

REINVENTADO LA OPERACIÓN MINORISTA DESPUÉS DEL COVID-19

REIMAGINING RETAIL OPERATION AFTER COVID-19

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Resumen

La crisis económica y humanitaria global ocasionada por el COVID-19 está transformando el modo en que las personas viven, trabajan y piensan, requiriéndose que se reimagine la operación del retail en una situación de “tomar o morir”. En la nueva normalidad, nada será igual a lo que era antes.

Se propone una organización con consciencia social, más empática con los clientes y empleados, y centrada en sus resultados, para lo que deben seguirse aspiraciones más altas en experiencia y viaje del cliente, y en cuidado y conexiones emocionales con las comunidades a las que se sirve.

La nueva normalidad se adaptará con nóveles modelos operativos, digitalización, innovación, experiencia omnicanal, equipos cross-funcionales y condiciones de seguridad. Bajo estas circunstancias, la tecnología se constituye en un impulsor clave para remodelar experiencias del cliente, dentro de la tienda y en la oficina, en la búsqueda de nuevas alturas en mejoras en el rendimiento y servicio. Agilidad, flexibilidad, fiabilidad y accesibilidad representan las nuevas bases para el período que viene.

La hipótesis de este trabajo –que fuera corroborada- indica que las operaciones de retail deben ser reimaginadas para la próxima normalidad, mejorando la experiencia del cliente y consecuentemente- el rendimiento y los resultados de las empresas.

Se ha realizado un estudio bibliográfico, con un trabajo exploratorio descriptivo y una

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metodología cualitativa. Se ha utilizado un diseño no experimental y, dentro de ellos, transversal.

Palabras clave: retail; operación; COVID-19; experiencia del cliente.

Abstract

The global economic and humanitarian crisis caused by COVID-19 is transforming the way people live, work and think, requiring a re-imagination of the retail operation in a take-it-or-die situation. In the next normal, nothing will be as it was before.

It is proposed a socially conscious organization, more empathetic with customers and employees, and focused on P&L issues, for which are needed higher aspirations for customer experience and customer journey; and care and emotional connections with the communities that are served.

The new norm will be tailored with novel operating models, digitalization, innovation, omnichannel experiences, cross-functional teams and safety conditions. Under these circumstances, technology becomes a key driver to reshape the customer; in-store and office experiences in search of new heights in performance and service improvement. Agility, flexibility, reliability and reachability are new basis for the period to come.

The hypothesis of this study—which was corroborated- says that retail operations must be reimagined for the next normal, improving customer experience and, consequently, firms' performance and results.

It was performed a bibliographical study, with an exploratory descriptive work and a qualitative methodology. It was used a non experimental design and, among them, transversal.

Keywords: retail; operation; COVID-19; customer experience; customer journey.

Introduction

The COVID-19 pandemic has impacted abruptly on multiple industrial sectors and worldwide operations, proposing instant changes in a take it-or-die situation. But, industrial sectors have been impacted differently. IProfesional (2020) asserts that, in Argentina:

- The most affected are gastronomy, travel agencies, and hotels, and that technology and household items, too. Many retailers -who were not authorized to market through the Internet-, had to lower their blinds. Thus, only hypermarkets that commercialize these types of products could gain some ground. But anyway, the sale of electro and technological devices plummeted to historic levels.
- On the opposite sidewalk, all that is connected with online commerce does not stop growing. The e-commerce market share increased from 10% last year to 65% in 2020. The most purchased products were Smartphones, TV, video games consoles and notebooks; other products with reasonable sales were fridges and printers.
- The President of the Argentine Chamber of Electronic Commerce said that what e-commerce has progressed in the last two months, in a normal situation -without social isolation- it would have taken two years. Also, that there are firms that are getting prepared for consumers with discounted salaries, but others will want to indulge with their future purchases. In this context, supply-side adaptations are necessary.
- In the first weeks of the social isolation mandated by the Argentine government, it was seen that everything that was connected with essential items (supermarket, drugstore, and the like) exploited to stock up. Afterwards, electronics (refrigerators, electro, washing machines and irons) were the most requested, but clothing and footwear is expected to have an impact in the near future.

As it is revealed in different publications, e-commerce is progressing in US and other parts of the world, like Argentina, but physical stores are still needed for many consumers. In fact, Amazon is developing a brick-and-mortar network, proposing an omnichannel presence (Adhi et al., 2019 and IProfesional, 2020).

In this environment, the consumer behaviors and preferences become a key issue. In fact, Briedis et al. (2020) say that the pandemic is changing some consumer behaviors; for instance, consolidating shopping trips. As an example, in China the number of grocery's transactions declined 30% during the pandemic, and the average ticket increased 69%. In USA and because of hygiene considerations and e-commerce availability 17% of consumers are shifting their primary store, and many customers are trying new channels (online, pick up in store or grocery delivery).

In this sense and taking into account the new COVID-19 pandemic, McKinsey (2020) proposes new situations and elements that must be considered:

- *The new retailer role:* Shoppers continue to buy groceries and cleaning supplies and

food retailers will have a critical role to play in the near future, protecting employee health and safety, prioritizing in-store cleanliness, and dealing with demand surges and operational/supply chain shocks.

- *Matching the rapid demand, a challenge for retailers:* Consumer behavior shifts are observed. Paper towels, toilet paper and cleaning products doubled in sales, and other non essentials items like cosmetics and office supplies plummeted.
- *Changes in consumer attitudes:* they are considering well-being through healthy eating and exercise, and leaving alcoholic beverages and salty snacks.
- *The privacy imperative:* consumers are more careful about sharing data and firms are learning how to handle this imperative, becoming a point of differentiation and competitive advantage. In addition, some industries -like financial services and healthcare- are viewed as trustworthy for consumers, more than others.
- *Investment in machine-learning platforms:* For retailers, it is important to protect their customers and employees' health, stay updated with local demand and rethink their business model to go along global shocks. In this way, it is fundamental that investments should be directed in machine-learning platforms -that may help on better demand forecasts- and on e-commerce channels.
- *Consider the new vulnerable people:* There is a huge demand for food by newly vulnerable people across wealthier nations as the crisis has turned into one of food scarcity for the first time.

From another perspective, Dalrymple and Dolan (2020) put their eye on customer experience, saying that looking forward to the next normal consumers are demonstrating their preferences to firms that deliver great services while reducing risks along their journey. In more detail, they add that:

- *Firms are going through a rapidly evolving context.* Initially, many tackled the lives and livelihoods but now the focus is on a new contactless engagement between companies and customers, rebuilding human experiences among stakeholders that will differentiate in the market and build customer loyalty again.
- *New policies and processes are needed.* It requires instilling an agile operation to reopen, and proceed with their core business and additional opportunities in a safety manner.
- *It is required to work across silos* to deliver end-to-end customer and employee solutions and experiences, maintaining the value of their brands. To do that, it is proposed a data-driven perspective called IDEA (*I*dentify interactions, *D* Diagnose and prioritize risks, *E* develop and *E* execute solutions, and *A* adapt and sustain). Over time, this framework can flex to include more human elements, while now and after it provides structure and rigor to individualize and assess the intensity of risks, creating evolving solutions with the external context.

The first step in applying IDEA is connected with interactions among customers and employees, which -in every industry- are always necessary and imply a risk (i.e.: checking in at a hotel, attending medical offices, in-home service visits and boarding queue). Also, the space allotted to the activity must be taken into consideration.

The second step refers to diagnose and prioritize risks for customers and employees, for which mapping their journeys becomes a key issue. Are cited three in-person interactions that pose a risk: internal tasks/processes, goods transfer and, finally, service provision. It is remarked that risks are seen differently from customer and employee perspective: when a customer pays a hotel with a credit card it represents for him a single transaction, but for the employee -who handles many credit cards per day- it may look quite different.

The third step complies to develop and execute solutions for contactless operations. The key question that must be replied is how much and what kind of contact each customer wants to have and that the employee can safely give. To achieve this objective it is necessary to shift to less risky operational models and processes/policies redesign, with team working and collaboration among functions for a better customer journey delivery. Confirming a service through a text message, digitalizing physical-branch networks operations and limiting the maximum number of customers in a facility are examples of what may be implemented to reduce contact. Moreover, virtualized in-room experiences are being created by different hotels, allowing guests to experience their amenities and the surrounding areas, and taking note of customers' preferences to create tailored welcome gifts and other customized interactions throughout their stays.

Post-crisis will give the opportunity to develop innovative customer and employee experiences, reexamining firm's values and brand in the new emerging context, and repositioning distinctively to create novel offers through a new partnering ecosystem.

The fourth step relates to adapt and sustain processes to assure employees and customers' safety in the current fluid context. In this sense, it is important to continually test and adjust solutions, improve management systems, share responsibility for continuous improvement, redesign the customer journey to contactless but human experience, and strengthen employee engagement with frequent communication that reinforce the company message.

- *Contactless operations are distinguishing many vendors.* Across many countries, consumer concerns are increasingly dominated by personal safety when interacting with a firm. That is why they are preferring low-touch service options across all industries (i.e.: telemedicine, restaurants and grocery delivery, and online fitness). As an example, it is cited a retailer that is using augmented reality to make customers shop in a store, interact with clerks and browse products. In-person interactions between customers and employees are being limited and redesign to the online and contactless, guiding to a new step in their relation.

As a result of their study, firms must move to a more human-centered service operation, reducing risks and improving safety to help employee and customer experiences in the

next normal that must be reimagined. Firms’ executives should develop opportunities, co-creating new solutions with stakeholders while reducing concerns and risks among customers and employees’ journeys.

The problematic that was exposed can be seen from two basic perspectives, the retailer and the consumer sides. It has its origin in the COVID-19 pandemic and in some prior tendencies -not only technological- that have been managed at a different pace than what is required by the actual crisis, and that is synthesized in the following Table:

Perspective	Problem/Impact
Retailer	<ul style="list-style-type: none">✓Affect multiple industrial sectors and worldwide operations in different ways, in a take-it-or-die situation.✓New retailer role.✓Matching the rapid demand, considering the new vulnerable people.✓Online retailers, like Amazon, are developing a brick-and-mortar network .✓New policies and processes.✓Work across silos.✓Firms are learning new ways to handle customers’ data privacy, becoming a point of differentiation and competitive advantage.✓Investment in machine-learning platforms for contactless engagement to protect the health and safety of consumers and employees.
Consumer	<ul style="list-style-type: none">✓ Behaviors and attitudes are changing, like preferences on online commerce, consolidation of shopping trips, and shifts in the primary store.✓Sales decrease in physical stores.✓Purchases on essential and electronic items.✓Trying new channels.✓ Preferences on different channels: the omnichannel experience.✓The privacy imperative about sharing data.



Table 1 - Problematic

Source: Own (2020).

The hypothesis of this study says that retail operations must be reimagined for the next normal -after the economic and humanitarian crisis that the world is going through- in order to improve companies’ performance and results, while improving customer experience.

The basic question that guided this investigation refers to if there are ways to reconsider retail operations for the next normal while improving company performance and results.

In this way, the objective of this research is to analyze retail operations, basically under the COVID-19 environment, proposing ideas for staying in business and succeed in the next normal.

It was utilized a qualitative methodology, with a descriptive exploratory study and a non-experimental design (within them, transversal, since the information was collected at a given moment of time).

The analysis unit refers to retail operations, especially under COVID-19, and related matters.

This is a bibliographical investigation that considers important world-wide secondary sources. As a result, it does not include a field work.

Within the scope of this investigation, were found some limitations/clarifications that are detailed below:

- Although it is difficult to ascertain that all relevant information has been included, this work is connected to studies obtained from significant secondary sources on retail operations, COVID-19 and related matters, applicable to every organization, regardless of the particular sector in which it operates or size.
- The present study is complex and multidimensional due to its highly social content. As a result, what is proposed is shown with an open mind and in a professional discussion tone.
- The conclusion is supported on the elements that have been analyzed and that are part of the present work.
- Based on the understanding that the study has been qualitative, explorative and descriptive, with a non experimental design, it is not possible to generalize its findings, although intends to contribute to the decision-making process regarding the studied topic.

It is remarked that the limitations/clarifications detailed above have not been an obstacle to reaching reasonable conclusions regarding the objectives and hypothesis of the present study.

This research took place in the period Feb.-Aug., 2020, in Buenos Aires, Argentina.

Finally, it is indicated that the hypothesis was corroborated and the objective verified.

2. Teoretical Framework

In the following paragraphs are developed the theoretical basis of this study, comprising –from one side- the importance of understanding customers, building empathy and improving their experiences with the brand, and –from the other side- a company perspective that includes how to approach the restructuring that is needed in many firms, encompassing technology, supply chain operation, store role and some specifics on the food retail sector.

These components are intended to help in reconsidering/shaping retailers and networks' organization, and consumer preferences and experiences.

Understanding customers

Empathy for customers

The basis of any business refers to responding to customer needs, preferences and wants, and –if possible– delighting them, although in this difficult context some additional things are required. Dore et al. (2020) indicate that the COVID-19 global economic and humanitarian crisis changed the way people live, work and think, as many elements of life and business are being challenged. Companies are doing their best going through this difficult moment, responding effectively to the crisis, managing supply chain disruptions and safeguarding employees. Specifically and analyzing the US consumers, firms are working on improving the customer journey, that is crossed by the essential concerns they face like depression, anxiety and unemployment. So, safety, security and everyday convenience are the customer experience efforts that every organization should follow. The new foundation is based on empathy, care and emotional connections with the communities that are served and specifically with their customers, but first it was needed to stabilize the operations and take care of employees.

The authors point out seven actions that demonstrate empathy for customers, as follows:

1. *Reduce physical interactions, minimize risks:* This is being done through, for instance, extending opening hours; e-commerce and free home-delivery; limiting the quantity of customers who may stay inside the store and putting physical-distance stickers on the floor to aid compliance; and opening close-proximity stores. By looking at the organization from the inside, this approach requires new standards of cleaning and working processes (i.e.: avoid touching passenger-handled items and suspending drink refills).
2. *Innovate in the product portfolio, contributing to safety:* Products must respond to worldwide consumer-essential needs, even if those goods are outside of their current product offering (i.e.: distilleries are using their ethanol supplies to provide materials for hand sanitizers, partnering with refineries; apparel manufacturers are producing face masks; General Motors –partnering with medical firms– is manufacturing ventilators to produce respiratory care products; rideshare firms are transporting medicine and basic goods, not passengers). Obviously, these companies have a commitment to customers and society, and provide alternatives –out from their core business– to continue providing meaningful work for their employees.
3. *Provide help to customers, alleviating their financial stress:* The first customer concern is safety, but the second is financial. In addition, small business owners are also facing liquidity and income issues as bigger firms are forced to decrease their operations. Flexible solutions are required in these circumstances; for instance, financial institutions are not penalizing overdue customers, telcos are not terminating services to late payers, energy firms are not shutting off power for nonpayment, travel agencies/major airlines are waiving cancellation fees, and Burger King is providing two free kids meals to purchases through their App in USA.
4. *Bring joy and support the emotional needs of customers “trapped at home”:* As many

people must stay at home, companies are acting to make homelife more enjoyable while ensuring to improve the well-being of their customers. Telcos are providing free unlimited data for the near future to all mobile customers to help parents to entertain their children; entertainment firms released content ahead of schedule; meditation and mindfulness providers are offering free subscriptions and content to professionals and customers; and many firms have launched online services (i.e.: food delivery, online courses, and traditional financial services).

5. *Shift customers to online channels.* For many people, remaining at home means that physical company operations must shift to online offerings. As an example, gyms closed physical facilities and are offering home workout courses to their members; Cisco Webex is assisting schools and universities in their transition to remote learning; Italian banks are helping their customers to use digital channels; and medical enterprises are providing digital care services with zero copays. In a post-recovery context, digital channels have the potential to increase firm's traffic.
6. *Personal interactions with customers matter; stay reachable:* As physical retail stores closed, customers are turning their questions and requests to other channels that require personal attention and care. Inbound calls must be replied by remote-working employees who must maintain communication and engagement, and many firms are enhancing options for seeking information digitally. Virtual products consultations, and helping for changes and cancellations are examples of better reachability for most companies, but in the medical industry their call centers must be trained to effectively manage novel questions on -for instance- coronavirus.
7. *Company values should demonstrate care for the community:* Company actions must build trust and reinforce brand values, but also support local communities. In Germany, McDonald's and ALDI signed a staff sharing plan for McDonald's workers to assist ALDI stores ensuring that they can reach their increased customer demand. Allbirds delivers free shoes to healthcare workers, and drugstores and pharmacies are donating parking lot spaces for medical testing. To establish a link between these efforts to firms' values different companies implemented actions that show a clear focus on customer care and communities. (i.e.: Alibaba Foundation has donated medical supplies in Asia and USA, and will publish a handbook on COVID-19 experiences in China; Tableau Software has developed a free data resource hub compiling case data about coronavirus in real time; LinkedIn is providing free access to its premium features to help employees during the economic downturn; and others -like Coca Cola- are reminding that "staying apart is the best way to stay united".

The authors conclude that concentrating on marketing and meeting customer desires are the essence for socially conscious firms, no matter the geography or the type of business they are in. COVID-19 represents an opportunity for leaders; empathy and care have the potential to create connections that will outlive after this pandemic and will last in their communities for long time.

In the following Table, it is shown a summary of what it was said in this section:



Table 2 - Empathy for customers

Source: Own (2020).

Improving customer experience

According to Briedis et al. (2020), for retailers remaining relevant implies to improve customer experience on different areas: digitalization, innovation, operation, safety and operating models. COVID-19 has changed dramatically the scenario -instilling urgency- as, for instance, in an early stage digitalization was supposed to happen in a longer term. As a result, e-commerce sales in beauty products and apparel increased 10% since the outset of the pandemic, and in grocery between 7 to 10%.

Five actions are noted to improve customer experience, as follows:

1. *Increase the traffic on digital channels*, as traffic on physical stores diminished, for which it is necessary to reallocate funds to digital channels and online marketing.

Also, the digital-presence and engagement must be reinforced, extending it to mobile apps, online communities and points-of-sale experience.

Finally, it should be ensured that the digital experience is frictionless, because customer expectations are rising for digital channels, needing to be stable, speedy and deliver on time. Because of this, retailers should integrate all digital channels, offer complementary services like payment options, and build consistent experiences. In addition, they should design optimized web pages for digital shopping and consistent marketing messages.

2. *Omnichannel must be injected with innovation*. It is a priority to constantly evaluate

customer preferences and behaviors, omnichannel offerings, and find opportunities in order to innovate and fill gaps. Channel integration with customer needs should be the base to offer a consistent brand's digital experience. Personalized attention to customers on virtual appointments and/or live streaming, and helping individuals to find the right product online are new ways to better serve and learn from them, and train staff.

De-risking digital-purchasing decisions is another area on which retailers have been working on. Thanks to virtual/augmented reality, machine learning, 3-D models and computer-vision techniques customers can know how items look on them and preview styles as they move in their home, and retailers are experiencing conversion rates increases as never before, also with new delivery mechanisms (curbside pickup and aggregator delivery). They are also reconsidering store formats to support third-party delivery services (i.e.: creating speed zones in the front of the store to accelerate order's delivery).

Moreover, strategic partnerships are building ecosystems between retailers and vendors to improve convenience for customers, gain access to new capabilities, reach new customers and boost sales. As an example, DSW -a footwear retailer- partnered with Hy-Vee, a grocery chain, to have access to new physical locations and new customers.

3. *New safety experiences and conditions are required for customers and employees.* Many customers don't want to stay much time in the store but when they are they want to be as safe as possible. Policies and processes must ensure safe distances; sanitize products and surfaces, and empathetic communications.

Costs must be reduced in order to improve operational efficiencies and compensate the shift to online channels, while enhancing customer experience and workforce conditions. For this, it is necessary to redirect employees to priority areas and core processes, with leaner practices and addressing new operational needs, but also constraining the number of in-store employees.

4. *The physical network and locations must be reimaged* to best support customer experience because many shifted their purchases to e-commerce while COVID-19 has accelerated this trend. A holistic approach to profitability and performance should induce retailers to reassessments, transformations and probably closure of many locations.

As a consequence, the role of physical locations should be reconsidered. Their traditional view, as in-store customer engagement, is evolving to a strategic importance for the retailer's network with immersive experiences to increase foot traffic. Also, retailers are experimenting with dark or grey stores (click-and-collect services). In this model physical locations are turned into permanent or temporary nodes to allow fast delivery.

Store layouts need to be reviewed to implement a novel store's role as an important component of the omnichannel journey. For instance, stores are being used to strengthen brand's positioning, educate consumers on product offerings and boost e-commerce sales. Nevertheless, new technology solutions are contributing to changes in the store formats and new customer journeys, like Amazon Go locations.

5. *Agile operating models are required.* Real-time insights on customers and agile operating models are needed. New approaches go beyond customer experience optimization, satisfaction measures, traffic trends and purchase suggestions; they are covering real-time tracking of consumer behaviors and trends, and more dynamic data for immediate insights. The most advanced retailers are analyzing the influx of new customers to physical stores or digital channels to engage them in new experiences and build adequate retention plans, messages and offers.

Through social media retailers are having insights on rapidly changing consumer behaviors creating -for instance- new offers. In this sense, customer experiences are in constant rebuilt through a share feedback between consumers, adding new offer possibilities. Additionally, qualitative feedback is gathered by online tools or in-person to achieve higher and interactive results.

Agile practices and real-time consumer insights are helping to recalibrate business models and offerings to meet more demanding business expectations. Information processing and tests approaches must be handled at an enormous speed to unleash value and launch offerings at scale. That is why more organizational levels must be empowered to make decisions rapidly.

As a result, the authors suggest that retailers must drive implementation through cross-functional teams and establish higher aspirations for customer experience, managing appropriately the five actions described above. The focus is on customer experience, innovation and agility in their omnichannel experience.

A summary of this section is presented in the following Table:

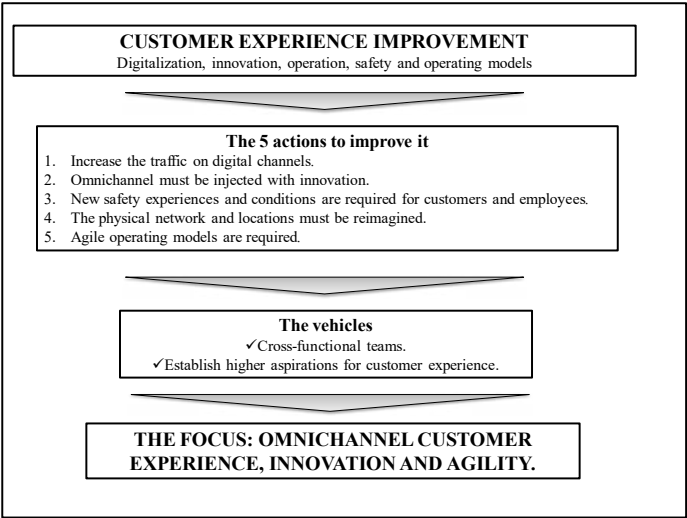


Table 3 – Customer experience improvement

Source: Own (2020).

Company perspective

Organizational restructuring: Talent, network force and operating models

Lund et al (2012) indicate that different factors -like changing demographics; skill shortages and global competition- are forcing firms to manage their best talents more effectively. In the past years, automation, reengineering and outsourcing were applied to various tasks but there are knowledge works -that require extensive human interactions- that remained untouched, like sales representatives, managers and other skilled professionals. But now, it is required to break down tasks, make work more flexible and go virtual.

Adapting quickly to this changing environment is a must. In this sense, Agnihotri et al. (2020) present some practices that can help retailers after the health and humanitarian pandemic we are going through, protecting the network workforce and their financial results, as follows: supply availability and on-time delivery; rapid adaptation and quick decision making; shrinked innovation cycles; working remotely and employee's physical and mental health; and specific leadership capabilities.

Seeing the talent challenge from the consumer side and according to Briedis et al. (2020), the consumer behavior changed dramatically due to COVID-19 and retailers will have to work hard on the customer experience area to remain relevant. Because of this pandemic, many physical stores were forced to closure, putting an interrogation mark on the in-store experience. Moreover, the excessive focus on face-to-face engagements and physical stores are making hard the lives of many retailers, so reimagining distinctive experiences through an omnichannel approach will make it easy for organizations to recover from the pandemic. The authors say that in any case talent becomes an imperative to accomplish this goal.

With the preceding understandings and taking into consideration the importance of working in teams, focusing on customers becomes fundamental to analyze some differences between agile and the traditional teams. Comella-Dorda et al (2020) propose that members' co-location is the basis for agile teams to excel in operation and be a source of competitive advantage, but under actual circumstances organizations were forced to work remotely, needing to find new sources for competitive advantage. Agile teams must have the ability to adapt to fast-changing business priorities, digitalization and disruptive technologies. In the traditional way, these teams worked in the same place, building trust quickly through frequent in-person contact, simplifying problem solving through instant communication and quick decision processes. In contrast, now they need to act with a fully remote approach, which reduces cohesion, looses productivity and increases inefficiencies, all inconveniences that can be addressed with the necessary culture and technology in place.

The authors point out some elements about agile teams, as follows:

- *Culture and people*: reinforce the unified one-team experience, camaraderie, community and trust, tracking and developing ideas for innovation. New team norms, moral and adaptation –for instance, to virtual tools, personal interactions and capture collective views- are required to cope in this new environment.

Also, cultivating bonding and morale activities are important in phase-to-phase contexts, such as lunches, coffee breaks, happy hours and after-lunch socialization. Efforts should be made to make everyone feel saved and communicated contributing remotely.

In agile teams coaching and feedback should also be made in remote formats, with a coffee and videos turned to actively monitor body language of both parts.

- *Recalibrating remote agile processes:* what worked in the office setting not necessarily will work remotely; it is all about adapting to the new situation that sticking to a guide. Breakout sessions may need members assigned as spokespersons or coordinators; work may require a more structured and purposeful communication; documenting discussions is not needed as people are informed, connected and aligned for decisions; asynchronous communication -like a dedicated messaging channel- may help team members to be updated on daily work; engagement may need to be revisited with break sessions to motivate agile teams, as their members are accustomed to face-to-face communication and interpersonal relations; and –finally- leadership approach –which is basically the same- must be adapted to being more proactive, purposeful and closer to team members to push work forward, not overwhelming people with instant messages and emails, and assuring they are heard.

The study concludes that there is an abrupt shift to a remote-working context that may help to reinforce agile culture and productivity, and will recalibrate remote-processes to achieve agile objectives.

But to help on the talent challenge it is required to work on operating models which must be rethought to be capable to face the next normal. On this matter, Agnihotri et al. (2020) suggest that the following practices are required:

1. *Reimagine operating models and based them on fewer and bigger opportunities.* It is needed strategic focus, process changes and leadership commitment through specific practices. like a) having disciplined management meetings that support and revisit strategic priorities; b) working norms not focused on tactical discussions; c) shifting from a 3-year strategic planning process to a more dynamic resource-allocation model; and d) narrowing new priorities to novel business segments, transformation and business building.
2. *Cost structure reset.* Companies must adapt organizational structures and operating models as there are shifting consumer sentiments, new models of consumer interaction (i.e.: curbside pickup), and increase of fulfillment and labor costs, and of general and administrative expenses.

Certain categories have flourished because of near-term stock-ups, but others have been affected adversely, with margin implications.

There is a need to invest in new capabilities, like Digital, Data and Analytics (DD&A).

As a result, cost structure can be reset while focusing on priorities and other decisions, including new protocols for people when they come back to work and flexible work options, with HR and IT implications.

3. *Resources orientation to winning capabilities*: Some consumer trends accelerated in the last months. For instance, online shopping is up by 20 to 70% since the pandemic began, so supply chains are adapting quickly.

That is the reason why many stores could become nodes, and many must adapt product, pricing and promotions to each market. So, supply chain flexibility is considered a value added in the next normal.

Focus on hygiene, sustainability (eco-friendly alternatives), contact-free payment, fulfillment models (delivery and pickup), and loyalty to brands and stores should respond to new consumer habits.

Growth must be captured from these significant trends, investing in existing capabilities (i.e.: innovation and e-commerce) or new ones (i.e.: omnichannel sales, flexible supply chains, or accelerate DD&A), and rethinking marketing strategy, capabilities and spending. M&A may be a response to the search of new capabilities, for which an adequate resource allocation may increase capabilities in the future.

4. *Workforce flexibility*: After COVID-19 flexible workforce models are under experimentation, and working remotely and video-conference applications abound. Imbalances between labor supply and demand are being addressed by talent exchanges between firms that have fired employees and others that are looking to hire workers, or by internal talent exchanges.

New talent strategies are being seen, as follows: a) the so called talent-anywhere strategy may be used in the long term to strengthen capabilities where there are difficulties to build them, b) labor sharing by companies that do not compete with one another, probably standardizing common roles and producing a “certification” on works like cashier, stocker, distribution coordinator and line manager, and reducing the HR burden on talent recruitment, c) Gig economy for specialized labor (i.e.: designers and creative agencies).

5. *Changed employee value proposition*: The dynamic employer-employee has changed, as there is a new focus on employee benefits (i.e.: sick leave and health insurance), protective measures (i.e.: personal protective equipment) and the new norm of remote working. Retraining can be done at a low cost through online platforms, and these kinds of procedures can be maintained in the future for many more workers. Workforce flexibility acceleration can generate efficiencies to this new dynamic.
6. *Focused and rapid rate of decision making*. Fewer meetings are needed to close a business unit or a store, and leaders are focused on bigger bets than before.
7. *Leadership focus based more on intuition than on traditional skills*. Empathetic openness, less command and control, decisiveness amid uncertainty and optimism

are skills needed at this time. The next normal operating model should comprise cross functional decisions at much more risk in order to create more business opportunities.

The authors conclude that big and bold changes are happening, and will happen in the near future. Faster decision making on novel priorities should be the base for new operating models and organizational restructuring. Leaders should be focused on new ways to adapt their organizations to the next normal.

In the following Table, it is shown a summary of what was said in this section:

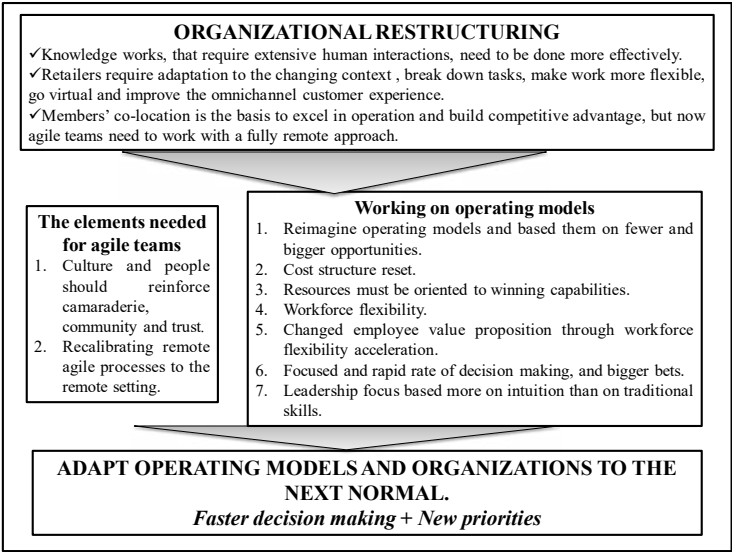


Table 4 – Organizational restructuring

Source: Own (2020).

Technology

Adhi *et al.* (2019) state that technology will give brick-and-mortar retailers a significant boost as US consumer confidence returned to pre-recession levels. But brick-and-mortar retailers are struggling due to an increasing wage pressure and store operating costs, and -also- because of the e-commerce rise. In fact, many more consumers' -especially, the younger- are spending their money in online transactions, preferring the online retail experience. These factors are causing the closure of many stores throughout the US nevertheless the death of physical stores is really far as for 2023 e-commerce is forecasted for only 21% of total retail sales and 5% of grocery sales. In addition, they asses that Amazon and other important internet players are developing their own brick-and-mortar networks, for which it is clear that the future of retail operations belongs to firms that can offer omnichannel experiences. For that, it is necessary to utilize emerging technologies

—as machine learning, big data analytics, robots/automation, and internet of things— and enrich customer's data to help in the transformation of in-store experiences through personalization, which could increase 20 to 30% their revenues. One of the challenges is to bring new technologies and data together in the offline world.

Moreover, they say that it is observed an evolving consumer journey and, in the near future, we could see a Smartphone -connected to the in-store Wi-Fi or facial recognition technology- used to sign up to the store access which allows to connect it with the shopping list made at home. Also, could be seen people waking in the aisles, smart shelf displays illuminate to show the items, highlights of tailored offers and complementary products, and regular purchases that do not appear on the list. The aisles of prepared meals may be equipped with augmented-reality displays that reveal the origin and nutrition facts of their content. Living the store, it may be no need to check out as RFID (Radio Frequency Identification) scanners and machine vision systems did their job identifying every product that was packed as he/she passes through the doors, debiting directly to the credit card which is on file in the retailer's system.

Technology will not only reshape customer experiences. It may help to trade shifts when having a conflict or negotiate working schedules each week through a mobile app, and earn a premium by volunteering for busy or hard-to-fill shift. Additionally, sensors -located in the shelves- may monitor the stock status, a machine-learning system plans replenishments and robot carts deliver items or take them away. As a consequence, people in the store will spend more time understanding customers' habits and preferences, and offering advice on new products and recipes, or answering questions. Hand-held terminals may help him/her to call up on customers' preferences, suggestions, location and real-time stock level of every product.

Managers may spend more time adapting stock, presentations and promotions. Time-consuming tasks like scheduling and reporting may be handled automatically by artificial-intelligence tools on their phones that alert any situation that needs attention in real time, such as promotions that are not selling in other stores. Their focus will be on performance and service improvements, aided by sophisticated performance-analysis tools; in this case, virtual reality helps on seeing how the new promotional set will work.

Also, in-store technology will have an impact on P&L sheet as personalized offerings and optimized assortments will reduce waste and raise sales, up-selling or cross-selling. The workforce profile will change as well, with knowledgeable associates earning more and focusing on value-added and customer-facing activities. In addition, total wages may be falling because of automation and technology help.

The authors conclude that the store of the future will achieve double EBIT margins compared with those of today, and an improved customer experience, easier-to-run store and better employee engagement -thanks to the technology that is available today- are going to take place. Leaders should act quickly to prepare their organizations to a technology-enabled revolution, focused on efficiency, capabilities and customer experience.

In the following Table it is shown a summary of this section:

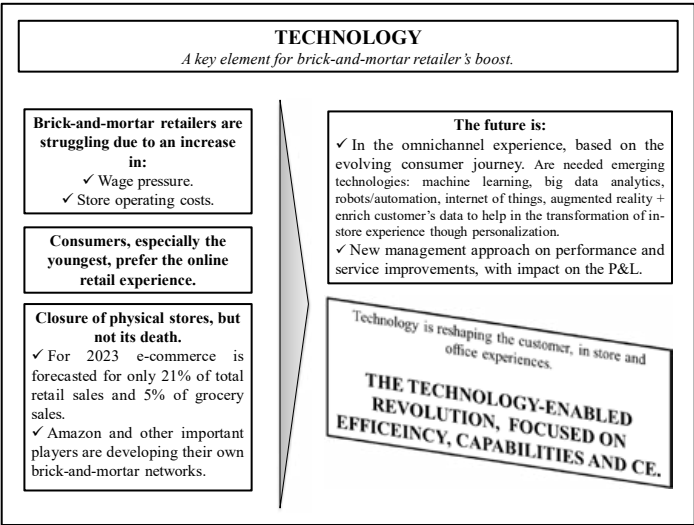


Table 5 – Technology

Source: Own (2020).

Supply chain operation

This is another aspect on which leaders must work hard. Aryapadi et al. (2020) suggest that with the COVID-19 pandemic retailers reinforced their efforts on essential goods provision, and on protecting the health and well-being of the communities they serve. Also, these organizations are focusing on keeping goods moving to store shelves and consumers' doorsteps, so supply-chains leaders must create transparency and build rapid-response capabilities to mitigate fallouts. As a result, supply chain operations must be reimaged and reformed to improve performance, taking into account the changes that took place in different countries -like Spain, UK and USA- during the outbreak. These changes imply shifts in consumer behaviors and purchasing patterns (more spending in groceries and, in general, nondiscretionary categories than in discretionary consumer-products, like restaurants, furnishing and apparel).

In addition, it is noted a shift spending among channels from in-store to online spending in various types of items and mainly in UK and USA, although in Spain and Italy the in-store spending on discretionary goods may decrease in the near future. In this context, retailers must adjust their supply chains, from procurement to customer service; rebalance the surge in demand; relocate every resource -inventories, working capital, employees, and transport capacity- to where they are most needed; protect their employees and focus on employees' redeployment.

They insist that retail supply chains are struggling with operational risks and with the

humanitarian impact of the outbreak, suggesting five actions that may help their business and the employees and communities where they operate, as follows:

1. *Secure nondiscretionary goods demand* as these product categories produced stock outs for some retailers. So, they are working with consumer-packaged-goods makers, co-manufacturers and distributors to respond to secure supply of essential items, mainly through: a) reducing variety and boosting quantities, which helps suppliers on order processing, b) easing payment terms, and c) widening delivery terms.

Resources redirection from nonessential to essential categories becomes important to increase availability and replenishment speed.

Retailers specialized in nondiscretionary goods have to concentrate on cash flow and inventory management initiatives.

Finally, canceling/delaying orders or pruning assortment might be explored but it must be considered that these kinds of actions pose risks on suppliers. These choices are not easy as they require collaboration among retailers and vendors to be beneficial for both sides.

2. *Redirect inventory*. Purchasing, planning and inventory management must be reconsidered to favor items in high demand and to redirect inventories toward locations with stock outs or where sales are brisk. Availability and replenishment speed are key activities now.
3. *Add distribution capacity safely*. It is important to keep workers healthy and good workplace hygiene, requiring: a) adequate trainings for health procedures, b) right protective equipment, c) to suspend operations between shifts to sanitize equipment, and d) to implement health screenings which can rapidly identify sick workers.

Also, it is needed to reassign current resources to nondiscretionary categories where goods are selling fastest and -in the case of discretionary-goods- some retailers are cross-training and reassigning personnel to e-commerce operations, and others are hiring specialists from firms in crisis.

4. *Logistics agility and flexibility*. Disruption to essential services can be limited through logistics flexibility. It should be considered that -in USA- trucking demand is increasing year over year and freight cost have also spiked. In this actual environment, what the best retailers can do is to secure enough capacity to get essential goods on store, not increasing expenses. This should be made by shipping goods directly to stores, bypassing distribution centers, or by a) simplifying assortment and packaging, b) making SKU full-pallet shipments to consolidation facilities, approach that puts shipping speed ahead of product variety, and c) for nondiscretionary goods retailers, supplementing transportation capacity with discretionary goods retailers who may be underutilizing their fleet because of lower sales volumes. This kind of cooperation is seen in quick-service-restaurant chains in USA that have offered their logistics capacity to food banks and FDM retailers to deliver essential items. Moreover, in UK competition laws are being relaxed in order to get essential products on store shelves more quickly.

5. *Reliably delivery.* During the COVID-19 pandemic nondiscretionary goods have notable increases in online shopping thanks to quarantining, self-isolation and stay-at-home orders. Delivery to consumers and curbside pickups are no minor changes. It is seen that delivery windows are being widen from immediate to hours and days, allowing retailers to rationalize and group deliveries to nearer areas, saving time and mileage. Some retailers are converting outlets into dark stores and others are trying delivery promotions size to boost sales (i.e.: by lowering the order necessary to qualify for free shipment and relaxing return windows to give customers more flexibility). However, for consumers that don't want goods delivered, retailers should accommodate the stores (i.e.: reserving some period of the day for shoppers at greatest risk of infection and cleaning/sanitizing stores frequently). Retailers' employees should also be protected and trained to avoid infection.

The article concludes that it is required a creative and resourceful response to the pandemic, for which retail-supply-chain leaders must protect their employees and customers, and secure goods inventories and delivery, making supply chains more resilient.

The following Table offers a summary of what was said in this section:

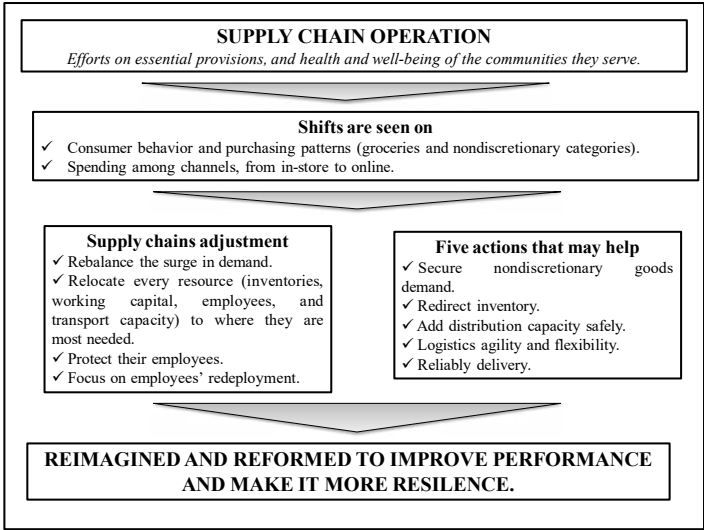


Table 6 – Supply chain operation

Source: Own (2020).

Store role and operation

Adhi et al. (2020) mention that retail stores will come back with a redefinition of their role and operation, but unsure of when they would reopen. In addition, they declare that:

- Their workers were laid off, deepening in an economic crisis which nobody knows when will finish.
- Consumer behaviors changed -may be permanently- and retailers must take them into account. New realities or the next normal become the new imperative.
- Consumers' lost income and declining confidence had lowered discretionary spending, such as apparel.
- E-commerce is accelerating its adoption -a trend that was seen before the pandemic- boosting certain categories (such as makeup) and attracting segments that before preferred online shopping (like baby boomers and Gen Zers). So, online penetration is much more expected in USA than in Asia, as its use was lower before the pandemic.
- Retailer's P&L will be shaped by new industry trends -crash in store sales, more aggressive competition and escalation of operational complexity- that could reduce margins, helped by the sales migration from stores to e-commerce (a lower-margin channel for retailers). Their study asserts that a 10% increase in online penetration -combined with a decrease of 1% in gross margins- may propose a 5% profitability decline, pushing many brick-and-mortar stores to a loss territory.

In addition, they pronounce that the coronavirus crisis escalated the need for a retailers' change, needing to redefine the store's role, operation and network. As a consequence, there are three strategic imperatives that must be followed to survive:

1. *Accelerate in-store omnichannel integration* to offer an important value proposition. Store traffic was declining prior to pandemic times and consumers are now buying from home a wide range of products online, staying for weeks at a time.

After this pandemic, good reasons to visit a store should be given by retailers. That is the reason why preferences should be deeply understood, and new in-store roles and interactions must be developed to change in-store customer experience.

As a result, in-store omnichannel integration becomes a must for the next normal, for which are required to be implemented: a) In-store role redefinition with unique customer experiences, superior product-discovery experiences and exclusive in-store merchandise, b) Omnichannel offering with curbside pickup and buy online and pickup in store (BOPIS), and c) Omnichannel staff building with adequate training and equipment to engage customers in an integrated product-discovery journey and experience, enabling in-store personalization with customer data generated in online and offline touchpoints.

2. *The store operation should reflect the new reality*, for which are needed to implement the following two tasks: a) Resetting cost structures, to adapt to the shift from physical stores to online purchases. For that reason, it is required to minimize inventory levels and store-replenishment frequency; work with sourcing and distribution teams to shift

certain tasks -like tagging and labeling- to distribution centers and vendors; digitalize non-value added in-store activities to freeing up associates for higher-value ones; enhance omnichannel touchpoints, redesign processes and reduce the cost of fulfilling orders; and implement contactless self-serve features for omnichannel transactions -including in-store settings- for online order pickups, price checks and returns management, and b) Preparing the workforce for the next normal as more than 75% of retail frontline associates were laid off after the pandemic begun. Recovery time should include the redirection of the in-store evolving role and flexibility; retraining/redeploying the high-performing talent to fill omnichannel roles while stores reopen; improving training and processes through micro-training initiatives, consisting of short and focused learning modules through rich media formats; rethinking workforce composition to mainly improve and reevaluate roles, skills and staffing levels for digital fluency and cross-training; and enhancing workforce flexibility and agility models to adequately manage in store traffic which could include gig workers into the store workforce.

3. *The store omnichannel performance should be optimized* through: a) closing underperforming stores; b) instilling omnichannel operational perspectives by understanding the store’s real economic value and post crisis traffic, and reflecting this novel situation in a store P&L; and c) visioning a future-state store network, accelerating unproductive store-closure plans and rent negotiations, and adding stores or distribution centers for better coverage.

As a result of what was said in this section, the authors propose that retailers should be prepared as soon business comes back. Top priority should be on customer and associate safety, and retailers should proactively put their lens on P&L issues, basically sales and profits.

In the following Table, it is shown a summary of this section:

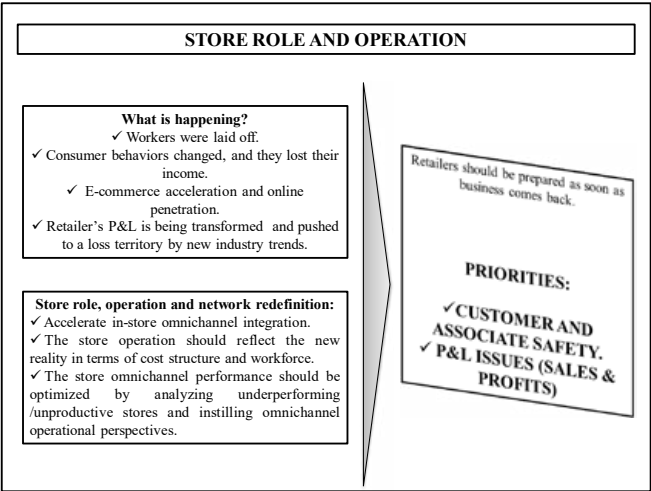


Table 7 – Store role and operation

Source: Own (2020).

The food retail sector

From the study of this sector, Aull et al. (2020) assert that the COVID-19 disease is less fatal than SARS and that the impact is different for every retailer, depending on the country, category and customer mix. Retailers must act quickly and top priority is on saving lives; a far second objective refers to managing the business.

They recommend retailers to do what they do best: be a reliable source of food and essential items, and stay calm with good execution in this unsure time. In more detailed, are suggested the following six actions for retailers in order to help their business, stakeholders and community; the first four actions are urgent and the final two are more directed to the long term:

1. *Protect employees and customers:* Define contingency plans and maintain morale. The heroes are at the field: shelf stockers, cashiers, drivers and warehouse workers. Some actions that are seen to cover this issue are: hygiene; limit human contact; use technology as much as possible; self-checkouts; minimize stocking shelves and payments; drop off deliveries at doorsteps; put plastic tents around cashiers; promote an environment that fosters social distancing or isolation; implement stay-at-home policies and back-up plans for the crucial staff; and hire additional flexible capacity.
2. *Secure business community:* As customers must be served, e-commerce sites are rising with associated struggles, like having enough delivery drivers, delivering customers on line, keeping IT systems running, having a flex space allocation for surges in demand, and developing norms with local governments for operating during the crisis.
3. *Get a granular view of the local reality:* Reality is different depending on each country and category of products; granularity matters. There are seen spikes in demand in certain medicines and foods; decline in sales in some store formats (i.e.: convenience stores) but increases in e-commerce players; and –also- stress in the food supply chain and on financial measures (i.e.: shorter/longer payment terms).
4. *Manage demand and supply simultaneously:* As demand is shifting, the supply chain struggles to keep up. This balance could only be restored by managing the commercial calendars and supply chains. In other words, it is necessary to manage consumer demand proactively, for instance by advising consumers to avoid panic buying and hoarding, or charging exorbitant prices for certain essential products. A marketing clean sheet-look is suggested on marketing actions and promotions.
5. *Implement a tech business model:* Different societal trends -as remote working, tech-enabled retail, online shopping and localized supply chains- are accelerating changes in business models. As a consequence, various elements should be implemented at diverse levels: a) At stores: on-shelf availability in real time, automating replenishment, and cash-less and no-checkout models, b) At supply chains: tech warehousing and transportation, and machine learning forecasting to adjust abnormalities fast, c) At merchandising: diversified sourcing to derisk future stocks, tech tools to run categories, strategic partnerships and vertical integrations focus, and private and international

labels balancing, d) At e-commerce: investments in online channels and experiences, and on scalable technology and delivery network, and e) At head office: flexibility, remote-working, team supported transformation and systems able to handle the increased load and cyber security issues of the distributed remote work.

6. *The ecosystem must be reshaped, including through M&A:* Growth alternatives come from many avenues, M&A is one possibility. Also, partnership may be a way to keep many struggling firms afloat and provide new business opportunities into adjacent spaces (i.e.: food business) or through vertical integrations/acquisitions (i.e.: to include services, payments, or tech capabilities). All these factors are specific of each country, category and customer positioning, and more applicable for companies that are cash rich and growth poor.

The conclusion of this article is that there is a full confidence on retailer’s ability to cope with this crisis. Today and tomorrow the health and well being of worldwide population is a priority for which leaders must work hard in their organizations for long term business sustainability.

The following Table shows a summary of what was analyzed in this section:

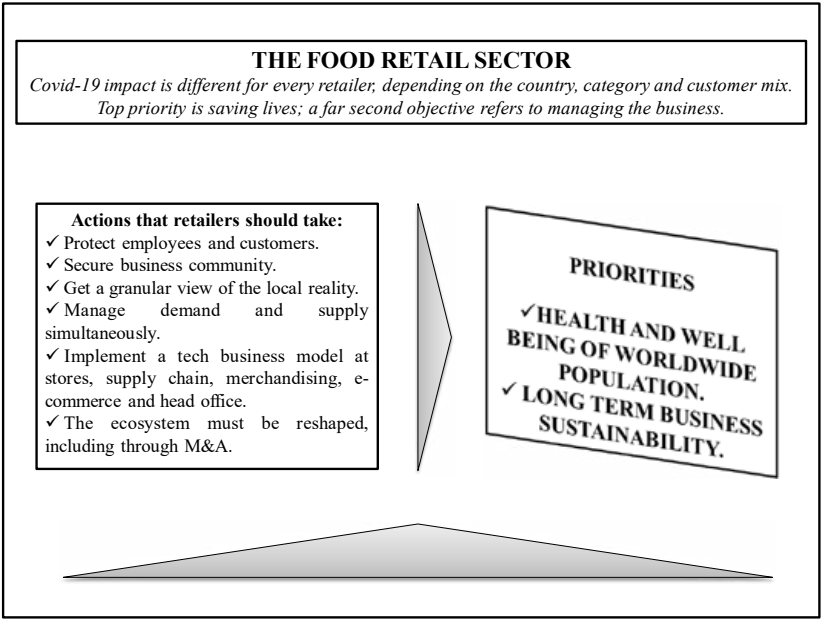


Table 8 – The food retail sector

Source: Own (2020).

Conclusion

The global economic and humanitarian crisis has changed the way people live, work and thoughts. For organizations, the consumer is at the center of the scene and the customer experience is influenced by essential concerns referred to depression, anxiety and unemployment. It is establish that the customer journey needs more empathy, care and emotional connections with the communities that are served. That is the reason why it is witness the rise of the socially conscious firm, which proposes empathy not only on customers but also on employees.

As a result, higher aspirations for customer experience must be followed which depend on operating models, digitalization, innovation, operation and safety. More precisely, it is about agile operating models, digital channels, omnichannel experiences, cross-functional teams and safety conditions of physical networks and locations.

In most firms, a restructuring –aiming to provide faster decision making, and new priorities to excel in operation and build competitive advantage- must be approached, adapting operating models and organizations to the next normal.

Operating models should focus on fewer and bigger bets, a cost structure reset, resources oriented to winning capabilities, workforce flexibility acceleration, rapid decision making and leadership based on intuition, not on traditional skills.

New organizational basis should come from knowledge works, tasks break-down, work flexibility, go virtual, agile teams, and extensive interactions.

In this environment, technology becomes a key driver to reshape the customer, in store and office experiences. A technological revolution must be carried out, focused on efficiency, capabilities and customer experience.

Brick-and-mortar retailers -that are struggling due to an increase in wage pressure and store operating costs- will have a boost in their sales because consumers -especially the younger- prefer the online retail experience. The future is in the omnichannel experience, for which are needed emerging technologies -like machine learning, big data analytics, robots/automation, internet of things and augmented reality- and to enrich customer's data to help in the transformation of the in-store experience though personalization. A new management approach on performance and service improvements -with impact on the P&L- becomes also a must to achieve this objective.

The supply chain operation must be rebuilt in order to make it more resilient and performing. Efforts should be directed on consumer behavior and purchasing patterns, essential provisions, spending among channels (from in-store to online), and health and well-being of the communities are served. Adjustments and enhancements must rebalance the surge in demand and secure nondiscretionary goods; redirect inventories; reconsider resource allocation; enhance employee protection and redeployment; add distribution capacity safely, and work on logistics agility and flexibility to reach a reliable delivery.

As it was said before, retailers should be prepared as soon as business comes back; their priorities should be on customers/employees' safety and P&L issues. To do that, it is required to: a) reimagine the store role, operation and network, b) accelerate the in-store omnichannel integration, c) rebuild the cost structure and workforce to the new reality, and d) optimize the store omnichannel performance by analyzing underperforming / unproductive stores and instilling omnichannel operational perspectives.

The global economic and humanitarian crisis is transforming the way people live, work and think, requiring a re-imagination of the retail operation in a take-it-or-die situation. In the next normal, nothing will be as it was before.

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