



>
accenture

High performance. Delivered.

Delivering High Performance to the Airline Industry

Today's competitive environment in the airline industry has never been tougher or more unforgiving. More and more players are one strategic misstep away from competitive extinction. Approaches that worked in the past simply don't cut it in today's hyper-competitive marketplace.

- Consulting • Technology • Outsourcing



According to a recent study on high performance in the airline industry¹, there are key imperatives airlines need to address to navigate through today's increasingly uncertain times:

- In their efforts to **manage growth**, airlines should dominate home markets and create an adaptive culture—one that can leverage the opportunities of a rapidly changing marketplace
- In an industry of paper-thin margins, airlines need to significantly **improve their customer experience**, and do so throughout the travel value chain.
- And carriers might need to rethink their existing operating models to **manage operational excellence** by wringing out value from merger and acquisition activity, through sales and marketing and by new market entry and alliances.

Accenture has worked in nearly every aspect of airline operations—from the ground to the cockpit—over the past two decades. We understand that high performance isn't only about success during market booms. It is about sustaining success regardless of boom or bust cycles. Accenture can show you how.

An industry evolution

The industry is undergoing a significant evolution. Accenture serves as a trusted guide for airlines embarking on the journey to high performance. Our airline practice has professionals in key locations around the globe—a team dedicated to serving the transformational goals of our clients.

We draw from the expertise of functional-expert consultants—a bench strength that makes us renowned for our ability to execute large-scale projects with global span. Our people are a part of the fabric of the airline industry, serving clients

from small start-ups to low-cost carriers and major flag network players. They draw from Accenture's industry research that illustrates what airlines can do to get ahead, and stay there. Accenture offers expertise in management consulting, systems integration and outsourcing—combined with our extensive research on the world's most successful companies—to help us guide clients through areas critical to achieving high performance.

Manage Growth

The future of airline travel will likely change dramatically in the coming years: Rising fuel costs will put pressure on passenger loads. Traditional hub traffic flows are changing with the entry of large-capacity carriers. Against this backdrop, Accenture helps clients managing the right balance between demand and capacity. We work with airlines to expand skills in sales and marketing, enabling carriers to strengthen their customer-centricity and pursue secondary revenue sources.

¹ Achieving High Performance in the Airline Industry; Accenture, 2009



The Accenture Global Delivery Network

The Accenture Global Delivery Network comprises more than 83,000 professionals at 53 delivery centers and at client locations worldwide; it can be leveraged by our clients looking to cut costs and achieve growth through globalization.

By applying a systematic approach to creating and capturing proven, repeatable processes, methodologies, tools and architectures, professionals in the Global Delivery Network enable Accenture client teams to deliver customized services and solutions in less

time than would be required to develop them independently. And it creates a scalable and flexible network that truly enables clients to source the right skills and services at the right price wherever they are available: onshore, near-shore or offshore.

Partnering with clients, we manage the full spectrum of merger and acquisition (M&A) activity—from initial planning to integration. We guide clients in their market entry; helping them capture growth and create offerings relevant to new cultures and regions. Accenture helps to capture synergies by striking the right balance between centralized and decentralized management. We have a depth of experience in enhancing alliances, and finding new sources of flexibility through hybrid networks.

Manage Customer Experience

With competition and a dwindling passenger base heating up, airlines need to ramp up their delivery of the customer experience. And not just at the gate and on board—carriers need to understand their customers' needs along the full spectrum of travel: from ticket purchase to destination arrival. Accenture helps carriers create a customer-centric organization that extends beyond in-flight services. Our

work covers everything from online portals to airport biometrics. We enable analytical skills that unearth customer insights and drive customer experience management. Our approach identifies areas that hold the largest payoffs in terms of boosting customer loyalty.

Manage Operational Excellence

Accenture's research into the industry's high performers shows that the most successful airlines continually strive for operational excellence. These airlines have moved beyond the traditional levers of cost management to drive even deeper levels of efficacy and efficiency. At Accenture, we help clients improve their overall cost base and drive flexibility throughout sourcing, procurement and IT, and are industry leaders in outsourcing in these areas. Through assets like Navitaire, we help established carriers take from the strategies of their low-cost/lean-running peers. We have a depth of

experience in Lean Six Sigma—an innovative methodology for achieving high performance by integrating the production efficiencies of Lean Manufacturing with the cost and quality tools of Six Sigma.

High performance in the airline industry

Times have never been worse for the airline industry. The margin for error is thinner than the average profit margin. Carriers are in a "make or break" moment and need to fundamentally change the way they do business. Accenture, with its depth and breadth of industry experience, can help squeeze value out of operating models; realize growth ambitions and gain insights that translate into competitive differentiation.

No matter what your goals or market position, Accenture offers an unmatched breadth of services to help you strive toward high performance.

Copyright © 2009 Accenture
All rights reserved.

Accenture, its logo, and
High Performance Delivered
are trademarks of Accenture.

About Accenture

Accenture is a global management consulting, technology services and outsourcing company. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. With more than 181,000 people serving clients in over 120 countries, the company generated net revenues of US\$23.39 billion for the fiscal year ended Aug. 31, 2008. Its home page is www.accenture.com.

For more information on achieving high performance through Accenture's airline practice, contact:

Guido Haarmann
Global Managing Director, Airlines
guido.haarmann@accenture.com
+49 89 9308168617

North America
Michael Boushka
michael.e.boushka@accenture.com
+1 913 319 1119

Asia Pacific
Cameron Curtis
cameron.curtis@accenture.com
+ 61 2 9005 3969