

The Future of the Digital Economy

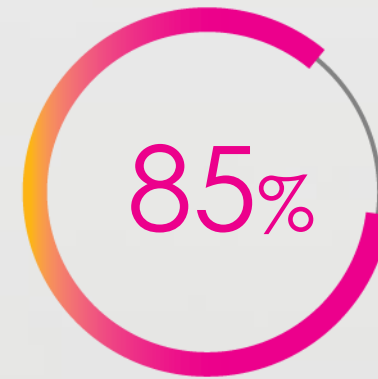
Is it Really Digital?



Renato Osato
VP Customer Business Executive

It's a digital-first world

By 2020, customers will manage



of their relationships with enterprises
without interaction with a human

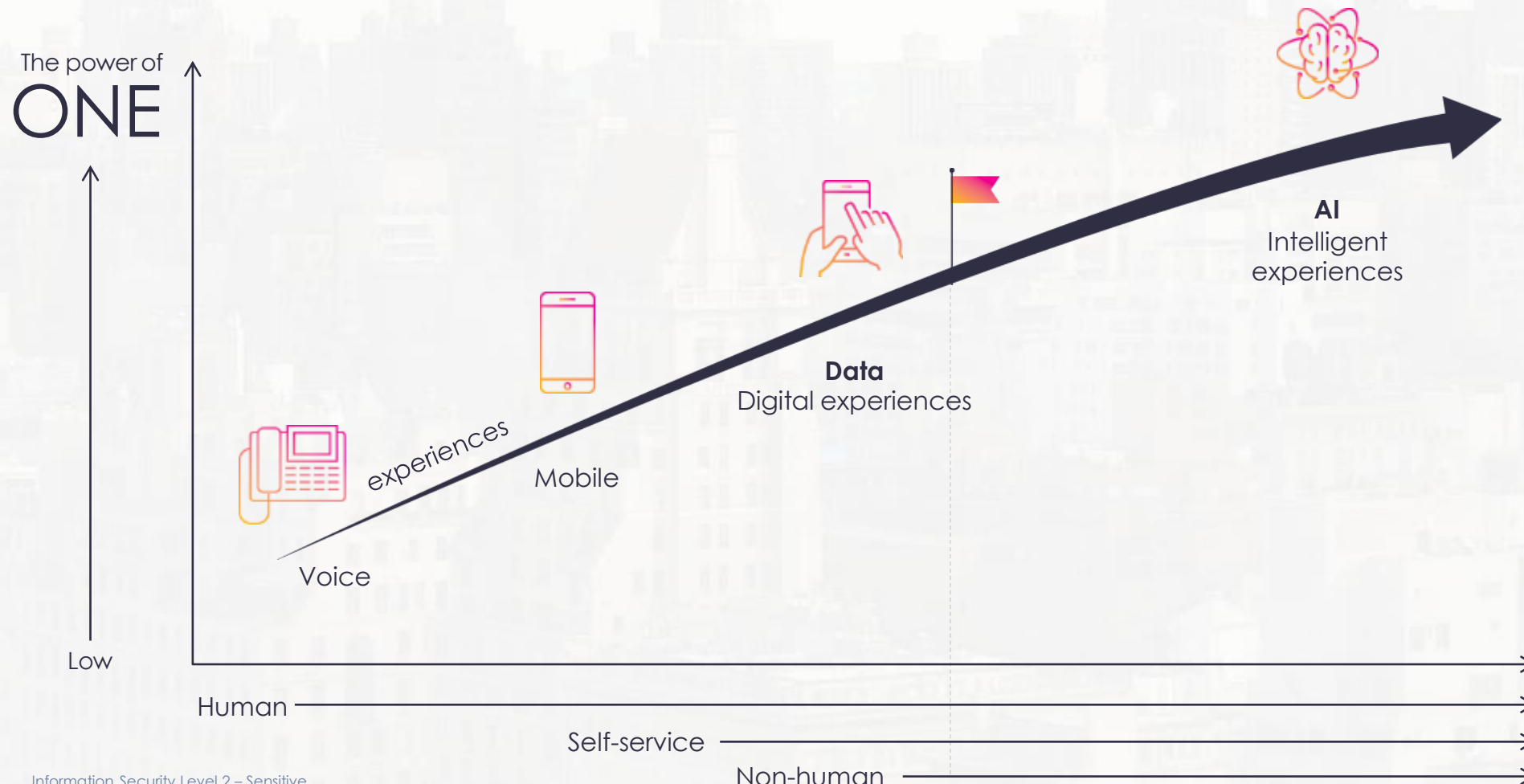
**and the average person will
have more conversations with
bots than with their spouse....**

Source: Gartner



Fourth wave of disruption

Welcome to the era of cognitive intelligence



3 forces shaping communications market

Digital technologies

- Cloud
- Open APIs
- Service creation
- Microservices
- AI
- Analytics
- Big data



intelligent
DSP



Digital customer

- In control
- Always connected
- Channel of choice
- Social
- Self-service
- Apps
- Consumer or enterprise

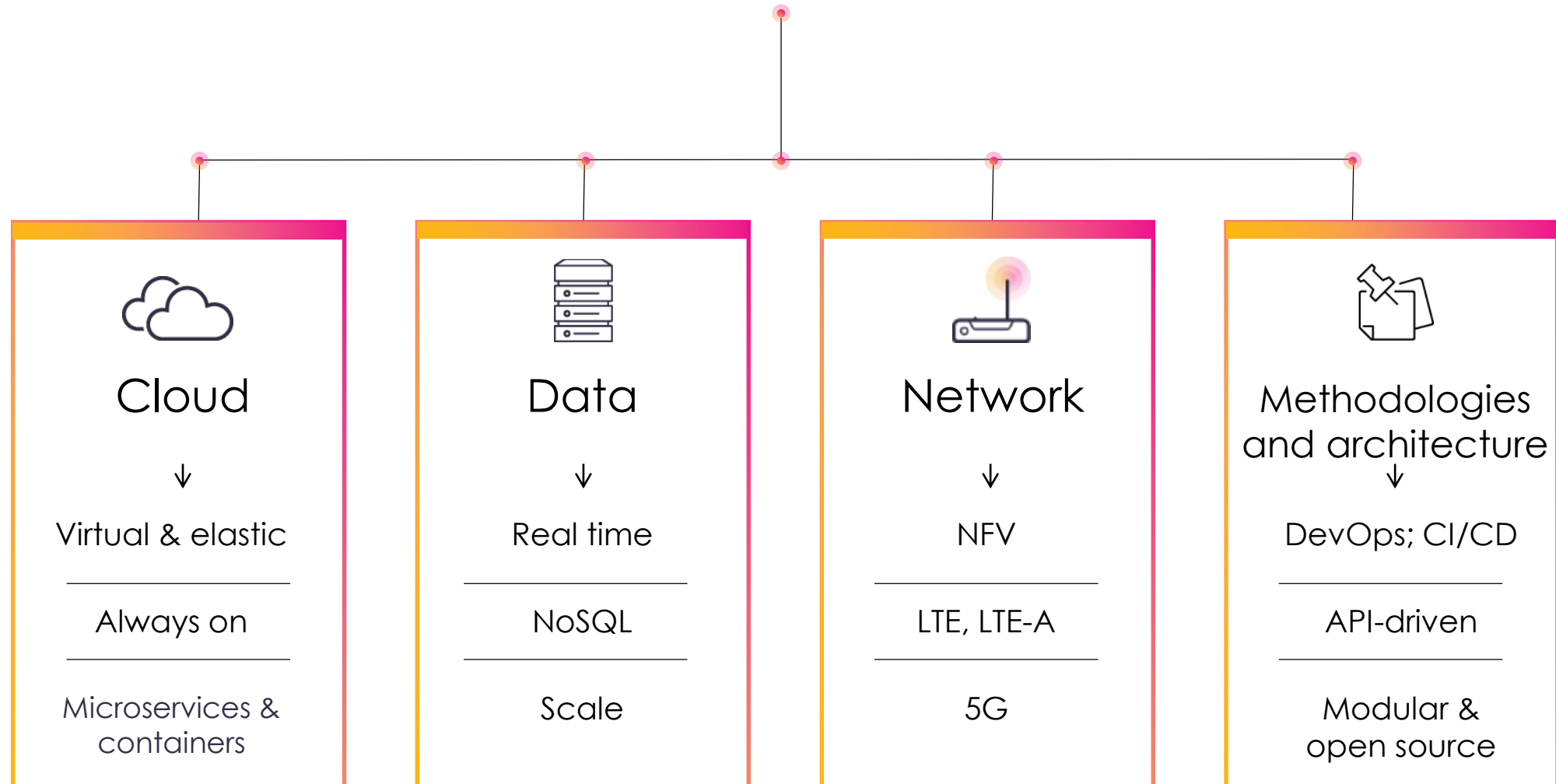


Digital economy

- OTT
- Content
- IoT
- Financial services
- Advertisement
- Healthcare

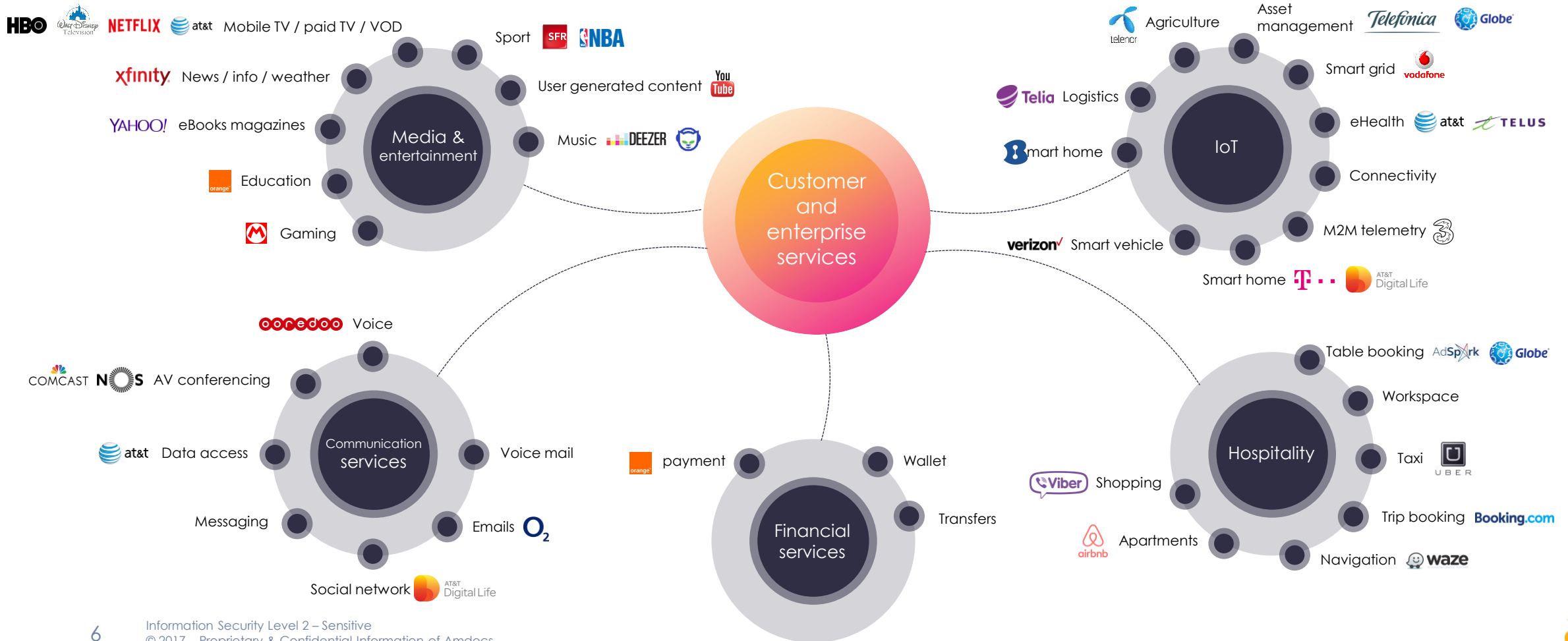
Digital technologies

Open and scalable technologies enabling business and customer transformation

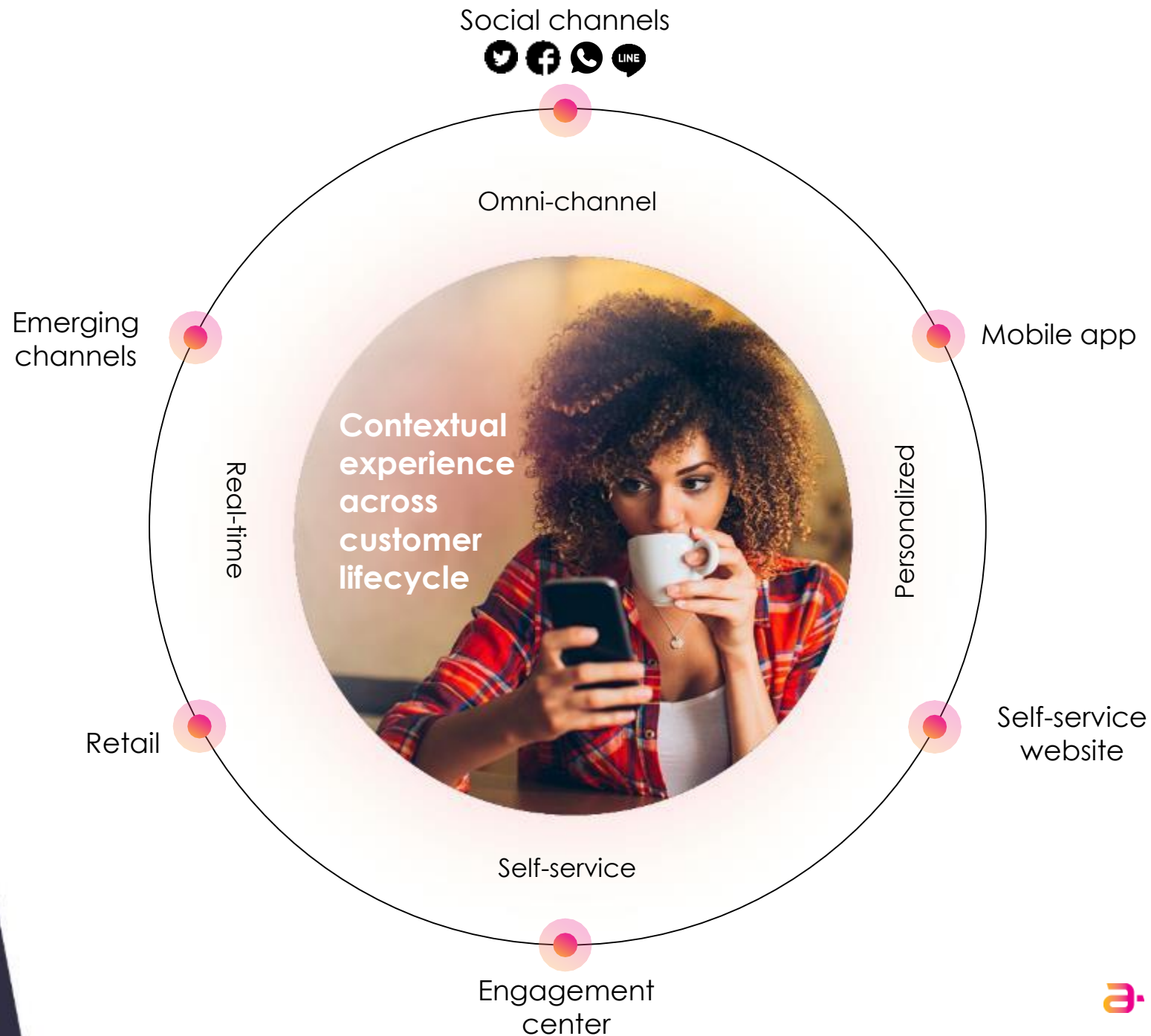


The digital economy

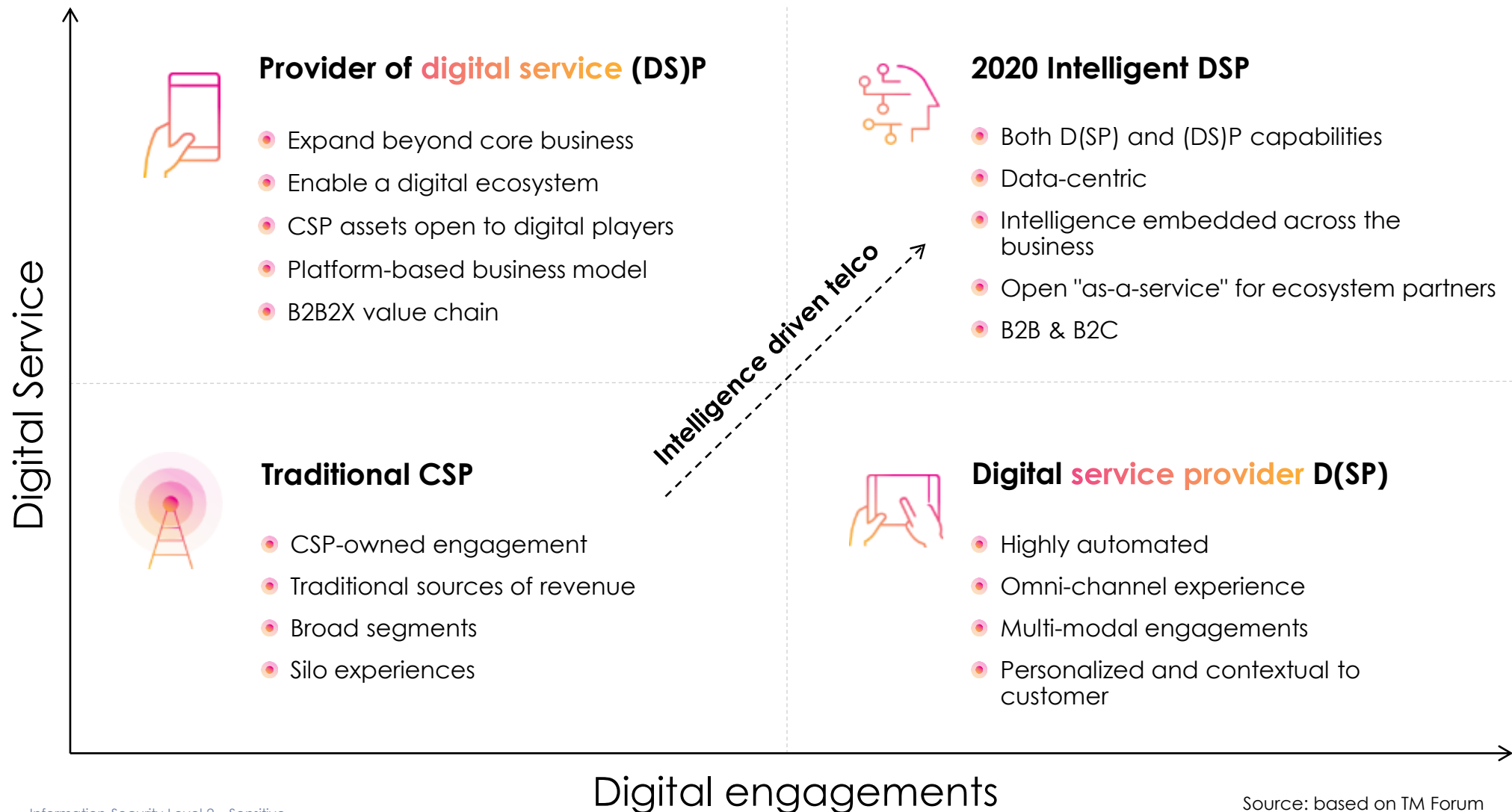
50% of CSPs' new digital services originate from partnerships and investment



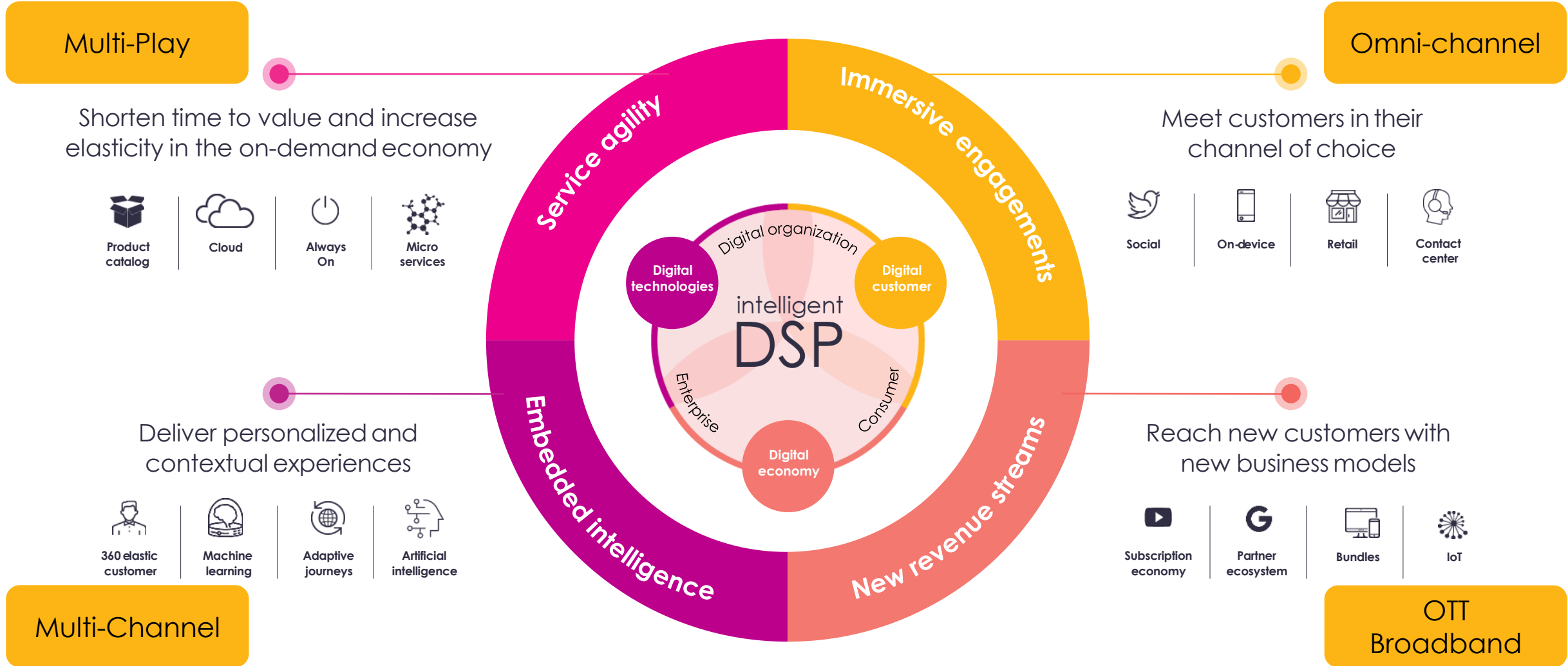
The digital customer



The 2020 intelligent digital service provider (DSP)



The journey to intelligent DSP in our region

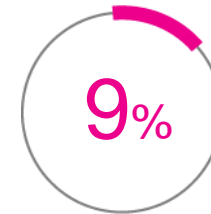


Service providers enjoying the rewards of Digital



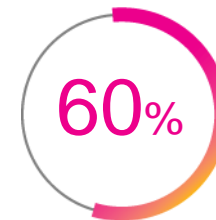
13-14 pts
higher NPS

- +13 for fixed services
- +14 for mobile services
- Digital-only journeys have 19% higher customer satisfaction rate



Revenue
growth

- +51% shorter time to market

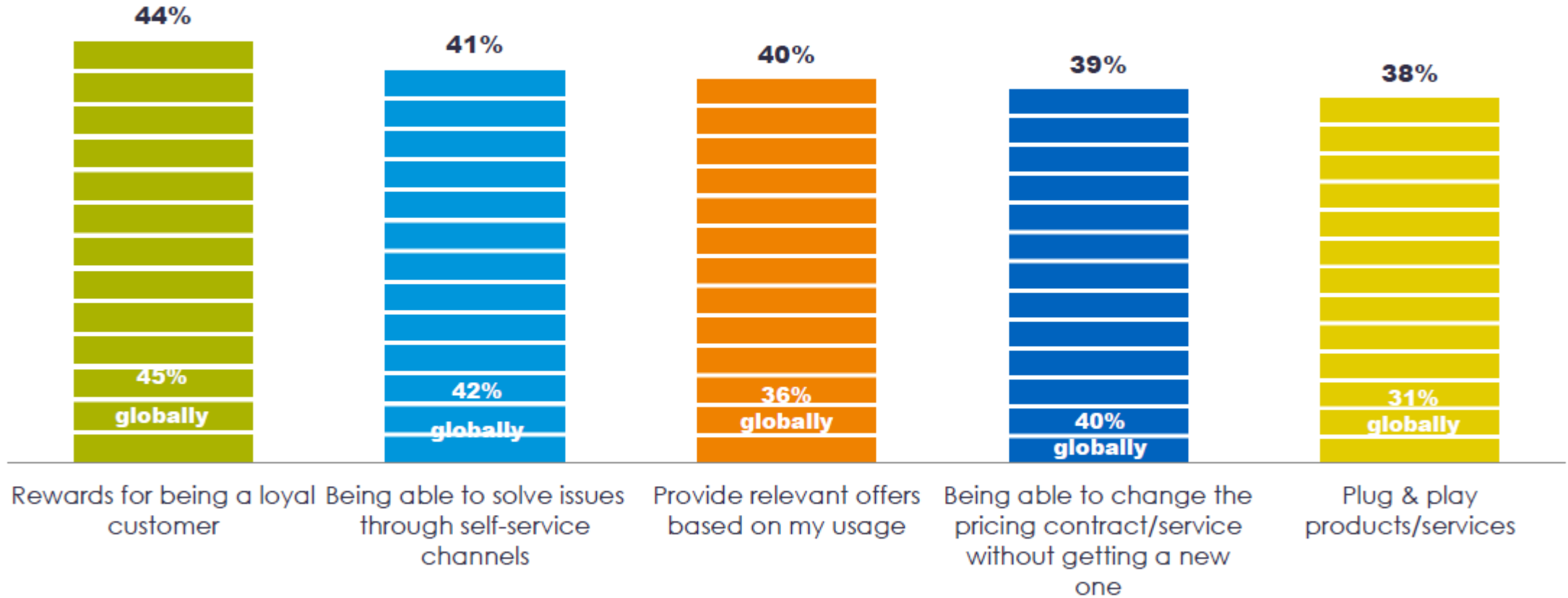


Efficiency

- Reduced processes: standardization across channels and products

Good retention and loyalty tools will keep more customers on board and new customers longer

Q. Which are the three most important factors that will ensure your loyalty?



In a such rapidly changing world, it is essential for service providers to find new ways to engage and reward their customers

Real-life examples



84 markets where
AT&T Digital Life® is
available
January 2017

The logo for Telefonica, featuring the word "Telefonica" in a blue, cursive script font with a horizontal line underneath.

€4.8B + 14% YoY
Telefonica's Digital
Services 2016
revenues

The logo for Singtel, featuring the word "Singtel" in a bold, black, sans-serif font with five red dots of varying sizes above the letters "i", "n", and "t".

\$454M
Singtel Group Digital
Life 2016 revenues



75% of Vodafone
Group's customer
interactions are
already **digital**

Explosion of new services



Complexity of systems and processes



Lack of funding



Lack of available skills



Lack of management support



Challenges hindering digital transformation

Is it only Digital?

52%

Say that they are just starting implementation, but it's still early

"Culture eats strategy for breakfast..." Peter Drucker





When & Where:

**Wednesday July 19, 1-6 pm, Fillmore 9 meeting room
Hard Rock Hotel, Punta Cana**



Thank you

