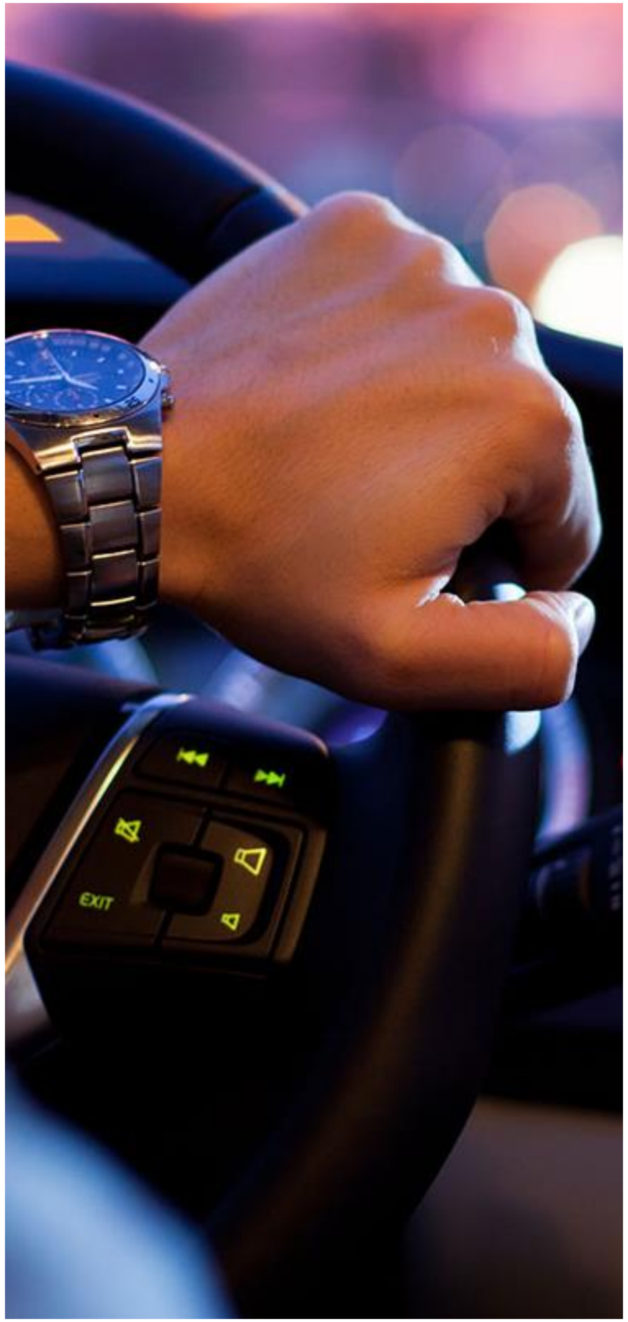
PAGAMON

The automotive industry & **MOBILITY AS A SERVICE** in France

Transform to better meet consumer expectations and take advantage of the mobility of tomorrow



THE NEW VEHICLE MARKET: **A CHALLENGE FOR CARMARKERS**

In 2017, 48% of new vehicles were sold to individuals, 22% to businesses, 18% to dealers and 12% to rental companies. Direct sales to dealers or short-term leasers are much less profitable. However, the proportion of sales to individuals and companies is declining each year: 77% in 2010, 72% in 2015 and 70% in 2017. Customers who used to buy new are now looking for recent second-hand cars. Direct sales and sales to rental companies are a second step in satisfying this demand.

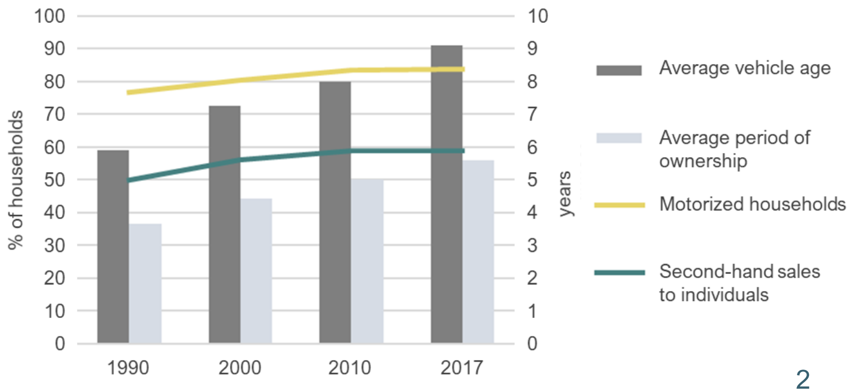
New car sales (excluding LCVs) **rose by 1.88% between 2018 and 2019 in France**, according to the CCFA, with a total of more than 2.2 million new cars sold. Overall, **corporate vehicle purchases were the main driver in 2019**. In fact, **new vehicle sales to individuals declined by 7% between 2018 and 2019**[1]. This is mainly a consequence of natural market trends:

- **the household car ownership rate** (83% in 2017) **is close to its maximum**: new vehicle sales are based on the renewal of the vehicle fleet
- the average time of vehicle ownership has increased from 3.7 years in 1990 to 5.6 years in 2017: **the fleet renewal rate is slower**.

Faced with this market decline and the emergence of new competitors, **manufacturers must propose complementary offers and diversify**.

In addition to passenger cars, automakers are tackling a **booming mobility market**.

HOUSEHOLD AUTOMOTIVE EQUIPMENT



NEW FORMS OF **MOBILITY ARE GAINING GROUND**

New forms of mobility are growing and pose a challenge to carmakers, who must deal with new competitors and (re)position themselves as mobility players in the broadest sense.

Indeed, even if 6 out of 10 **urbans** (conurbations with more than 20,000 inhabitants) still declare themselves dependent of their personal vehicle, they **are more willing to give up their personal vehicle if they have a higher use of shared vehicle solutions**(2).

In this respect, car-sharing, public transport and self-service solutions are gaining popularity. The success of BlaBlaCar, a long-distance car-sharing service(8) is undeniable (+71% in sales, +17M new members in 2019). In 2016, public transportation remained dominated by cabs, which accounted for 78% of the offer. **The share of VTC increased significantly**, from 22% in 2016 to 42% in 2018(4).

	2019	2018	Variation
New vehicle sales (units)	981 943	1 055 853	-7 %
PEPME sales (M€ - *units*)	220,3 *605 300*	167,4 *576 600*	+31 % *+5 %*
RATP (million travellers) (7)	3 324	3 389	-1,9 %
Blablacar (long distance users in thousands)	> 70 000	50 000	+40 %

At the same time, sales of **PEPME** (Personal Electric Powered Mobility Equipment), particularly **electric scooters**, have been **growing at a rapid pace**(3). Until June 2018, self-service electric scooter systems did not exist!
On the other hand, the number of self-service bicycle systems has almost doubled in ten years, from 32 to 57(5). The multiplication of these systems reflects growing demand: trips using the *Vélib' Métropole* doubled in between 2019 and 2020(6), despite confinement measures.
New forms of mobility therefore seem to have won over many French people.

CITIES ARE CHANGING AND **MAAS TOOLS ARE BEING DEVELOPED** TO MEET THE NEED OF URBANS

Mobility as a Service (MaaS) is a multimodal urban mobility concept that puts mobility at the service of users. With the multiplication of mobility offers, the need for MaaS tools aggregating all the offers - traffic information, trip planning and payment - becomes more important. The most advanced tools enable users to **choose, book and pay for their multimodal trips in a single step at the end of the month**. The most accurate ones will allow you to optimize the itinerary according to network usage, traffic or possible breakdowns.

Many French cities are taking the plunge, such as Saint-Etienne with Moovizy 2, conjointly developed by Transdev and the city[9], Paris with the MaaX pilot supported by the m2i project to which Renault and PSA[10] are contributing, Dijon with the Divia, Annemasse with the RATP[11] and others.
The possibilities offered by MaaS embody the idea that freedom will no longer reside in possessing a vehicle, but in the ability to choose the most advantageous and practical mode of transportation for a given trip.

Beyond MaaS, **cities are seeking to transform themselves to reshape urban mobility**. Numerous projects are underway or under study:

- Urban cable cars in Brest, Medellin, New York and London, for example
- Flying cab with Airbus, Volocopter, Uber/Hyundai
- Cab robot/autonomous vehicles with Navya, the first cab robot tested in France, Renault, Google...
- Robotic parking with Stanley Robotics tested at Lyon airport

Focus on Moovizy 2

The only service today in France that allows users to consult, choose, book and pay for trips with a single application.

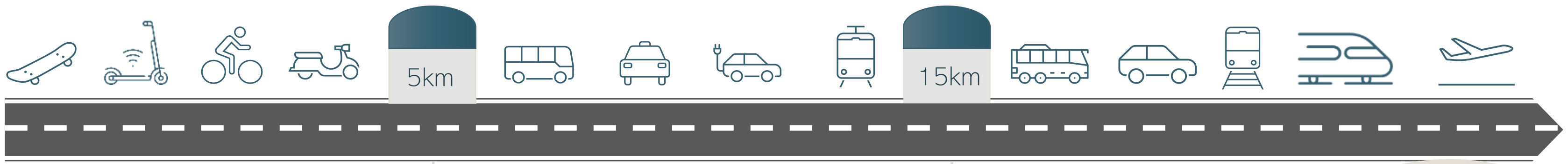
5 modes of transportation: public transportation, self-service bicycles (Vélivert), car-sharing (Citiz), carpooling (Mov'ici), cabs, etc.

25,000 users

Launched in 2019 to replace Moovizy (2016)

OVERVIEW OF **MOBILITY MEANS**

MICRO-MOBILITY	MEDIUM MOBILITY	HIGH MOBILITY



Micro-mobility, long dominated by self-service bicycles, has seen the **arrival of new free-floating players**: scooters, bicycles, scooters, all **driven by innovation in electric mobility**.

Medium mobility has been disrupted by **VTC's**, and particularly Uber, which is attacking historic cabs with a new business model. Car-sharing vehicles are also expected to grow 20% per annum until 2025(12).

In addition to the carpooling boom, high mobility has also evolved. For example, the air, rail and road passenger transport sectors have expanded with **low-cost offers**.

The mobility offer has diversified at lightning speed in recent years. It is safe to say that tomorrow's models will amplify today's trends: **cleaner, shared, multimodal, intelligent and more personalized**.

Green | Multimodal | Shared | Autonomous | Connected

PERSONALIZATION

THE ROLE OF CARMAKERS **IN THESE NEW FORMS OF MOBILITY**

As the profitability of traditional carmakers declines and new entrants enter the mobility market, the time has come for carmakers to rethink their business model to drive profitability. 5 business models seem appropriate:

PRODUCTS

Traditional carmakers – High-end segment

To maintain margins and profitability in the long term, manufacturers can focus on premium or even luxury segments. This market, although small in size, offers significant potential for profitability. The share of premium in total registrations (12%) is still low in France, much lower than in Germany or the United Kingdom.

B2B Carmakers – Supplier of rental/share car fleets

As car-sharing market and rental models develop, the role of manufacturers may focus on providing more vehicles for mobility services.

Fleet operator

In a model driven by rental vehicles, car sharing, manufacturers have a card to play by integrating the downstream end of the value chain, i.e. fleet management. Their knowledge and experience of customer mobility needs will represent a competitive advantage in this area.

SERVICES

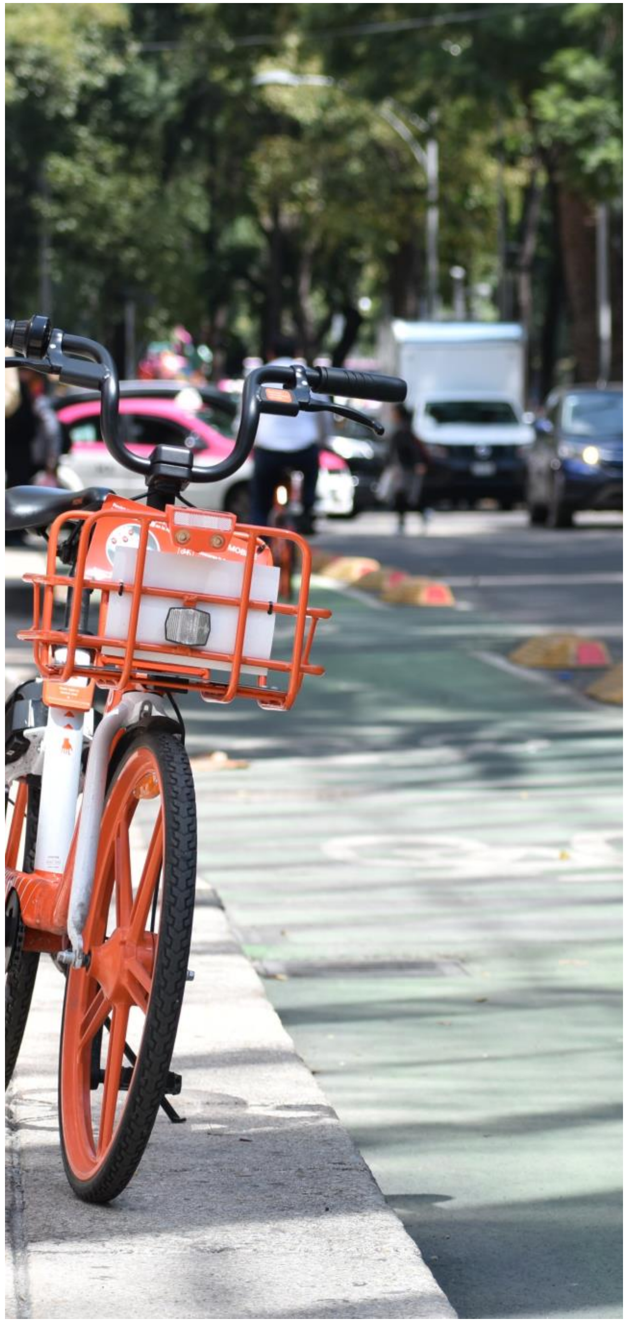
Automotive mobility service provider

By relying on a more service-oriented approach, manufacturers can offer car-related mobility services (car-sharing, carpooling, VTC, etc.).

End-to-End Mobility Service Provider – Mobility as a Service

Beyond car production, manufacturers can position themselves as mobility service providers, with a single mobility platform integrating multiple means of transportation and services from the point of departure to the last mile, from short-term car rental to parking reservations.

Source : Accenture. 2018. Mobility as a Service, mapping a route towards future success in the new automotive ecosystem



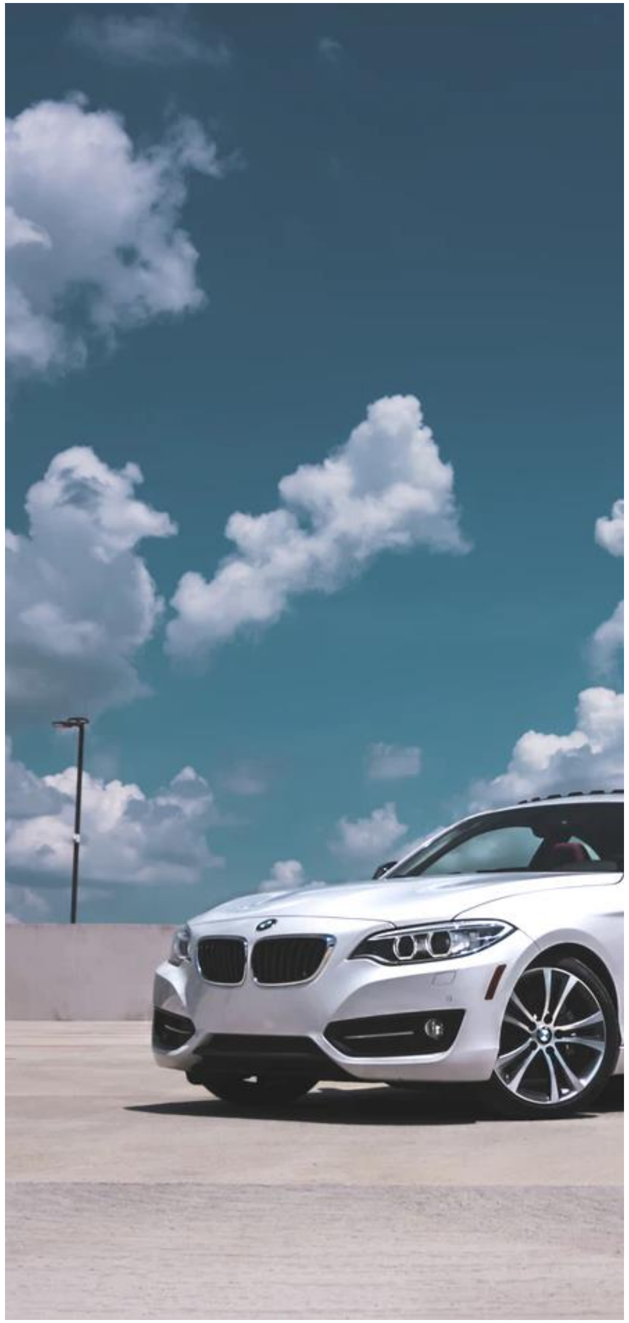
MATURITY OF **CARMAKERS' MOBILITY SOLUTIONS**

These new products and services revolve around micro-mobility. Connectivity, autonomous vehicles, on-board entertainment, ancillary services (electric charging service, parking management...) are opportunities for medium and high mobility. Although the number of mobility services is increasing, few manufacturers are still offering a single platform centralizing all their mobility solutions.

Legend: Free2Move: name of the identified solution/project

No solutions — Not very mature — Slightly mature — Mature

		RENAULT-NISSAN	PSA GROUP	BMW GROUP	VOLKSWAGEN AG	TOYOTA	FORD
Product	Micro-mobility		Cycles, e-Kick	Cycles, X2Cit, e-Scooter (electric scooter), KKA S1 (e-skate)	Seat Urban Mobility	Skip, VEB pedestrian zone, Accessible People Mover	Spin
	Medium mobility	Core business of carmakers					
	High mobility	Core business of carmakers					
Mobility services	Multimodal platform		Free2Move	Reach Now/Free Now		Kinto	
	Rental/car sharing	Renault Mobility, Karhoo, Zity, Klaxit partnership	Free2Move, participation in Koolicar	ShareNow	WeShare, Audi on demand, Seat MÓ, Porsche Passport…	Yuko	Ford Credit, Go!Drive
	VTC	Marcel (sold in october 2020)	Uber, AlloCab, CleverShuttle via Free2Move	FreeNow	Cooperation with Uber for Uber Green	Deal and investments withUber, Grab	Shuttle service Trolley shut down
	Parking		Free2Move	ParkNow			
	Parking payment			ParkNow	PayByPhone		
Other services	Onboard entertainment	Not very mature	Not very mature	Not very mature	Not very mature	Not very mature	Not very mature
	Connected vehicles/other	Easy Connect, partnership with Otodo	Qeo from Technicolor	ConnectedDrive, Glympse, ChargeNow	We Connect	THR-3	Ford Pass, partnership avec Gnewt (last kilometer delivery)



FOCUS ON **BMW** AND THEIR **MOBILITY OFFER** YOUR NOW

Daimler and the BMW Group created the joint venture YOUR NOW, an innovative player in urban mobility:
5 separate mobility joint ventures (REACH NOW, SHARE NOW, FREE NOW, CHARGE NOW, PARK NOW)
More than 1 billion euros invested
+90 million customers, +44% growth between the beginning and end of 2019

REACH NOW for **multimodal services**, a range of mobility services via a single multimodal platform. REACH NOW applications offer a range of options for getting from point A to point B, allowing users to book and pay directly for their public transport and various mobility options, such as carpooling, bike rental, etc... 6.7 million users - *Not available in France*

SHARE NOW for **car sharing**. It is a floating car-sharing service that allows customers to rent vehicles and make payment via their smartphone anywhere, anytime. The fleet will be expanded to include a wider range of models and to increase market coverage. 4 million customers, 20,000 fleet vehicles, 31 cities

FREE NOW for cabs. This solution offers: **cabs, private drivers with rental vehicles and electric scooters**. 21 million customers in Europe and Latin America, 250,000 drivers

CHARGE NOW for **electrical charging stations**. This solution allows the user to localize, use and pay easily /quickly for charging stations in 25 countries. Digital Charging Solutions GmbH develops simple and standardized access to public charging stations for car manufacturers and fleet operators. Customers benefit from cross-border access to an extensive charging network. 100,000 charging points, 25 countries, 250 charging station operators

PARK NOW for **on-street or off-street parking**. This service allows users to reserve parking spaces, manage the duration of parking and makes it possible to enter and exit without a ticket in public garages, as well as to pay parking fees electronically. +30 million customers in Europe and North America, 1,100 cities

FROM CARMAKER TO MOBILITY PROVIDER: A SINUOUS PATH

More and more manufacturers are now looking to position themselves as mobility service providers, offering various solutions such as flexible rental or VTC services: **ultra-competitive activities where margins ultimately remain very low**. Among their competitors, manufacturers also find themselves up against public transport operators, with whom they have sometimes chosen to cooperate.

Public transportation operators no longer have the capacity to develop mobility solutions that cover all user needs - as evidenced by the proliferation of micro-mobility and VTC solutions. In this context, keeping pace with pure players means rethinking the balance of power between mobility operators and **paving the way for enhanced collaboration**, enabling them to take advantage of opportunities and data offered by digital technology. Manufacturers could thus play the role of mobility service providers.

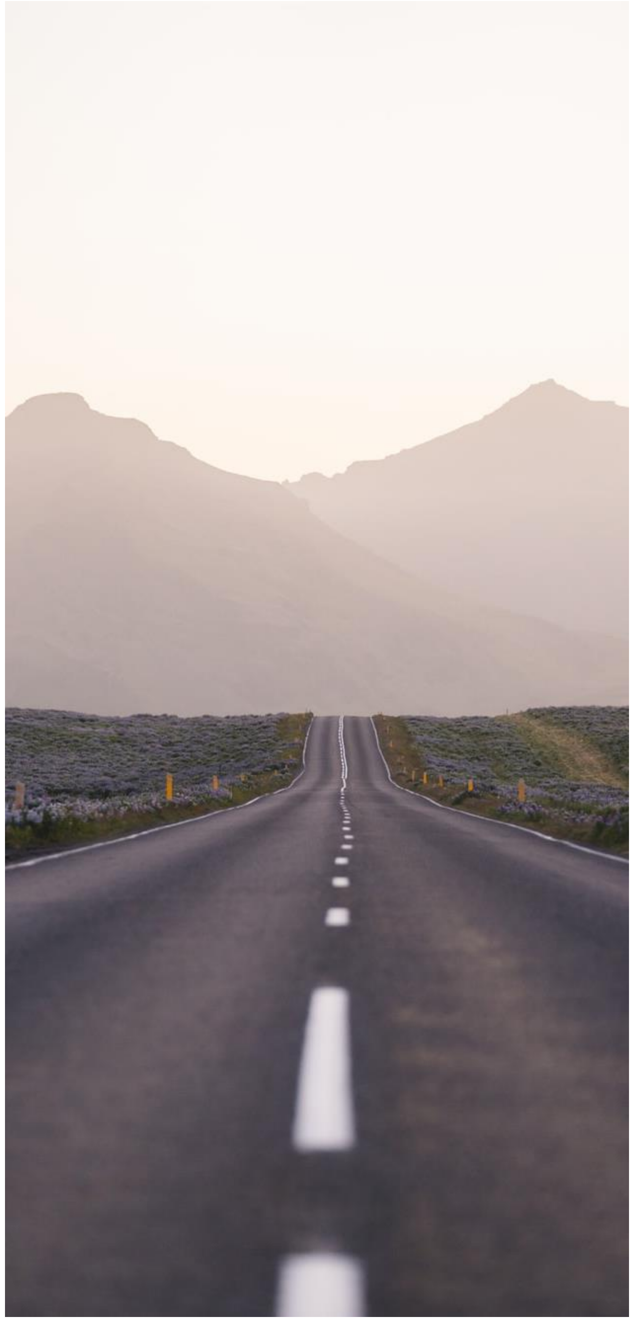
Here are some key success factors:

1. **Scale:** mobility platforms leverage key assets to define a scale of operations and a differentiating value proposition.

2. **Revisiting the value chain**: new players, both pure players as well as manufacturers or traditional players from other sectors are detecting new opportunities in the mobility sector and seem to want to converge towards a model aggregating mobility solutions. Although the boundaries between core businesses are blurring, the historical know-hows of an automotive manufacturer remains far from those of emerging mobility players, but remain a capitalizable strength: new uses such as connected services, data and sensor use; new business such as electric, autonomous, connected vehicles, etc.

3. **Taking the ecosystem into account:** the lack of integration between different modes of transport, private and public, is the major obstacle facing users. This generates friction for users, low level of service and/or adoption, which in turn creates opportunities for new entrants. As a result, the value chain once controlled by incumbent operators is now overburdened by multiple players.

The (re)positioning of carmakers as mobility providers will therefore remain a challenge to be pursued over the long term.



MOVING FURTHER AFIELD: TOMORROW'S MOBILITY

WHAT COEXISTENCE?

Many different players will drive tomorrow's mobility, which will tend to be electric, autonomous and shared.
The proliferation and multiplicity of mobility solutions nevertheless raises the question of their coexistence with specific solutions used by different transportation operators. Will all carriers agree to share their data with operators? What associations with existing ticketing? What is the future for conventional public buses with drivers that are inflexible on routes and schedules when other shared solutions allow them to go to the desired point at a specific time? What role for the public network which will compete agaisnt shared autonomous cars? What role for manufacturers when vehicle ownership will no longer be a priority for urbans? So many questions that will have to be answered in the coming years...
While the role of driver' "technician" will fade, the moderator aspect remains essential. Mobility cannot be dehumanized: the need for regulation, animation and assistance remains necessary for these solutions to work properly.

WHAT RISKS?

New forms of mobility, such as the autonomous car, car-sharing and self-service micro-mobility are leading to a rethinking of the driver's role. In the case of an autonomous vehicle in particular, the responsibility is no longer borne by the driver, but by the software manufacturer. The probability of having an accident is lower in a car driven by an operating system. Part of the car fleet would reduce risks, and most at-fault accidents would be caused by drivers. The drivers' insurance premium, carrying this loss rate, would increase. Will it then still be profitable to drive? For insurance companies whose business model is based on accident risks, change is therefore to be expected.
So, in the broadest sense, the issue of transportation safety is shared by all stakeholders, especially industrials and carmakers. This safety issue is seen as central to R&D strategies for autonomous vehicles, as well as to the communication of these technologies, the use of data, etc. Consequently, ethical issues directly concern these security issues.

MOVING FURTHER AFIELD: TOMORROW'S MOBILITY, PERSPECTIVES

WHAT SCALE?

While mobility solutions are generally tested on a city scale, wouldn't the most successful form of mobility as a service (MaaS) involve deploying it on a larger scale, nationally or even internationally? Indeed, projects are under way on a larger scale, and a European alliance has been created with the aim of building a common European approach. The main objective is to facilitate a single, open market and full deployment of MaaS services.

Defining a legal framework is necessary: regulation of new mobility players, coordination of transportation supply, management of users' private data, etc. At the European level, Regulation 2017/1926 of May 31, 2017 sets the establishment of a national access point for mobility data.

WHAT ENVIRONMENTAL IMPACT?

Intelligent traffic management will encourage road users to use the best means of transport and routes. In addition to facilitating and improving the traveler's experience, it is also beneficial for the environment since congestion, which is synonymous with pollution, can be reduced with better traffic management.

Although micro-mobility solutions are multiplying and are less polluting to use, the production and charging of new micro-mobility solutions are subject to debate because of the generated pollution.
Also, if a car remains immobilized more than 97% of the time, car sharing does not necessarily imply a reduction in traffic. While some people will abandon their cars in favor of shared solutions, others, who do not own a car, could multiply their trips because of the ease of access to various routes. These effects need to be closely monitored and analyzed.

WHAT SOCIAL IMPACT?

The risk of social and digital exclusion must be taken into account.
Mobility solutions will be digital. However, not everyone necessarily has a smartphone or access to mobile data. This can lead to the social isolation of certain groups of citizens who would no longer be able to travel and have a polarizing effect between those who are connected and those who are less connected.
Also, the geographical coverage and prioritization of access to these solutions would lead to territorial disparities. Will the rural environment be a robot-mobile desert like the white zones for mobile telephony and the Internet today?
What non-digital and/or adapted alternatives according to territories will be addressed to cover all the population's needs?

OUR KNOW-HOW AT THE SERVICE OF TOMORROW'S MOBILITY

1 OFFER CREATION

Consumers' expectations in terms of mobility are leading to new offers, responding to these new needs.

Pagamon's experience in building commercial offers means that it supports its customers: from understanding needs, to the launch of the offer, and creating the business plan.

To mobilize the expertise and creativity of your employees towards the creation of new offers, Pagamon consultants organize and animate ideation workshops (design thinking, lean startup...), formalize your offers and pilot business plans

2 IMPROVING CUSTOMER EXPERIENCE

Customer experience has become a key to business success.

Pagamon supports its customers in building and optimizing their customer journey. Exploiting various data sources (customer satisfaction data, customer journey data, usage data, technical data, etc.) is becoming essential to improve the customer experience at all levels.

We can partner with K-mino, a specialist in semantic analysis, to give you and optimal understanding of your customers' needs.

3 DEFINITION OF THE DIGITAL ROADMAP

Digital will be at the heart of tomorrow's mobility.

To support this change, Pagamon helps its customers structure their digital vision and implement it. As data plays a major role, we can help to set up a data governance and optimize its use to better serve your activities.

PAGAMON

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APPENDIX

PAGAMON'S ASSETS TO **ACCOMPANY YOU**

OUR SOLUTIONS

STRATEGY

- Construction of business plans
- Market study of new mobility services
- Development of new mobility services/offers
- Strategic due diligence

CUSTOMER EXPERIENCE & DIGITAL MARKETING

- Analysis and interpretation of customer/user behavioral data
- Optimization/redefinition of the customer journey
- Platform/application deployment support

INNOVATION & DEVELOPMENT

- Construction of a technology roadmap and product portfolio
- Internal/external innovation processes and approaches
- Excellence in product/process development

DIGITAL TRANSFORMATION

- Definition of the digital roadmap
- Accompaniment of digital projects (framing, PMO, scrum mastering, valuation, portfolio management...)

ORGANIZATION

- Change management
- Reorganization of new businesses
- Agile transformation

PAGAMON'S ASSETS

EXPERTISE IN THE MOBILITY SECTOR AND ITS ISSUES

Pagamon draws on its long experience in the service of various departments of one of the largest automotive groups in the world.

QUALIFIED CONSULTANTS

Coming from the best ranking schools, our multidisciplinary teams have the key skills to ensure the success of your projects. All our consultants are trained in Agile principles and are certified Scrum Masters.

AN INNOVATIVE MINDSET

Founded in 2013, Pagamon has made innovation one of its core values. We strive to offer you an innovative approach and solutions to your problems.

FOCUS ON 3 CARMAKERS' **MOBILITY SOLUTIONS**

	RENAULT-NISSAN	PSA GROUP	BMW GROUP
Shared	• Renault Mobility application Partnerships : • Zity, free fleet car sharing (ZOE) • Ikea, Bricorama, Mr.Bricolage... to allow customers to transport their purchased goods from the store to their homes. • Horn, carpooling to and from work	• Acquisition of a stake in Koolicar, a car-sharing platform for individuals	• DriveNow Car Sharing Service becomes ShareNow • Glympse, position communication by GPS tracking to family members, friends or colleagues
Multi modal	• Takeover and participation in start-ups with Renault MAI (Mobility as Industry). • Takeover and relaunch through its subsidiary RCI Bank & Services, the Paris Region VTC company Marcel (sale in October 2020)	• Connected services and mobility offer carried by the Free2Move brand • Acquisition of TravelCar, specialized in parking lot reservations and car rentals (with Free2Move)	• ReachNow multimodal application, a complete mobility planning solution • VTC FreeNow Service • ParkNow Service
Electric	• Range of new electric vehicles • Agreement with VTC Uber to electrify their fleet	• Range of new electric vehicles • Quadricyle, AMI, electric mobility solution from Citroën	• Range of new electric vehicles • ChargeNow service, access to charging stations worldwide
Autonomous	• Concept and concept cars (EZ-GO, EZ-PRO, EZ-ULTIMO, EZ-POD) • First experimentation of a shared and autonomous on-demand mobility service (Rouen Normandy autonomous Lab)	• AVA program "Autonomous Vehicle for All"	• BMW's autonomous fleet testing: Personal CoPilot, a collection of data from sensors and vehicles placed in various traffic situations in Germany, the United States, Israel and China • Smart Driving, Driving Assistant Pack Professional function

Carmakers have understood the stakes associated with alternative mobility and have begun investing in it. BMW Group, a leader in this area with Daimler, has already built a fairly complete offer around mobility services.

SOURCES

(1). Le Parisien. 2019. Les ventes de voitures aux particuliers ont plongé en 2019

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SELECTED REFERENCES – PAGAMON

	1 OFFER CREATION	2 CUSTOMER EXPERIENCE	3 DIGITAL TRANSFORMATION
1 – Creation of a digital car rental offer for individuals in Europe	X		
2 – Construction of a distributor's business plan to maintain its distribution contract for the period 2018 - 2023	X		
3 – Definition of the 3-year brand strategy for a niche luxury cosmetic brand		X	
4 – Accompaniment and coordination of the digital transformation for an automotive engineering department			X
5 – Accompaniment and coordination of the digital transformation of Manufacturing and Supply Chain departments			X
6 – Manage the development and deployment of a mobile app & online platform to contribute to the follow-up of the CX program	X	X	X
7 – Rebuild customer experience and deploy it worldwide		X	
8 – Connected services' governance diagnosis			X
9 – Framing of a breakthrough innovation project for the Thermal Comfort Service	X		
10 – Analysis of the potential of a technological products' offer for the after-sales market	X		

REFERENCES – PAGAMON

OFFER CREATION

1 Automotive

Creation of a digital car rental offer for individuals in Europe

SKILLS

- Workshop organization
- PMO
- Offer definition & implementation
- Organization

OUTLINE

- The customer wanted to develop and put in place a fully digital offer for its private lease service, for which the customer journey would be totally online, in the main European countries. Renault's main corporate and local managers were implicated in this project
- Pagamon participated in the coordination and animation of cross-functional workshops to build the offer with 4 working groups: value proposition, customer journey, business organization and organization case

APPROACH

- Workshop organization and animation: Pagamon helped the customer organize and drive the 4 cross-functional teams by synthetizing and analyzing the content and the results of each workshops
- Feasibility analysis: between workshops, Pagamon had conducted multiple researches and studies to determine if the proposed solution was doable in a short period
    - Two pain points were identified in the digital user journey: how could the platform be both global and local for every country
    - Furthermore, Pagamon supported its client in the definition of a new business organization
- Market analysis and customers' identification: Pagamon conducted research and analyses to identify market opportunities and customer expectations

RESULTS

- Final deliverable for the administrative board with Pagamon results and recommendations
- Successful coordination and animation of the working groups
- Market studies and customer insights
- Organization and roadmap for the project's implementation

REFERENCES – PAGAMON

BUSINESS PLAN

2 Automotive

Construction of a distributor's business plan to maintain its distribution contract for the period 2018 - 2023

SKILLS

- Strategy
- Financial analysis
- CRM

OUTLINE

- The client wishes to demonstrate its ability to meet the carmaker's needs in terms of sales increase, market share gain and CRM
- The stake was to conserve the distribution contract for the period 2018 - 2023

APPROACH

- Tunisian automotive market analysis (sales volumes, market share, entry restrictions (quotas, parallel market…)
- Financial analysis assessment
- Strategic plan assessment for the distribution network development and sales increase by 2023
- Recommendations to improve client's CRM and digital communication to meet Opel's expectations

RESULTS

- Identification of capacities to increase sales (models manufactured in the client's CKD plant))
- Sales projections by 2023 beyond the carmaker's expectations
- Realization of a roadmap for the implementation of the client's commitments to the carmaker

REFERENCES – PAGAMON

STATEGIC MARKETING

3 Cosmetics

Definition of the 3-year brand strategy for a niche luxury cosmetic brand

SKILLS

- Strategy
- Workshop animation
- Benchmark
- PMO

OUTLINE

- For a luxury perfume brand, belonging to a leader in the Beauty industry, consulting support in defining, building and presenting the 3-year brand strategy. Final objective being the presentation to the Global Group CEO

APPROACH

- Definition of the presentation template and brand strategy story telling. Integration of the various brand prerequisites and compulsory figures
- Global project coordination with the CEO (presentation date as the ultimate deadline) : retro planning, phasing, workshop scheduling and preparation, synthesis of inputs from different departments, task sharing...
- Main axes of work:
    - Market and distribution channel strategy
    - Product offer development
    - Repositioning the brand's universe and markers
    - Definition of strategic initiatives focused on brand awareness, conquest, loyalty and the move upmarket
    - Optimization of customer data/commercial performance (obtaining, dissemination, utilization)
    - Cross-channel CX consistency

RESULTS

- A strong 100-slide presentation on the 3-year strategy
- Pagamon reconducted for an additional customer experience consulting mission

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REFERENCES – PAGAMON

DIGITAL TRANSFORMATION

4 Automotive
Accompaniment and coordination of the digital transformation for an automotive engineering department

COMPÉTENCES

- Digital transformation
- PMO
- Diagnosis
- Organization

OUTLINE

- In a context of product (autonomy, connectivity) and business model (car sharing, data management and resale) transformations, the client is launching a major digitalization program aimed at capturing new business, improving performance and reducing costs
- Within this framework, the engineering department is developing its own digital transformation plan

APPROACH

- Within the framework of an "Employee-Centric" project, identification of key engineering populations, and interview campaigns within these populations order to capture the difficulties/needs related to digital technology
- Management of the digital project portfolio, presentations to the steering committee and top management
- Preparation and animation of monthly decision-making bodies piloting the global digital engineering strategy
- Setting up and running digital plan steering bodies within regional development centers: aligning strategies between Corporate and Regions, preparing for the handover of digital projects to the Regions, sharing digital best practices, etc.
- Framing, prioritizing, piloting initiatives promoting digital culture: internal communication, training (data, agility), ideation workshops, learning expeditions, internal network of "Digital Makers", intrapreneurship, etc.

RESULTS

- Frameworks for the launch of new digital initiatives: RPA, development of collaborative applications, sharing digital best practices, etc.
- Implementation of a digital project value management process, prioritized portfolio
- Setting up corporate and inter-regional decision-making bodies, a "*Digital Makers*" network
- Communication material on digital initiatives for top management

REFERENCES – PAGAMON

DIGITAL TRANSFORMATION

5 Automotive

Accompaniment and coordination of the digital transformation of Manufacturing and Supply Chain departments

SKILLS

- Digital transformation
- PMO
- Diagnosis
- Organization

OUTLINE

- The client is deploying a digital transformation program for its plants around the world. This transformation is key to meeting today's expectations in terms of customer satisfaction, production agility, competitiveness, growth and social, societal and environmental responsibility
- The project consists of supporting the client in this transformation plan by defining and monitoring its digital strategy, managing its portfolio of digital projects and accelerating innovation

APPROACH

- Support in defining and monitoring the digital strategy: prioritization of business needs that can be addressed by digital, technology and data exploitation; creation of short and long-term roadmaps to meet these business needs; implementation of scorecards assessing the digital maturity of plants; organization and management of quarterly strategic reviews to align business and plant digital strategies with the program's strategy
- Digital project portfolio management: animation and support of the network composed of project pilots; organization and animation of bi-monthly meetings to follow the deployment of factory projects; follow-up of agile project piloting and value creation with management control
- Acceleration of innovation: information monitoring of all plants and respective digital innovations; improvement and animation of the network of digital players; information and technology monitoring of the ecosystem of digital start-ups linked to the industry; meeting groups and start-ups "techs" to anticipate future technological breakthroughs and to orient the program's strategy accordingly

RESULTS

- Framing the launch of new digital initiatives: visual control using deep learning algorithms, deployment of collaborative applications on blockchain, use of chatbots in factories, etc.
- Implementation of a Value Monitoring process for digital projects, prioritized portfolio
- Implementation of Group and inter-regional decision-making bodies and a "Digital Champions" network
- Communication material on digital initiatives and the application of transversal technologies in the context of manufacturing (artificial intelligence, virtual and augmented reality, etc.) for top management

REFERENCES – PAGAMON

CUSTOMER EXPERIENCE

6 Automotive

Manage the development and deployment of a mobile app & online platform to contribute to the follow-up of the CX program

SKILLS

- Project management
- Agile methods
- Customer experience
- Mobile app and website development

OUTLINE

- As part of the customer experience transformation program, it was necessary to build a tool to verify that actions taken at the subsidiary level were really deployed in dealerships. These actions are different for each country and based on customer experience

APPROACH

- Build specifications for the mobile app for Android and iOS, such as the online platform
- Bid solicitation management and supplier choice (developer) in line with customer ideas
- Supervise the mobile app and online platform development following an agile method with the supplier
- Management of feedback from 3 pilot countries testing the app progressively during app and online platform development for change integration in an agile way
- App and online platform tests before production launch
- Roll-out organization in more than 20 countries; partial deployment in France with trainings
- Build change requests for future app and online platform versions

RESULTS

- Mobile app (android and iOS) and online platform built and operational, deployed in more than 20 countries
- Version 2 of the app: accounting for countries' feedback and implementation
- Reporting of analyzed results used to conduct new initiatives for customer experience improvement

REFERENCES – PAGAMON

CUSTOMER EXPERIENCE

7 Automotive

Rebuild customer experience and deploy it worldwide

SKILLS

- Innovation
- Marketing/CRM
- Customer experience

OUTLINE

- Customers are more and more autonomous and demanding, customer experience becomes essential in the buying process
- The stakes are to reduce the product's role in commercial performance. This is a breakaway for an industrial player

APPROACH

- Assessment of the current experience delivered to the customer through qualitative and quantitative studies
- Rebuild of the customer experience starting from customers' needs and emotions, putting aside the internal constraints and silos
- Setting up of an action plan, meshing deep changes with quick wins
- Organization and monitoring the deployment of these drivers in different subsidiaries of the group with a customized approach
- Monitoring the correct implementation of this action plan

RESULTS

- Toolbox available for every country
- Deployment of action plans in more than 30 countries
- Results measure in NCBS, IACS and VoC surveys

REFERENCES – PAGAMON

ORGANIZATION

8 Automotive

Connected services' governance diagnosis

SKILLS

- Innovation and development
- Organization and governance
- Diagnosis
- Interviews

OUTLINE

- The rise of embedded software in the automotive industry requires significant and increasing investments in the development of connected services
- Uncertainties in the governance of connected services lead to significant delays in the development of ongoing projects: a diagnosis is launched to structure this activity

APPROACH

- Interviews of key players (~20): hardware, software and services development, purchasing, marketing, quality...
- Summary of recommendations according to 6 areas for improvement: technical and QCT management, functional architecture, software / system / vehicle development cycles, end-to-end (E2E) integration and validation, connectivity roadmap, project platforms
- Construction and documentation of an action plan to cover all areas

RESULTS

- Redefinition of the technical governance by architectural layers: generic (service platform), organic (by family), specific (by vehicle)
- Restructuring project teams according to agile principles: E2E development teams by service typology, component and transversal process chapters, E2E technical synthesis and vehicle project teams...
- Definition of key roles and sharing of responsibilities within project teams
- Streamlining the organization to improve workload, staffing and knowledge management within teams

REFERENCES – PAGAMON

ORGANIZATION

9 Automotive

Framing of a breakthrough innovation project for the Thermal Comfort Service

SKILLS

- Diagnostic
- Organization and animation of seminars
- Project management
- *Agile Scrum*

OUTLINE

- Automotive engineering faces recurring problems with the development of air conditioning systems
- There are adaptation difficulties when there is a change in customer expectations or system responses (e.g. specification changes) due to the lack of:
  - agility of organizations
  - road maps and tools that do not allow for anticipation and responsiveness
- The car manufacturer has launched a project where "pain points" have been identified
- It has been requested to provide follow-ups and support to establish a break in the development and tuning of the air conditioning system, and thus respond to external and internal challenges over the next 10 years
- The project must rely on Agile methods

APPROACH

- Diagnosis of the existing situation and identification of blocking points covering the 4 axes (4 individual interviews and 1 cross-functional workshop):
  - objectification of services,
  - inboard technologies,
  - offboard development tools,
  - Agile platform organization
- Training of Axis pilots in Agile and Backlog and awareness of work methods inspired by Scrum
- Identification of the situation targeted for 2025 and brainstorming on the means to achieve it (1 work seminar and 4 action plans)
- Support for teams in the framing and design of transformation roadmaps (3 sprints initiated and facilitated as Scrum Master)
- Establishment of the governance necessary for regular decision-making (conducted 4 management committees)

RESULTS

- Diagnosis of the existing situation and blocking points covering the 4 axes
- Situation targeted for 2025 validated by Management Committee
- Short and medium-term action plan for each Axis validated by Management Committee

SKILLS

- Strategy
- Product portfolio

REFERENCES – PAGAMON

STRATEGY

10 Automotive

Analysis of the potential of a technological products' offer for the after-sales market

OUTLINE

- The client is looking for new sources of growth in the after-sales market
- The stakes are to strengthen its presence and to win market share by improving market coverage of the current offer, while proposing an adapted offer to each target country

APPROACH

- Analysis of the potential sales per country for existing offers
- Detection of the sources of non-performance of existing offers
- Prioritizing new offers to be launched, as well as targeted countries
- Upgrade the sales and market data:
    - Clarification of information flows across actors
    - Action plan to solve inconsistencies affecting almost 20% of data

RESULTS

- Identification of the growth potential with regards to the market potential
- Setup of an attack strategy for mature products
- Setup of a road map for new products to be launched