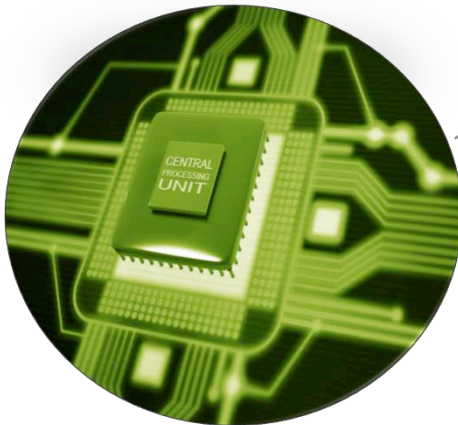


DIGIRATI
Domains of Excellence

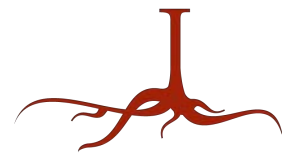
Customer Analytics



Process Digitization



Mobile



Operational Processes

Customer Analytics



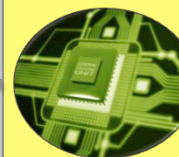
- Target marketing
- Segmentation
- Personalized comms
- Optimized pricing

Internal Collaboration



- Internal networks
- Knowledge sharing
- Working practices – anytime, anywhere

Process Digitization



- Real-time monitoring
- Electronic p.o.s.
- Seamless BI
- Supplier managem't

Customer-Facing Processes

Social Media



- Promote & sell
- Monitor reputation
- Customer service
- Build communities

Customer Experience



- Personalization
- Self-service
- Customer support
- Channel consistency

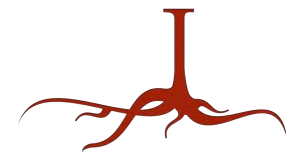
Mobile Channel



- Promote & sell
- Customer service
- Extend reach of brand & products

Data Integration

- Customer Data
- Other data (finance, supply-chain, operations)



The Digital Economy demands a completely new set of Business Drivers and Key Performance Measures...

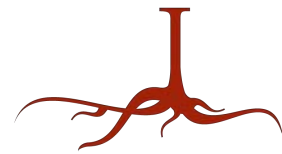
Old World
Mostly Internal Measures

- Revenue
- EBITDA
- Market Share
- Stock Price
- Dividend
- Internal Processes
- Employee Turnover

-vs-

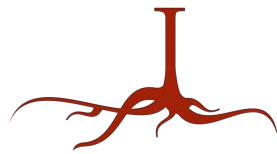
New World
Mostly Customer Measures

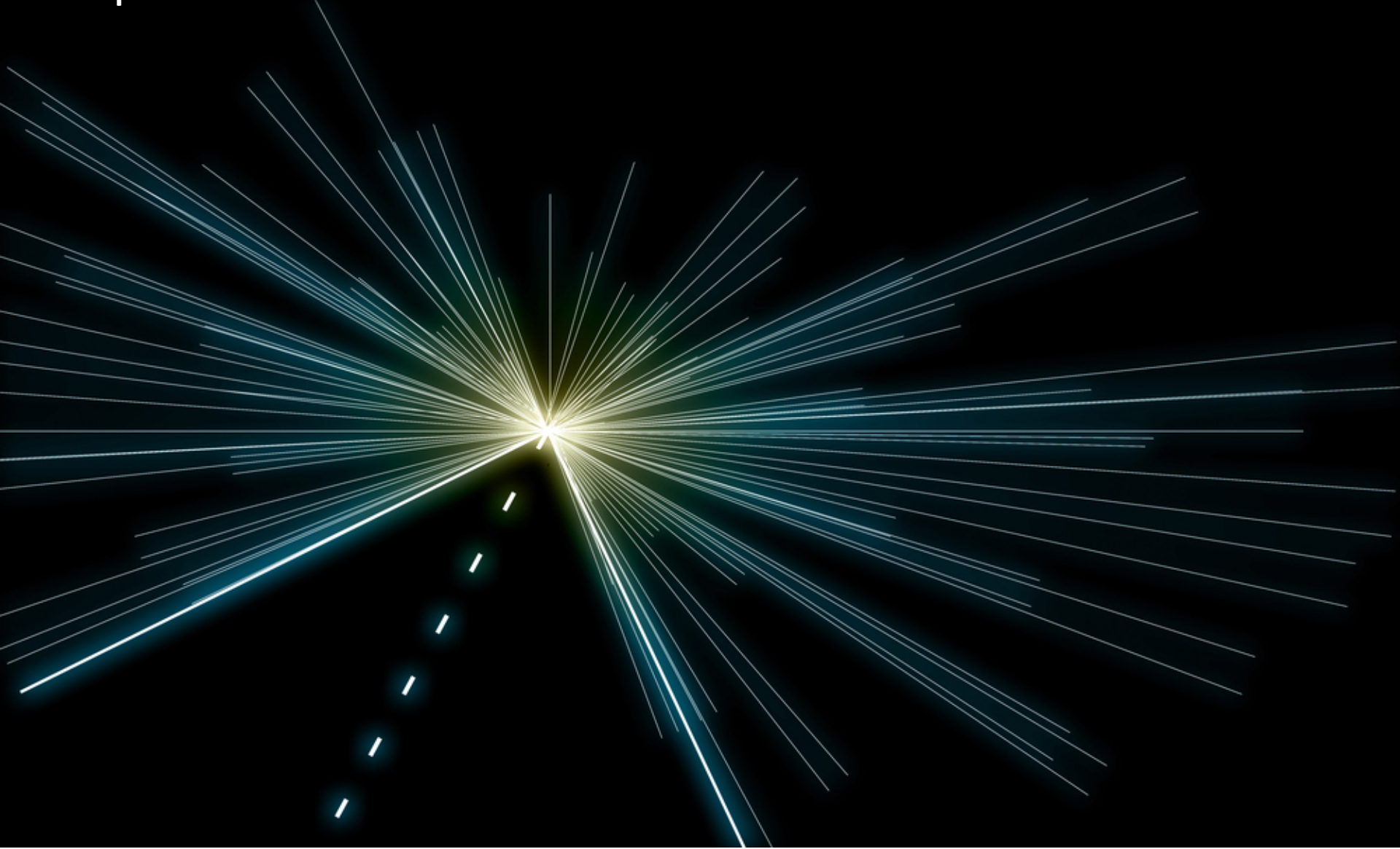
- Retention
- Satisfaction (NPS)
- Reputation (Social)
- Processes – speed/efficiency
- Quality – accuracy etc.
- Digital Intensity
- Employee Engagement



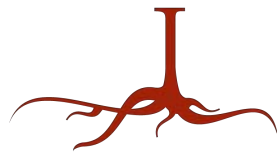
A tablet with a black bezel is centered on a light-colored wooden surface. The screen of the tablet is white and displays the text 'A Recipe for Successful Transformation' in a bold, dark red font. To the left of the tablet, a wooden pestle with a rounded end and a circular base is partially visible. The background is a blurred wooden shelf with various items.

**A Recipe for
Successful
Transformation**



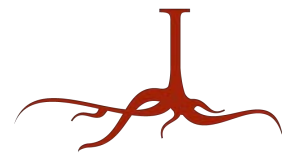


1. Have a Clear Vision & Purpose



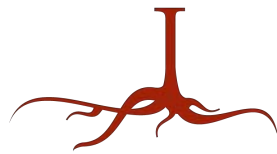


2. It must be Customer-Centric



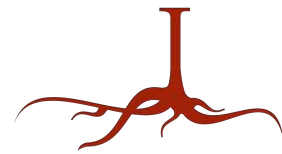


3. Strong (Visionary) Leadership



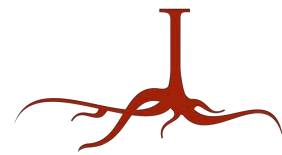


4. Limit Your Core Strategic Themes





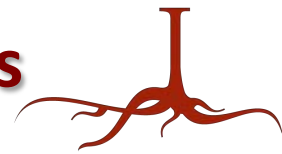
5. Compelling Value Proposition



A Recipe for Successful Transformation

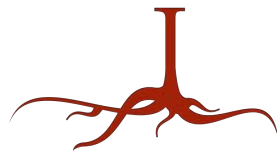


6. Seamlessly integrated Infrastructure & Processes



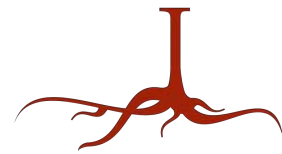


7. Openness to Partnerships & Alliances



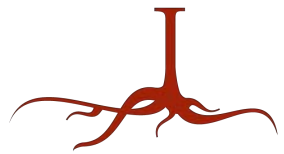


8. Strong Innovation Culture





9. Invest in People & Talent

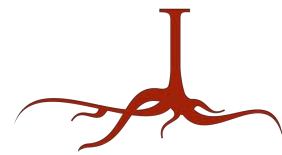


A Recipe for Successful Transformation

“We are what we repeatedly do.
Excellence, then, is not an act,
but a habit.”

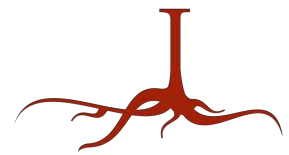
Aristotle
Greek
Philosopher
384-322 BC

10. Excellent Execution is Everything!





The iGeneration is now graduating...





“Skate to where the puck is going to be, not where it is right now.”

Wayne Gretzky

(Generally acknowledged as the greatest ever hockey player)

