



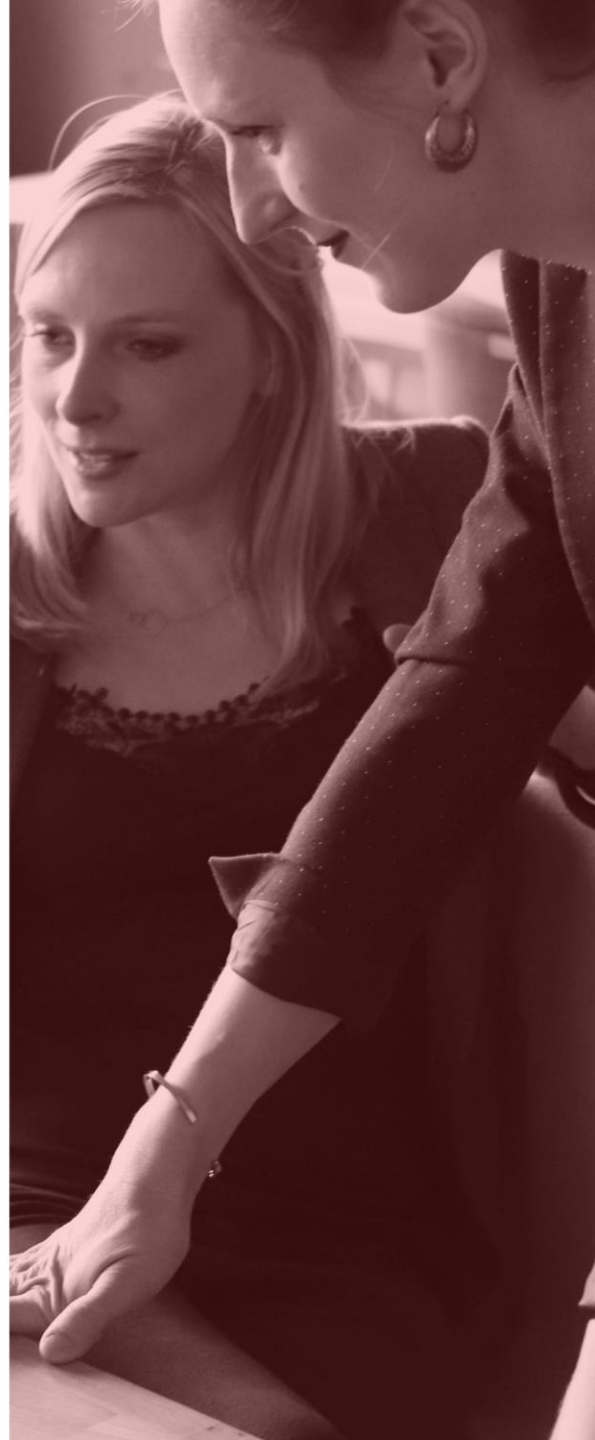
**Welcome**

**One Consulting Firm**

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Consulting Led Performance  
Improvement

*One Consulting Firm*



**LEARNING TOGETHER  
TO MANAGE BUSINESS  
IN COVID-19 TIMES**

**Webinar Series**

Impact on

**DEMAND AND OPERATIONS**

Retail, Fashion and Consumer Goods

# TODAY'S WEBINAR IMPACT ON DEMAND AND OPERATIONS

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- How will the demand shape up in India? What new opportunities will emerge?
- What actions and skills are required in restoring and then stepping up the operations?
- How would the retail channels evolve? Would there be a substantial shift towards e-commerce and home deliveries?
- What can be learnt from Chinese and Asian players who are ahead of the curve?

# PLEASED TO ANNOUNCE THE SECOND WEBINAR

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Friday, APRIL 17<sup>th</sup>, 1600-1700 Hours IST

- How would the consumer behaviour change? Will they come out of the hibernation? Which categories are likely to be impacted and which will grow?
- How would the customer engagement change?
- Would digital/home delivery become the mainstream channel?
- What changes will be required in sales & distribution capabilities?

We have the experts to discuss:

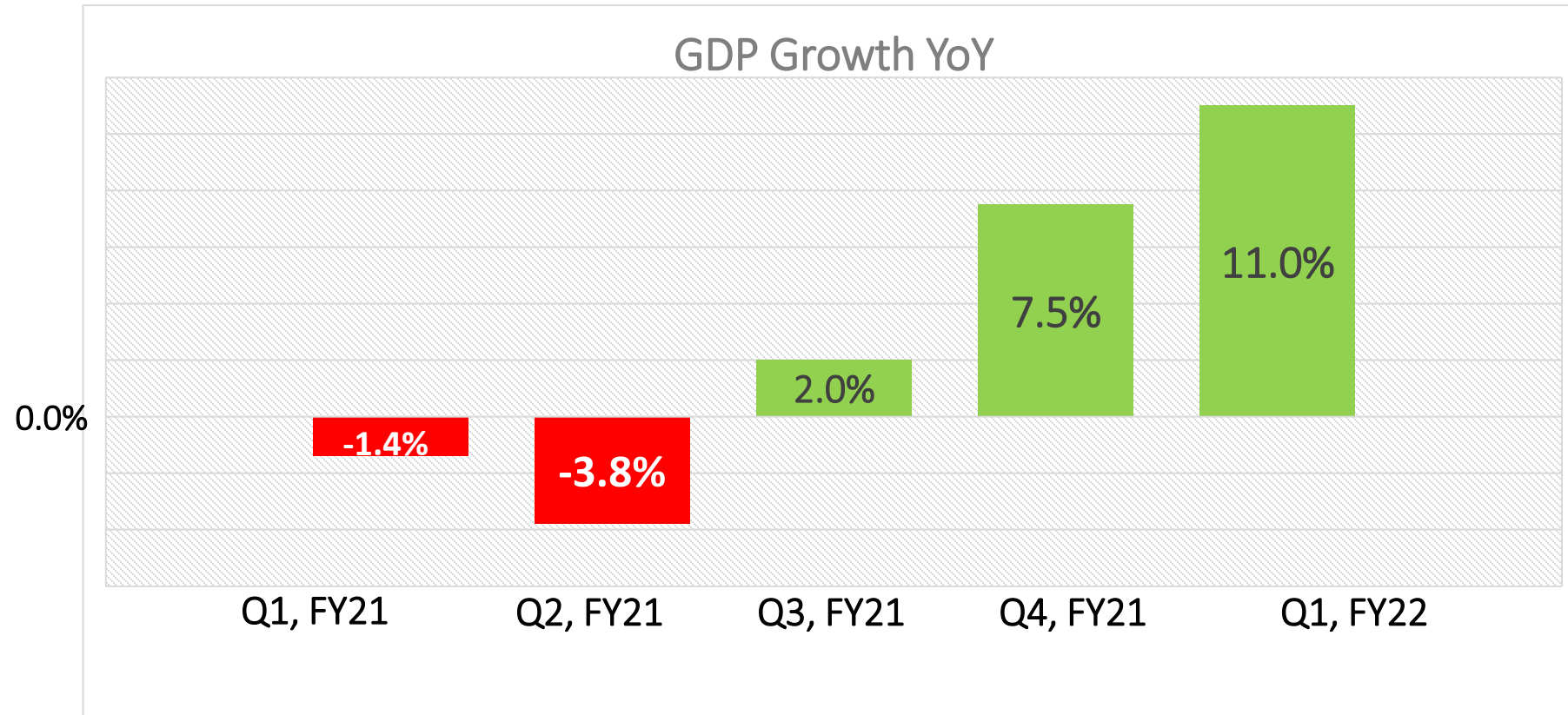
- Puneet Khanna, The Apparel Group Dubai, Head of Footwear Business GCC
- Vikram Mahaldar, Managing Director of OCM, India
- Anil Rajpal, One Consulting Firm as Moderator

# GDP GROWTH PROJECTIONS

S.No	Forecast by	GDP Growth FY21
1	ADB	4.0%
2	S&P	3.5%
3	ICRA	2.0%
4	Goldman Sach	1.6%

Huge variations in Estimates and also changing by the Day

# RECOVERY TRAJECTORY



Source : Goldman Sachs projections March end 2020

Likely recovery Q3 onwards.

# IMPACT ON DIFFERENT CATEGORIES ON PRIVATE CONSUMPTION

S.No	Private Consumption Categories	% Share
1	Food & Beverages	26.3%
2	Alcohol, Tobacco, Narcotics	1.9%
3	<b>Clothing &amp; Footwear</b>	5.8%
4	Water, Housing ,Electricity	13.7%
5	<b>Furnishing, Household equipment</b>	3.2%
6	Health	4.5%
7	<b>Transport</b>	17.6%
8	Communication	2.6%
9	Recreation and Culture	0.8%
10	Education	4.0%
11	<b>Restaurants And Hotels</b>	2.2%
12	Misc. goods and services	17.2%

# HERE IS HOW YOU CAN RESTART

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## 1 PURPOSEFUL LEADERSHIP

- Wake up call by Nature : Now we have to make a choice
- Dream for the new vision : Business in harmony with nature over reckless growth
- World leaders need to show the Path: WEF, Satya Nadella, Narayan Murthy, Bill Gates, Warren Buffet define this Vision and new KPIs
- Compassion Over Capital
- Positivity Over Panic
- Faith on Human Resilience

## 2 NEW NORMAL

- Understand and accept the new normal, its nuisances and uncertainties
- Different plans for different phases : lockdown, restart and recovery
- Adapt to meet the radical changes in consumption, retail channels and operations
- Extensively communicate with your employees, customers and partners. Strengthen your digital presence
- Conserve cash
- Past crises have proven that strong brands recover faster

## 3 UPSIDE OF COVID

- Don't let the crisis go waste. Find the silver lining
- People are willing to collaborate more than ever; Innovate
- Enough not being spoken about the positives and the possibilities

Examples of opportunities and innovation

- India can emerge as the World's Hub for bio medical and agri- needs
- Domino's selling grocery product, M&M and Maruti making ventilators at extremely affordable costs
- A small company in India innovating the most affordable testing kit for COVID

# HERE IS HOW YOU CAN RESTART

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## 4 LEVERAGE ECOSYSTEM

- Don't consider yourself alone; boundaries are getting shattered
- Great time for innovation and for discovering new ways of running the businesses

## 5 BUSINESS CONTINUITY PLANS

- A black swan event is possible. Scenario planning from COVID learning will help
- A lot of companies do not have Business Continuity and Disaster Recovery Plans

## 6 PATIENCE

- 6-12 months of patience, careful navigation and supporting each other
- Create a new foundation
- Recovery will follow
- Don't forsake long term vision and capabilities during the short-term survival phase



**SPEAKERS TALK**\_\_\_\_\_

# KEY INSIGHTS FROM SPEAKERS

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- There is a serious and immediate challenge for agriculture supply chain especially during the current harvest and sowing season despite the demand still being intact
- A platform approach is needed to tackle problems, just like the India stack has made the payments and transactions less of a bottleneck at present. Thus, technology will be key
- A re-engineered supply chain for food and other sectors is needed that is more efficient, adaptable and transparent. For e.g. the 30% wastage in the agricultural supply chain will need to be seriously addressed now
- Consumer behaviour will change towards digital first across all consumer sectors such as consumer goods, education, healthcare etc
- It's a great time for structural reforms and it will be a collaborative approach between government and private sector
- SMEs may be under a lot of stress due to the current crisis and high cost of capital
- Start-ups will need to get into the discipline and sustainability mode and not just focus on growth
- there will be trend of localisation besides reverse globalisation
- Kiranas are resilient and will survive with opportunities for innovation in managing tax, finances and operations



Hemendra Mathur,  
Venture Partner, Bharat Funds  
US \$100M Agri & Food Supply Chain

## KEY INSIGHTS FROM SPEAKERS

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- Business will have to plan for best case, worse case and probable case scenarios. Different sectors will have different approaches
- This is an opportunity to reboot and innovate for a lot of sectors. Consumer finance for example will look at a lot more automation
- For leaders focus on cost and employee learning will be key take-aways
- Liquidity is now present with the banks and consumer finance can help revive demand as long as risk assessment can be finetuned
- September onwards may provide the right conditions for the revival due to wane in Covid-19 and on-det of festival and marriage seasons
- India due to low labour cost can host some of the business moving partially out of China where the government can provide the right support



Bimal Rawat,  
Head Consumer Finance,  
Muthoot Group

## KEY INSIGHTS FROM SPEAKERS

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- Pharma and health sectors are theoretically operational as essential products and services. However, health risks to employees and customers and supply chain issues are a major challenge. Overall, the sales are dramatically down.
- The manufacturers of pharmaceuticals have some stock of APIs but sourcing from China needs to open up. The supply chain within the country needs to get streamlined.
- Retailers of all hues are severely impacted. Government has to take an active role going forward to support businesses and the social sector. Health only gets 1.6% of GDP spending, for example.
- In the near term, absence of seemingly non-essential services and products such as repairs, stationary will be a challenge because operations cannot easily run without them
- Protection and care of employees managing operations is important
- In the near term discretionary spend will take a back seat but very soon all consumption including luxury purchases could revive



Rahul Chadha,  
CEO, Fortis Health World,  
Health & Beauty Services

## MODERATOR'S SUMMARY

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- Indian GDP growth estimates vary between 4 - 1.6% for FY 2021
- Its very difficult to zero on a single number, but a sharp recovery is expected by Q3
- Firms and Individuals are innovating to survive and bounce back
- Firms will have to live with a new normal in the next few months and beyond
- Government support and collaboration with the industry will be crucial
- Those who survive will bounce back stronger and have opportunities to excel in the long term with strong leadership and the right approach



Anil Rajpal,  
CEO-Founder  
One Consulting Firm

Thank you

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PERFORMANCE IMPROVEMENT**

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