THE PLATFORM FOUNDATION
Laying the groundwork now for future business recovery
The world has been turned upside-down by the COVID-19 crisis. Billions of people around the world are in lock-down, and the global economy has largely halted. Over the course of just a few days, business, education, and social activities have been forced into virtual spaces. The reach and importance of platforms at this time cannot be understated. Platform companies are enabling video conferencing, food, grocery and essential supplies delivery, AI-driven virus tracking, social connectivity, and entertainment content to an increasingly restless population. Platforms are the connective tissue that enables some semblance of normalcy amidst this historic disruption and must act now upon imperatives that come with this critical role, while laying the groundwork for future growth.
Based on our unique work in major platform hubs, from Silicon Valley to Seattle, and Shenzhen to Hangzhou, we believe platform executives should focus on five opportunity areas for short-term continuity and long-term success:

1. Ensure uninterrupted platform access to businesses and users around the world.
2. Enable changing user behaviors, and provide a seamless on-ramp for new users to quickly adapt to life while sheltering in place.
3. Form or rebuild long-term relationships with users and businesses.
4. Redouble efforts to provide trusted information, particularly about COVID-19.
5. Position to provide a rapid return to growth for customers and the global economy as a whole.

The COVID-19 crisis is a human tragedy that will have a lasting impact on our lives. Platforms are in a unique position to help resolve cross-industry challenges and will likely experience increased adoption with new digital behaviors that are expected to continue long after the crisis is over.

The time to act is now. This document outlines the practical steps you should take to help ensure your platform is ready.
Platforms are the backbone of the digital society and have the ability and responsibility to ensure uninterrupted platform access. The crisis has brought to the forefront the critically important role of platforms as the mainstay of the digital society. The last decade of investment in fiber and data centers – $250B in capex by the top 7 from 2018 to 2020 alone - and experience in serving massive scale have created globally resilient service infrastructures. Platform services dominate internet traffic: on a typical evening, streaming video makes up more than 1/3 of traffic. This has been magnified during the COVID-19 crisis, so much so that the EU Commissioner directly asked Netflix and other streaming providers to downgrade to SD video to protect the region’s critical communications infrastructure.

The system has largely coped, despite unparalleled and unpredictable demand. As home broadband use in the US grew 25% at peak time, and by up to 2x in the daytime, internet speeds across ten top US cities largely held steady.

New load largely comes from increased use of streaming services, video conferencing and social networking. Platforms have taken the weight of society’s need for information, to stay connected, work, operate businesses, and stay entertained. Platform availability and services must be sustainable from a human and system perspective and allocating resources to maintaining access is job number one.

Capacity is neither unlimited nor free, and prioritization is becoming increasingly important.

Hard decisions around protected capacity and tiered service levels are being made: For example, Microsoft adjusted feature availability in Microsoft 365 as Teams growth accelerated, and Amazon is prioritizing essential item and Prime member shipments.

Sources:
https://tbr.com/research/webscale-ict-market-landscape/
Open Vault, Moffett Nathanson analysis
Next Steps

• **Review end-to-end points of failure** and mitigate effects on sustainable practices and impact on the ‘front-line workers’ of the digital society (SREs, Live Site, DevOps, content operations) and mitigate.

• **Accelerate use of AI in key tasks** by more aggressively investing to forecast and manage capacity and carry out mission-critical tasks without reliance on heroic human efforts.

• **Critically review** tiered service offerings and product designs to optimize use of resources for priority audiences.

• **Help accelerate the journey to the cloud** for organizations that have seen the vulnerability of their business and the resiliency of platforms’ globally redundant networks.

• **Shift from crisis management to risk management and forward planning** to prepare for future crises.
Enable changing behaviors

COVID-19 is driving rapid digital behavior change as offline activities have been forced to become online in a short span of time. Behavioral changes that have historically taken years to manifest broadly have occurred in a matter of days.

Despite a 10x increase in video conferencing, ~40% of workers experience minimal impact to work. In parallel, pockets of free time are being unlocked: the average working American spends 12% of their waking hours commuting and is now devoting that time to work, spending time with family, and leisure activities. These new behaviors have been forced due to mandatory work from home and shelter-in-place policies, but it is likely that some new digital behaviors will stick when life returns to normal. Nearly 1/4 of Americans will continue their increased video conferencing behavior after COVID-19, while nearly 1/3 will continue increased levels of online shopping.

Platforms must lead with humility during this time of crisis, as these magnified digital behaviors will almost certainly benefit platforms over the longer term. It is imperative that platforms convert this energy to the enablement of products that aid large portions of the population.

Sources:
App Annie Data
Accenture / Google Surveys N=500 US General Population, 3/23
Accenture / Google Surveys N=500 US General Population, 3/23
Platforms have an opportunity to rekindle trust across broad segments of the population by enabling normalcy during a time of calamity and demonstrating responsible behavior toward information and people.

- **Provide tools and holistic services** such as training, tailored IT support, proactive notifications for feature changes and updates to rapidly equip new users with necessary knowledge to easily utilize each tool.
- **Educate newcomers** through intuitive product education and onboarding combined with proactive support.
- **Rekindle goodwill** by providing SMBs assistance, empowering users, and collaborating in public health efforts.
- **Infuse creative and innovative methods of working and social engagement** into existing products. Virtual breakout rooms, group chat and other little-used features have become accelerants to growth and helped drive healthy, inclusive ways of working.
- **Proactively identify and address user challenges** across tools, features, and services to sustain engagement and ensure reliability.
Build long term customer relationships

Business success or failure will be determined during the COVID-19 crisis. Some companies’ products will accelerate to scale. Others who fail to properly serve customers during the crisis will burn critical bridges. New unicorns will be created, and customer preferences will be solidified. COVID-19 is creating many firsts. Zoom Video had 768% growth in new installs in one week. 41% of online grocery orders in early March were from first time users. Even dating apps have seen increased first time usage. In parallel, consumers (77% of Americans) are worried about the impact that COVID-19 will have on themselves and their family.

Platform consumers are experiencing a mix of service-related issues as companies scramble to respond to the COVID-19 crisis. Consumers are closely watching how companies navigate issues and how they are treated. Encouragingly, less than a third of consumers feel that companies they regularly interact with are doing a poor job of providing support.

COVID-19 is an opportunity for platforms to develop positive and lasting relationships with users. Success is dependent on how platforms respond to and serve users during this crisis.

Sources:
Accenture / Google Surveys N=500 US General Population, 3/23
Work to develop positive relationships with consumers to help foster ongoing business.

- **Provide elastic and empathetic support** that proactively addresses challenges, accelerates onboarding, and enables normalcy.

- **Accelerate to scale** to meet growing usage and evolving expectations – those who fail to properly serve customers may damage long-term customer relationships.

- **Critically evaluate product and support roadmaps** to address market and consumer changes, identify new opportunities, and ensure user success.
Provide trusted information and combat bad actors

In an Accenture survey, Americans said they turned to news websites, television, and government websites ahead of social and search for information on the crisis. Nevertheless, American adults are exposed to information in social and search every day. Platforms have responded by actively promoting official sources. In China, Tencent’s anti-fake news platform Jiaozhen shows posted content alongside expert and official sources.

Misinformation has always pushed up against broad free speech arguments when forming policy. The tension is very significant in a scenario with broad-reaching public health consequences. Twitter created a policy for COVID-19, but designing for specific scenarios is simpler than universal policy.

The scale, speed, and seriousness of information dissemination has tested the ability of operations to keep pace. But information is just one target for bad actors. Amazon has deactivated thousands of price gougers and more than a million fake products and fake reviews. The opportunity for AI to help meet demand and adapt quickly to new threats has never been clearer.

Sources:
https://gizmodo.com/n95-mask-listings-on-amazon-are-flooded-with-fake-reviews-1842461668
Next Steps

- Critically review policies and encourage open conversations to develop greater collaboration across the platform industry.
- Refine the balance between human and machine, and accelerate investment in AI-supported operations.
- Review policies, AI, and operations to address price gouging, fake products, fake reviews, and general commercial exploitation.

“Fake news spreads faster and more easily than this virus and is just as dangerous.”

- WHO Director General, Jane Ellison

https://www.who.int/dg/speeches/detail/munich-security-conference
Enable rapid return to growth

The crisis has hit industries hard and fast. Many are deep in response mode and need help now to survive. As they emerge from the crisis, many will reflect on the imperative and opportunity to adapt to thrive. Those late to optimize supply chains, move to the cloud or omni-channel strategies, and those overly reliant on specific audiences or channels, will see competitors come out faster and stronger. Companies on the brink of failure will turn to platforms for their resiliency, scale, cost effectiveness, enterprise services, and audience.

Platforms are helping stand up eCommerce, shift advertising online, and access new audiences. Studios were quickly able to reach home audiences with new releases via new channels like Amazon Prime Cinema as the US weekend box office fell from $75M to zero in a month. Restaurants pivoted to delivery; Uber Eats self-service sign-ups grew 10-fold in a week.

Advertising platforms can help buyers adapt to new behaviors and budgets. As consumer confidence returns and ‘new normal’ behaviors are established, platforms will see early signals in their data and be able to guide customers to focus their spend and maximize ROI.

Sources:
https://www.boxofficemojo.com/weekend/2018W03/estimates/?ref_=bo_wee_nav
https://www.usatoday.com/story/money/2020/03/15/coronavirus-apple-card-holders-can-apply-skip-interest-payment/5055385002/

Platform companies have applied resources towards their ecosystems, supporting SMBs, merchants, restaurants, and gig and hourly workers, directly through funding or indirectly by changing policy – often with mutually beneficial outcomes or motives:

• Uber Eats suspended fees for independent restaurants - while signups grew 10x
• Amazon waived some storage fees for merchants - repurposing logistics capacity away from returns
• Apple eliminated some fees for Apple Card holders – provided they enroll in their Customer Assistance Program.
Next Steps

- **Help companies across industries transition to the cloud and AI.** Scale up go-to-market programs, support, and implementation services.

- **Help access new audiences** via digital channels as legacy policies come under review, from the exclusive cinema release window to car dealerships.

- **Help identify the role for AI**, including customer support and service where major issues with call centers and service give new impetus to conversational AI.

- **Ensure platforms are ‘built global’** (support localization, licensing, payments, local data centers) to help recovering industries in specific regions.

- **Provide continued support to ecosystem partners** as the economy recovers, and review fees to compensate for volume. Support will translate to loyalty.

- **Engage and educate advertisers early** to bring ad budgets back online quickly, and demonstrate continued ROI for new customers that shifted spend to digital in the crisis.
How do I get started?

Platforms play a vital role in helping their employees, customers, ecosystem partners and communities weather the COVID-19 crisis. Leaders must act now to create normalcy and stability while laying the foundation for future growth and protection against future crises.

1. **Develop robust programs** to support employees and other workers as they return to full productivity, and carry forward positive new ways of working which provide a healthy, sustainable environment long-term.

2. **Scale and elevate the support experience** to the same standard as product experience with elasticity to quickly anticipate and resolve customer challenges in times of crisis.

3. **Revisit product roadmaps** and portfolios in light of changing consumer demand for digital products in order to stay relevant after the crisis.

4. **Build a plan for future risk management** in parallel to current crisis management, and review the balance of human and machine to accelerate the use of AI.

5. **Adapt to new behaviors** in remote working, communications, and entertainment, and evangelize these behaviors beyond major platform hubs.

6. **Help businesses and organizations harness technology** and new channels for robust recovery and long-term growth, including cloud and AI, omni-channel, and advertising.

7. **Prioritize** ecosystem partners and new customers to secure long-term loyalty.

8. **Seize this unique opportunity** to redefine the relationship with government and society.

9. **Lead with humility** in transitioning to the “new normal” and supporting recovery in society and the economy.
How Accenture can help:

**Build and Deepen Customer Relationships**
Bringing together the latest learnings on buying behaviors, user onboarding, engagement and support, we can help design and operate GTM programs, marketing analytics, customer support and more to help ensure platforms emerge with strengthened, long-lasting customer relationships.

**Manage Business Continuity & Risk**
We can help develop robust risk management planning and intelligent content operations to reinforce trust, and brand actions that may help reset platforms’ relationship with government and society.

**Accelerate Adoption of Services**
We work with platforms to help design and run commercial programs to accelerate adoption of cloud and AI services, communications and omni-channel sales, marketing, and support.

**Reimagine Infrastructure and Operations**
We can help apply smart technologies like Accenture’s Applied Intelligence Platform (AIP) to help manage capacity, speed up lead generation and ad sales, and improve the effectiveness of a distributed workforce including contractors and partners.

**Design and Execute Ecosystem Growth Programs**
We can help enable the right GTM and engagement programs, AI tools, services and capabilities that support struggling SMBs, advertisers, and partners who are critical to the success of platforms and local communities. We can also help accelerate third-party developer ecosystems by creating a plan to attract and incent users who may have new, innovative ideas for work, education, and broader society.

**COVID-19 and Future Crisis Planning**
What worked well in Asia? What will the new normal look like and what does it mean for specific platform companies? We can help you apply specific insights and global Software & Platforms best-practices as early-hit nations, such as China, and other industries begin to emerge from the crisis.
To help our clients navigate both the human and business impact of COVID-19, we’ve created a hub of all of our latest thinking on a variety of topics.

Each topic highlights specific actions which can be taken now, and what to consider next as industries move towards a new normal.

From leadership essentials to ensuring productivity for your employees and customer service groups to building supply chain resilience and much more, our hub will be constantly updated. Check back regularly for more insights.

VISIT OUR HUB HERE
About Accenture

Accenture is a leading global professional services company, providing a broad range of services in strategy and consulting, interactive, technology and operations, with digital capabilities across all of these services. We combine unmatched experience and specialized capabilities across more than 40 industries—powered by the world’s largest network of Advanced Technology and Intelligent Operations centers. With 505,000 people serving clients in more than 120 countries, Accenture brings continuous innovation to help clients improve their performance and create lasting value across their enterprises.

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