

# ECOMMERCE IN THE COVID-19 WORLD

Amit Thard

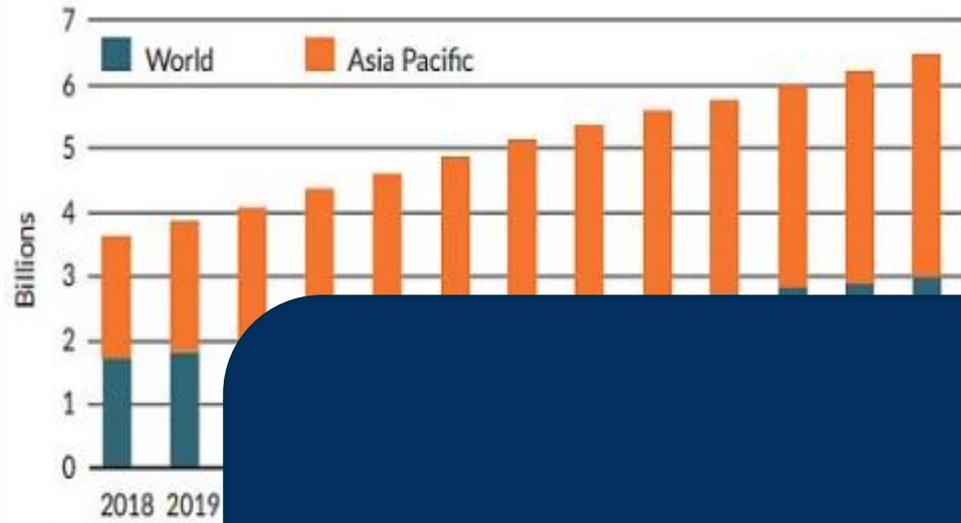
Stanley, Black & Decker

<https://www.linkedin.com/in/amitthard/>

# PRE-COVID ECOMMERCE LANDSCAPE



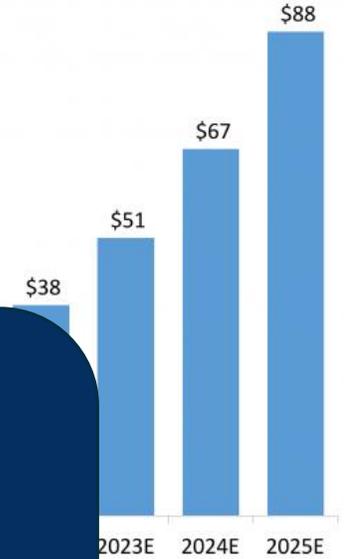
Internet users in Asia Pacific vs rest of the world 2018 - 2030



Source: Euromonitor

Size Of Southeast Asia's E-Commerce Market

In Billions, USD



2023E 2024E 2025E

INTELLIGENCE

Ecommerce Growth in Asia is **GUARANTEED!!!**



# POST-COVID ECOMMERCE LANDSCAPE



# CHANGING TRENDS IN GLOBAL E-COMMERCE

## FASTEST GROWING PRODUCTS

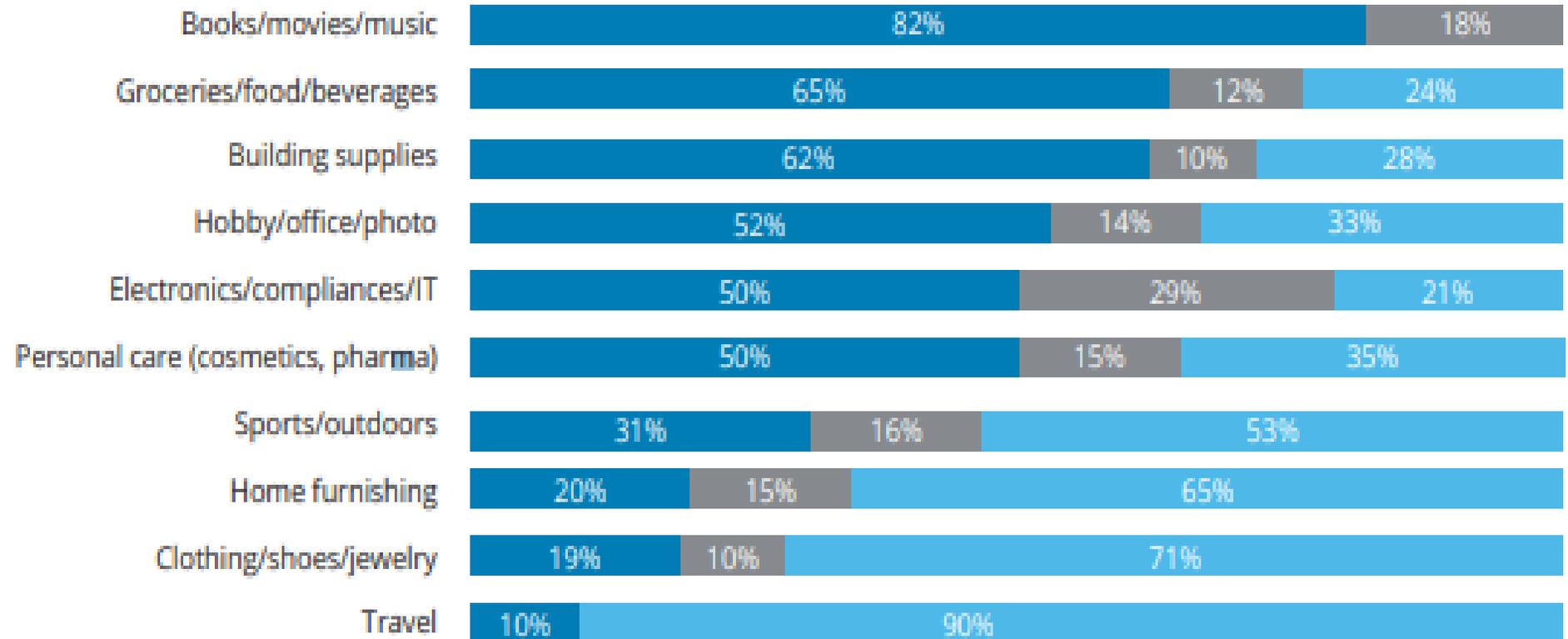


## FASTEST DECLINING PRODUCTS



Figure: Reported revenue development in March 2020 versus expectations/budget before the outbreak - by product category (percent, share of all companies) <sup>2</sup>

More than 10% growth ■  
 As expected (+/- 10%) ■  
 More than 10% decline ■



# Conclusions

- Consumers are now investing to make home a better place
- Increased spending in necessities, reduced spending on luxuries
  - Timelines shifted

# BRANCHING INTO ECOMMERCE

Important Questions

Go-To-Market Models

Challenges

# Important Questions

## Why Ecommerce?

- Gain Market Share?
- Penetrate new market?
- Shift demand from offline to online?
- Branding?
- Drive innovation?

## Supply Chain

- Can my warehouse manage a large volume of small value transactions?
- Build infrastructure versus Outsource

## Resources

- Do we have the right team in place? (Strategy, Marketing, IT, Supply Chain, CS, Finance, Data Analytics, K.A.M)
- Do I have the right software tools for success? (Analytics, ordering, tracking, chat/CS, security, site management etc. )

## Legal

- Do we have the right retail licenses to sell?
- Do we have the correct import/export licenses?
- Do we have a proper commercial policy?

# Go-To-Market Models

Operation	In-House	Enabler Model: (E.g. Singpost, Acommerce, AceCom, SCI, Intrepid etc.)
Merchant of Record	Principal	Enabler
Portfolio Management	Principal	Joint
Marketing	Principal or Outsourced	Enabler
I.T. (Ops./Analytics Software)	Principal	Enabler
I.T. (Site management/Order Management System)	Principal or Outsourced	Enabler
Store Operations	Principal or Outsourced	Enabler
Customer Service	Principal or Outsourced	Enabler
Finance	Principal	Enabler
Warehousing/Fulfillment	Principal or Outsourced	Enabler

# In-House vs. Enabler

## In-House

- Higher Operational Control
- High CAPEX; Low OPEX
  - Longer to set up
- Larger team needed
- Higher Margins when business scales

## Enabler

- Lower Operational Control
  - Low CAPEX, OPEX
  - Faster to set up
- Smaller in-house team to manage
  - Lower Margins
- Unattractive P&L if business scales

# Challenges

- Channel Conflict
- External Pricing Conflict
  - Supply Chain
    - Legal
- Language and Cultural
- Mindset: Leadership, Management, Team

# E2E Workflow

Pre-Sale	GTM Plan	Portfolio Management	Merchandizing	Marketing
	<ul style="list-style-type: none"> <li>Portfolio Planning</li> <li>Pricing</li> <li>Promotions</li> <li>Channel Coordination</li> <li>Marketing Plan</li> <li>Inventory Management</li> </ul>	<ul style="list-style-type: none"> <li>Listing</li> <li>Price updates</li> <li>Image library</li> <li>Promo Management</li> <li>Inventory Management</li> </ul>	<ul style="list-style-type: none"> <li>Brand.com</li> <li>Marketplace</li> <li>Live Chat Team Training</li> </ul>	<ul style="list-style-type: none"> <li>Online</li> <li>Offline</li> <li>Email</li> <li>Remarketing</li> <li>Retargeting</li> </ul>

**\$\$\$ Transaction \$\$\$**

Post-Sale	Order Management	Warehouse Updates	Fulfillment	Reports
	<ul style="list-style-type: none"> <li>Order Info</li> <li>Auto-Email to Customer</li> <li>Order Change</li> <li>Cancellations</li> </ul>	<ul style="list-style-type: none"> <li>Order info to warehouse</li> <li>Track Fulfillment</li> <li>Inventory Update</li> <li>Email to customer (Auto)</li> </ul>	<ul style="list-style-type: none"> <li>Pick, Pack &amp; Deliver</li> <li>Auto Email customer</li> <li>Tracking</li> <li>Reporting</li> <li>Update OMS</li> <li>Post Sales Survey</li> </ul>	<ul style="list-style-type: none"> <li>Order</li> <li>Inventory</li> <li>Sales Trend</li> <li>Revenue/Units</li> <li>Traffic/Conversion</li> <li>Sales Survey</li> </ul>

# Team Roles

## Local Team Lead

- Portfolio Planning
- Pricing
- Promotions
- Channel Coordination
- Inventory Management
- Oversee end-to-end processes
- Team Training
- Strategy
- Reports
- Analysis and Planning

## Local Marketing Lead

- Merchandizing
- Marketing
- Promo Calendar Creation
- Localization of marketing content
- Agency Management
- Traffic and Conversion Reports
- Campaign coordination with marketplace

## Local Ops Lead

- Listing
- Price updates
- Image library
- Promo Management
- Inventory Management

## Regional Content Team

- Campaign Creative
- Copy writing

## Regional Customer Service Team

- Online Chat
- Call Center
- Pre-sales
- Post-sales
- Manage Post-Sales survey
- Multi-Lingual support

## Local E-Admin

- Website updates
- Website Maintenance
- Website Security

# 12-Step Launch Process



# Key Takeaways

Ecommerce Growth is Inevitable

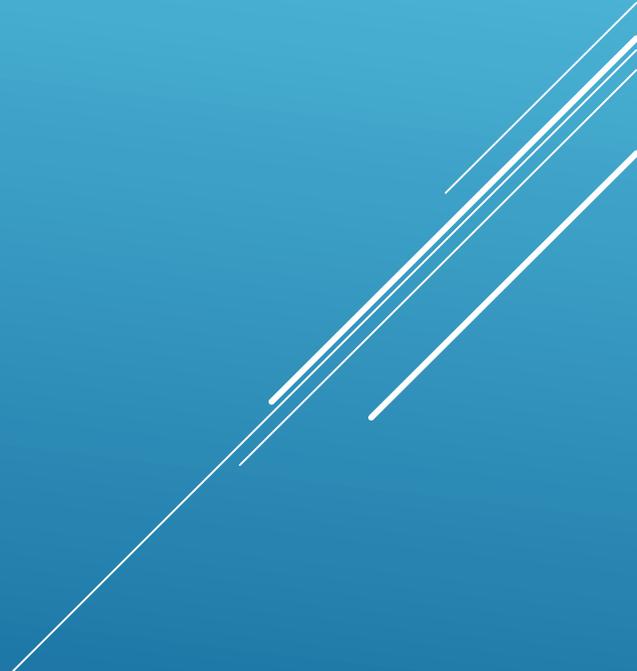
It is less complicated with a proper plan and team in place

The World Already Changed

# THANK YOU

Amit Thard

<https://www.linkedin.com/in/amitthard/>

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