

An aerial, high-angle photograph of a dense urban environment. The image shows a complex network of buildings, streets, and a prominent multi-level highway interchange with several lanes of traffic. The buildings vary in height and architectural style, with some featuring balconies and others having flat roofs. The overall color palette is dominated by greys, blues, and earthy tones, with some greenery visible in small patches. The perspective is looking down from a high vantage point, creating a sense of scale and complexity.

# Post-COVID-19 Customer Strategy Implications

# Introduction

**COVID-19 will change the way companies generate revenues, run their operations and interact with their customers and other key stakeholders in the future. Adapting to these differences is not only a challenge but also provides an opportunity for organizations to improve their market position as first mover advantage will become an even stronger factor after the crisis.**

## Seven major trends will drive business in the Post-COVID-19 world

**1. De-Globalization:** COVID-19 has shown the downsides of globalization, leading companies to rethink how they manage their supply chains, especially around purchasing and sourcing. This will probably result in shifts in production locations and customer focus.

**2. Remote interaction:** Customers and companies have had to learn how to work together remotely during the crisis. Due to this behavior and communications preferences may have changed for the long-term, impacting how individual departments and business functions will operate in the future.

**3. Flexibility:** Moving forward, companies will put a much greater value on flexibility to safeguard their margins in future challenging situations. This will impact areas such as process and function outsourcing, external staffing models and remote working.

**4. Digitalization and automation:** As a result of the crisis companies will try to reduce costs through greater efficiency, while gaining greater control, for example through investments in process automation, eCommerce, innovative software and IT.

**5. Market consolidation:** Weak players will be acquired by stronger competitors or go bankrupt and disappear.

**6. Price volatility:** As supply and demand change more rapidly than usual, many companies' cost and profitability structures, as well as customers' willingness-to-pay will vary, resulting in more frequent price increases and decreases.

**7. Focus on core competencies:** Competition in some industries could increase with companies suffering from financial losses shrinking certain operations and concentrating on high margin businesses in order to make them their core competence.

**The impact of these trends and drivers will vary by business and industry. Generally speaking, we believe that the longer the crisis lasts the higher the likelihood of these factors having an influence, with the full effects only visible in the mid or long-term.**

### Post-COVID-19 Strategy Guidance: one size does not fit all

PwC has identified multiple strategic post-COVID-19 levers that companies can use to regain business performance or even emerge stronger from the crisis. As part of this exercise we differentiated between B2B and B2C

companies – however, not all industries have been impacted equally by the crisis, meaning that the relevance of these levers will also differ by industry and business model.

Take a look at PwC's strategic lever evaluation matrix below, which provides industry and business specific guidance on customer interfaces.

# PwC's strategic lever evaluation matrix

			Customer Strategy			Sales and eCommerce					Service and Engagement				Pricing		
			Lever 1	Lever 2	Lever 3	Lever 4	Lever 5	Lever 6	Lever 7	Lever 8	Lever 9	Lever 10	Lever 11	Lever 12	Lever 13	Lever 14	Lever 15
	Retail	B2B	●	●	◐	●	◐	◐	◐	◐	◐	◐	◐	◐	●	●	◐
		B2C	●	●	◐	●	●	●	◐	◐	◐	◐	◐	◐	◐	◐	◐
	Consumer	B2B	●	●	◐	●	◐	●	◐	◐	◐	◐	◐	◐	●	●	◐
		B2C	●	●	◐	●	●	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐
	Chemicals and Materials	B2B	◐	◐	◐	◐	◐	●	◐	◐	◐	◐	◐	◐	●	●	◐
		B2C	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐
	Biopharma	B2B	◐	◐	◐	◐	●	●	◐	◐	◐	◐	◐	◐	◐	◐	◐
		B2C	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐
	Industrial Products	B2B	◐	◐	◐	◐	◐	◐	●	◐	◐	◐	◐	◐	●	●	◐
		B2C	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐
	Automotive	B2B	●	◐	◐	●	◐	●	◐	◐	●	●	◐	◐	◐	◐	◐
		B2C	●	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐
	Travel and Tourism	B2B	◐	◐	●	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐
		B2C	◐	◐	◐	◐	●	◐	◐	◐	◐	●	●	◐	◐	◐	◐
	Business Services <sup>1</sup>	B2B	◐	●	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	●	●	◐
		B2C	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐

## Levers

### Customer Strategy

1. Develop Customer Strategy and TOM Transition Plan for next crisis
2. Introduce Scenario-based Business Planning
3. Reactivate Customers and Calibrate Targeting

### Service and Engagement

9. Develop Omni-channel Service Strategy
10. Digitalize and Automate Service Processes
11. Rethink Physical Contact Centers and Working Environments
12. Challenge the Potential for Outsourcing Customer Service

### Sales and eCommerce

4. Develop Digital Sales Strategy
5. Design Digital Customer Experiences for Conversion
6. Digitalize and Automate Sales Processes
7. Re-organize for Value around Virtualized Customer Segmentation
8. Challenge the Potential for Outsourcing Sales Reps

### Pricing

13. Define Emergency Pricing Rules (Price Setting and Discounting)
14. Review Price Setting Frequency (Introducing Dynamic Pricing)
15. Digitalize and Automate Pricing Processes

● Extremely relevant  
 ◐ Very relevant  
 ◑ Relevant  
 ◒ Low relevance  
 ○ Not relevant

<sup>1</sup> Business Services exclude Financial Services, B2B = Business to Business, B2C = Business to Consumer.



## Top 5 out of 15 levers based on overall rating

Overall, the strategic lever evaluation matrix demonstrates that the top 5 levers – with the highest impact on success – are located in the Customer Strategy and Sales and eCommerce fields:

- 1 Develop Digital Sales Strategy
- 2 Develop Customer Strategy and TOM Transition Plan for next crisis
- 3 Design Digital Customer Experience
- 4 Digitalize and Automate Sales Processes
- 5 Introduce Scenario-based Business Planning

Looking more widely the 15 levers are:

### Customer Strategy

#### 1. Develop Customer Strategy and TOM Transition Plan for next crisis

History shows that pandemics occur with a certain frequency, meaning companies should prepare now for the next crisis. This requires a crisis specific customer strategy and a Target Operating Model (TOM) (e.g. Leadership, Organization, Process Excellence, etc.) transition plan that can be deployed effectively. Companies have to redefine their goals, values and strategic imperatives for crisis situations. Each TOM dimension requires a prepared transition plan to get the business into crisis operations mode.

#### 2. Introduce Scenario-based Business Planning

In the future the ability to better anticipate potential risks and opportunities will be key. Companies need to develop a methodology, install a process and define responsibilities within the organization through a scenario-based business planning approach. Navigating through challenging situations will become less problematic when companies

have improved transparency and proactive planning of actions. Ultimately, companies can then react much faster and have a better sense of the consequences of their actions.

#### 3. Reactivate Customers and Calibrate Targeting

The crisis changed market dynamics and customer purchasing behavior. Companies therefore need to carry out new analysis to enable customer reactivation and calibrated targeting of activities. New customers may have appeared, while others have disappeared. Some customer groups might have adopted new sales and service channels, ultimately resulting in changes in the attractiveness of particular customer segments. If players can identify the need for strategic readjustment and the right timescale for taking action, they can potentially increase market share (such as through improved customer centricity) and improve profitability (via tactics such as data-driven marketing, digital sales, and digital service/product delivery).

## Sales and eCommerce

### 4. Develop Digital Sales Strategy

Digital sales, especially eCommerce or mobile commerce, have proved crisis resistant, remaining stable or increasing. Additionally, companies with an integrated multi-channel sales approach were able to react more flexibly to the challenges created by the virus – for example sales volumes could be shifted dynamically to digital sales channels. As the crisis progressed these companies were able to fulfill customer interaction demands in faster, better ways, detect and utilize price effects and lock in high margins, grow sales revenue and acquire new customers. The development of a 360 degree sales strategy is now highly recommended. This should adjust operating models to cover digital sales, as well as customer service integration, customer engagement and optimize sales touchpoints and Point of Sale (PoS), enabling more dynamic pricing. A scenario-oriented digital sales strategy will generate instant and potentially high ROI if companies need to revert to crisis mode in the future.

### 5. Design Digital Customer Experiences for Conversion

The shift in customer experience (CX) from physical to digital will be key, both in the crisis and beyond. If digital and virtual become the “new normal”, then CX will become the central driver for conversions. CX is multi-dimensional, containing elements of customer relationship management (CRM) service (SX) and usability experience (UX). This makes it challenging to digitally reproduce and/or transform these elements. This is most notable in a crisis. While providing human customer communication and engagement will be a key success factor while everybody is in crisis mode, companies should evaluate how to design for a true digital CX, transforming the most used touchpoints into “experience touchpoints” ready to be deployed and operationalized. The crisis will lead to a requirement to adjust personas and carry out new needs-analysis, while customer journey stressing and mood-mapping can also be used to support the design and transformation process.

### 6. Digitalize and Automate Sales Processes

The future goal is to become more independent from physical PoS-interaction. At the same time digitally enabled sales activities should become more personalized and focused on human engagement. Hyperlocal sales activities that reflect local needs through digital and automated sales channels will be key to reaching and engaging with customers in the crisis and beyond. Companies should therefore secure their customer base and relationships through automated and branded sales campaigns with crisis-relevant context. In order to become more resilient, analyze existing marcoms and sales processes and define

potential end-to-end (E2E) optimizations. Analyze how to automate lead generation and lead nudging and how to increase conversion rates with data-driven marketing utilizing DMPs and marketing AI solutions such as Salesforce Marketing/Sales Cloud or Adobe CXM. Define and evaluate how to automate customer acquisition, Configure, Price, Quote (CPQ), availability checking, order entry, and invoicing. Analyze how to support the sales force and field force with mobile solutions. Understand whether a central point of interaction such as a customer portal can support the integration of physical PoS, sales force activities and EDI for larger customers. Make use of third-party marketplaces and digital sales platforms. However, doing all of this, companies take into account risks as brand dilution and changing market positioning. Define rules to turn today’s high-maintenance, manual workflows and Delegation of Authority (DoA)-processes, such as approvals and order amendments into low-touch and low-effort ones. Try to increase the amount of straight-through-processing through (technical) ERP or SCM integration. Evaluate and calculate the impact of each of these on your operating model and then prioritize and select measures which are valid beyond the crisis.

### 7. Re-organize for Value around Virtualized Customer Segmentation

Increase the speed of allocating the highest-value resources to the highest-value customers. Continue segmenting customers according to their potential, clearly allocating higher-potentials to key account managers and sales reps and lower-potentials to telesales and self-service portals and eCommerce. Support field sales with inside sales for processes such as CRM, data maintenance, offer creation, pre-calculation and inquiry resolution, while largely automating most tasks. Focus field sales on relationship building and customer consulting. Consider concentrating remaining inside sales tasks in a shared service center which has appropriate language skills.

### 8. Challenge the Potential for Outsourcing Sales Reps

While virtualizing and automating many customer interactions and transactions, consider reducing personnel costs by only retaining outstanding performers on staff. Outsource core performers in field sales so that they become independent sales agents, commission-based reps, or freelancers. Look at Business Processing Outsourcing (BPO) to outsource shared services such as inside sales or service. Ensure that the business can utilize these services as and when required, enabling it to respond to new waves of the pandemic quickly and flexibly.



## Service and Engagement

### 9. Develop Omni-channel Service Strategy

The crisis should be a catalyst for change in the area of service. Essentially, before companies rush to make new investments or adapt existing structures, they should first define a new service strategy. In addition to first assessing customer expectations along the entire customer journey, the contribution of individual parts of the journey to profitability must be taken into account when defining new service ambitions. It is crucial to reflect which customer segments are to be served at which quality levels and cost. Today's technology offers greater potential for new, value-based service differentiation, with a focus on using automation for low and medium value activities. Additionally, it will be crucial for companies to network their channel and process offerings and implement an integrated strategy and omni-channel experience. This is the only way that companies can balance cost-optimization and quality when delivering the optimal customer experience.

### 10. Digitalize and Automate Service Processes

Service queries from customers are constantly rising while the volume of customer enquiries is increasing considerably across the globe. As part of the general shift to digital during the pandemic the following elements should be part of new digital service processes for the future:

- Integration of new technologies, especially artificial intelligence (AI), robotics such as chatbots and robotic process automation (RPA), voice and speech recognition (natural language processing, or NLP), biometrics and messaging
- Increasing availability/use of digital channels such as mobile apps, chat, messaging services and self-service systems for customers to make contact
- Ensuring operations align with service-centric business models and the use of digital services, for example in eCommerce, e-travel, online food delivery, e-ticketing and connected mobility (such as electric mobility, connected cars, car sharing)

### 11. Rethink Physical Contact Centers and Working Environments

The crisis demonstrated that the majority of professional customer service center providers were unprepared for remote working. The inability to enable home workplaces with the right infrastructure led to bottlenecks in how customers were able to access companies and their service providers. Due to increasing digitalization and the availability of new solutions, the need for physical service center capacity can be reduced on average by 30-40% until the end of 2021. Applying new standards for quality and performance management along with real-time direction and monitoring, supported by new incentive parameters will lead to multiple benefits for companies. These include lower real estate costs and access to more qualified and regional employees. Flexible home office concepts will therefore become part of every company's mid- and long-term sourcing and production strategies.

### 12. Challenge the Potential for Outsourcing Customer Service

The availability of solid, attractive IT solutions coupled with massive demand to reduce service costs is currently leading to new opportunities in Germany when it comes to customer service. Companies must therefore work with shareholders, functional departments and workers councils to revise their sourcing strategies. Customers today put a great importance on high-level First Contact Resolution rates and access to experienced service agents to solve complex issues. The first of these needs can be met in a better, more cost-optimized way by using professional outsourcing service providers with established structures (including in near- and offshore locations). Additionally, successful outsourcing providers integrate new technologies into their solutions in order to support the long-term digital transformation of service processes. Innovative incentive concepts (such as gain-share models) promote the entrepreneurial and sustainable development of profitable outsourcing models.



## Pricing

### 13. Define Emergency Pricing Rules (Price Setting and Discounting)

Review the potential impact of the crisis on your current sales, pipeline perspective and clients. Depending on their type of business your customers might be faced with severe challenges. While they require your support they also pose a threat to your bottom-line – if they have no cashflow, they won't be able to pay bills and will cancel planned orders. That means switching to upfront payments and extending payment terms can both be feasible measures depending on your business, risk and client profile. A key point – ensure that any discounts are only for a limited time or are bound to single orders, in order not to damage long-term profitability.

Similarly, other business rules should be reviewed and potentially adjusted, such as: minimum order quantities, order changes, frozen zones, and delivery options.

### 14. Review Price Setting Frequency (Introducing Dynamic Pricing)

The frequency of price changes varies between different industries, ranging from annually, quarterly and seasonally to monthly, weekly, daily or even hourly. As some factors impacting price might change from being relatively stable to being highly volatile during the crisis, companies should review the regularity of price changes, especially those around longer timeframes. They should switch to more a frequent review cycle to account for changing market

demands. Companies who have already invested in transparent price management systems can now make use of the features in these solutions and execute emergency guidelines quickly.

### 15. Digitalize and Automate Pricing Processes

A lot of businesses currently wish they had transparent data and views across their supply chains and market perspectives (such as their sales pipeline). This would allow them to react quickly to previously unforeseen challenges and changes, across both supply and demand, allowing them to rapidly execute price changes to ensure business targets are met.

However, implementing fully fledged pricing software solutions can be a long and complex endeavor. In the short term, many manual processes can be automated relatively easily using simple bots: Capture the prices offered by rivals with price crawlers, directly match competitive prices by comparing with internal data, and apply rules-based offer reviews to ensure compliance and escalation processes.

**As all of these insights can appear theoretical we have selected two examples (Automotive B2B and Travel and Tourism B2C) to provide a more practical look at how they apply in each industry.**

# Deep Dive Analysis: Automotive B2B

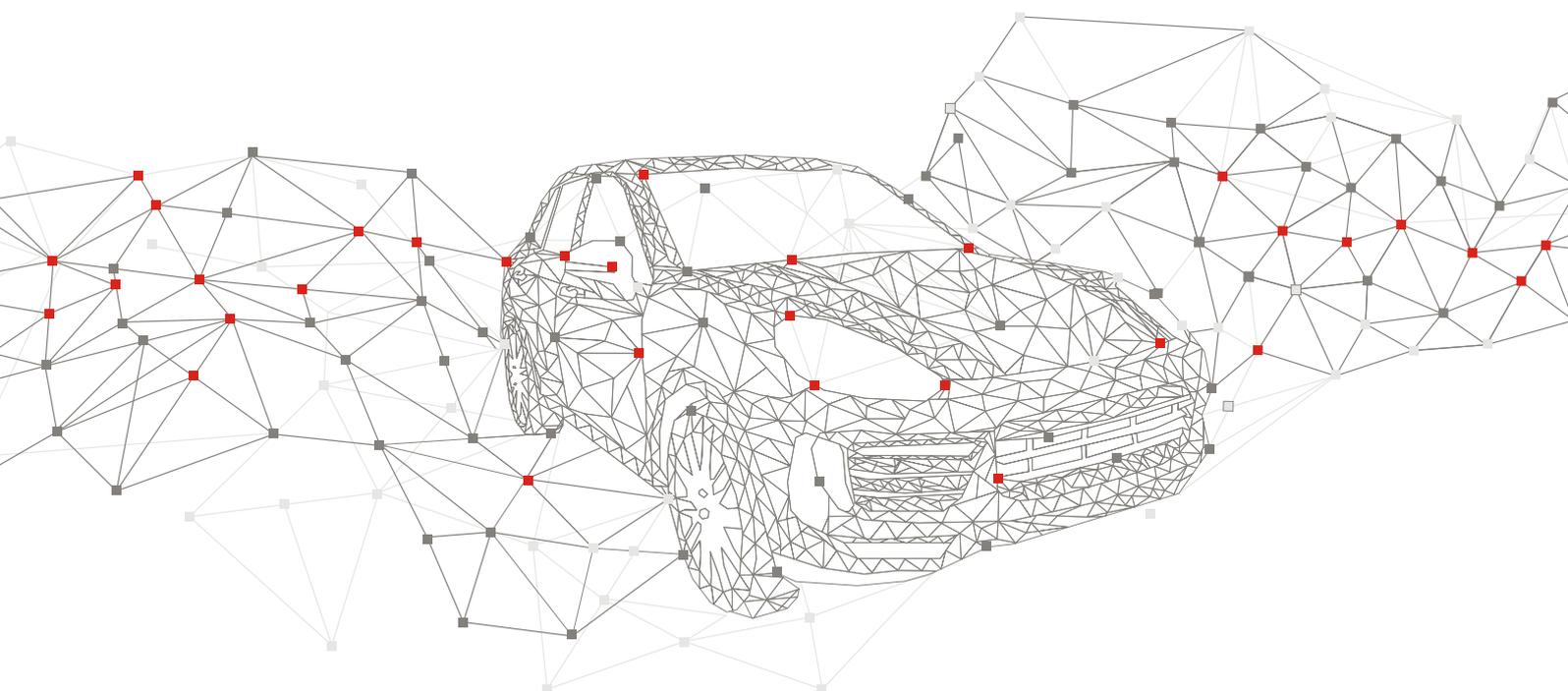
The automotive industry consists of OEMs and Tier 1–3 Suppliers. These include special service providers focusing on mobility services, charging services (EV) and full BPOs providing new platform services for autonomous driving (Level 1–3). While the pandemic has shown that industries such as automotive which are highly integrated

on a global basis are very vulnerable to supply chain disruptions, the sector faces a triple challenge. Companies need to master structural transformation while fixing broken supply chains and reacting to customer buying behavior that has entirely changed.

## Top 3 Post-COVID-19 Drivers – Automotive B2B

Driver	Impact	Evaluation Ratio
De-Globalization		Fully integrated supply chains on a global basis are very vulnerable to pandemics, especially when sensitive Tier 1 (technology) suppliers are located away from production sites and can't be replaced locally (e.g. China-EU). OEMs therefore need to rethink their sourcing strategies, especially with regard to local emergency replacements and immediate platform adjustments. Alternative sourcing, using interactive OEM-operated multisided marketplaces and auction platforms will become key, especially around core electronic components for Machine-to-Machine (M2M) communications and security.
Remote Interaction		Remote and virtual sales through own- and third-party dealers will become a strategic success factor when physical dealer locations are closed due to lockdown regulations. Those OEMs with digital dealer operations who are able to inform, interact and transact with customers remotely through digital Point-of-Sale and -Information will benefit when their competitors are forced to close during lockdowns.
Flexibility		Flexible and innovative customer fulfillment and delivery processes will be a strategic advantage. More flexibility will be delivered through digital technologies: virtual car key assignments, remote dealer or repair assistance and fleet management, automated push notifications on delivery or maintenance status and OEM operated repair and/or technical platforms with local recruitment.

 Extremely relevant  
  Very relevant  
  Relevant  
  Low relevance  
  Not relevant





## Top 5 Post-COVID-19 Strategic Levers – Automotive B2B

Strategic Lever	Relevance	Description
Develop Customer Strategy and TOM Transition Plan	●	Lessons learned from COVID-19 to be incorporated into a new customer strategy and TOM plan to ensure effectiveness during the next crisis. This plan should include a crisis product/service portfolio, crisis customer prioritization, crisis staffing/shift plans, crisis health measures, crisis monitoring system and corresponding governance structure (including decision-making rights).
Develop Digital Sales Strategy	●	OEM, Tier 1–3 supplier and dealer sales (such as to rental companies) still rely on account managers and decision making by individuals. CRM data can now be leveraged to support cross and upselling. A digital sales strategy has the potential to increase customer reach and limit crisis losses.
Develop Omni-channel Service Strategy	●	During the crisis, customers have further adopted new communication channels, for example self-service portals, chatbots and mobile interfaces. These are cost efficient, can improve service quality and are stable in times of crisis.
Digitalize and Automate Sales/Service Processes	●	The implementation of a digital sales and omni-channel service strategy requires the digitalization and automation of sales and service processes. This lever has the potential to decrease costs and improve process reliability/quality which is again vital during a crisis.
Remote Work: Rethink Physical Contact Centers and Working Environments	◐	An effective supply chain and workforce is key, especially in the area of mobility services. The COVID-19 crisis has shown the importance of flexibility in working models. Remote working should be enabled by technology and training.

● Extremely relevant   
 ◐ Very relevant   
 ◑ Relevant   
 ◒ Low relevance   
 ○ Not relevant

# Deep Dive Analysis: Travel and Tourism

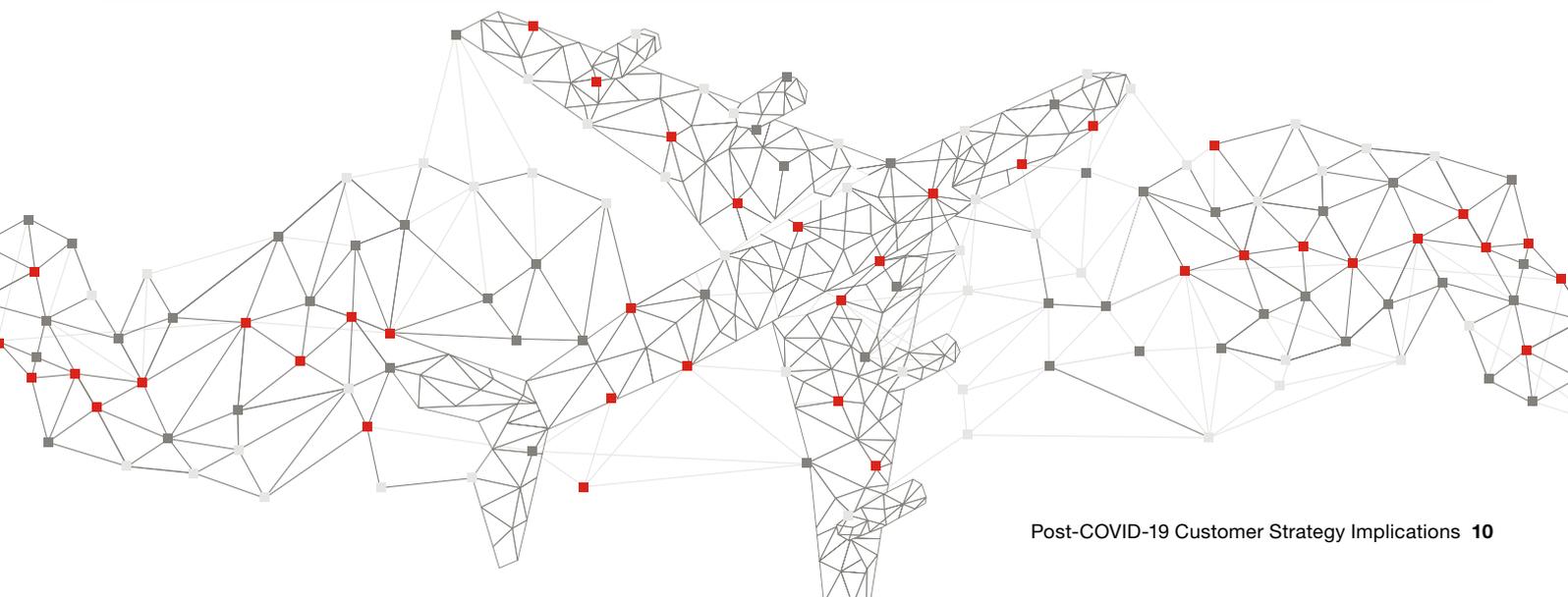
The Travel and Tourism sector includes all companies providing services within the value chain for both leisure and business travel (short- and long-distance). These include integrated tour operators and travel agencies, passenger mobility providers (such as airlines, rail companies and public transport), and local hospitality/hotels.

All aforementioned industry subsegments have been hit dramatically by the COVID-19 crisis. There's a high likelihood that customers changed their behavior permanently, leading to a smaller total market.

## Top 3 Post-COVID-19 Drivers – Travel and Tourism

Driver	Impact	Evaluation Ratio
Remote Interaction	●	When fast communications and actions are vital, direct contact with customers is more important than ever. The availability of customer contact data has therefore been critical for companies such as airlines and tour operators to communicate with passengers during flight disruptions. However, effective irregular operation (IROPS) management also requires capabilities (in terms of processes, tools) and a service concept that enables disruption to be handled remotely. In the future, effective IROPS management will become even more important as a value driver to regain trust and loyalty – both for passengers and operators.
Digitalization and Automation	●	The challenge in digitizing and automating business processes lies in maintaining flexibility when required, but also fostering workflow automation where possible. For the handling of passenger claims, for instance, well-defined scenario planning enables a significant reduction in the amount of manual labor required and allows cost savings, such as through self-service. At the same time, the ability to handle non-standard scenarios (for example a missed connection claim) will determine the degree of automation. Achieving this balance in an optimal way will be one a future priority for service operations.
Market Consolidation	◐	In times of significant margin pressure and overcapacity in the market, the COVID-19 pandemic has dramatically aggravated the situation for airlines and tour operators. Flybe, Virgin Australia, and Trans States Airlines are just some of the carriers that have not survived the crisis, with many others struggling to cope with their fleets grounded. This all means that the market will experience further carrier consolidation, combined with a reduction in fleet capacity and destinations offered. A solid business model and profitable operations will be a decisive factor in remaining competitive, especially for leisure airlines/tour operators,.

● Extremely relevant  
 ◐ Very relevant  
 ◑ Relevant  
 ◒ Low relevance  
 ○ Not relevant



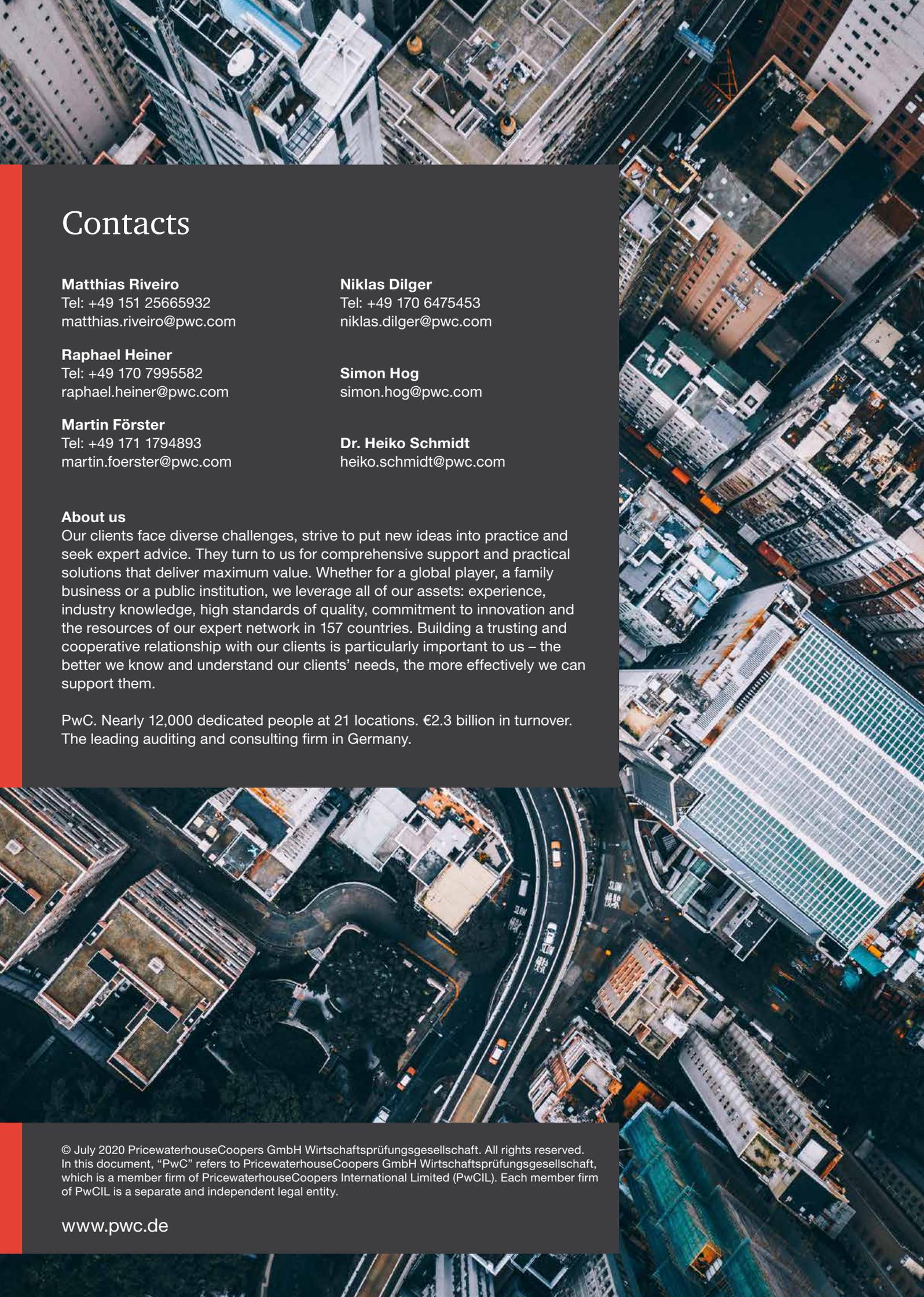
## Top 5 Post-COVID-19 Strategic Levers – Travel and Tourism

Strategic Lever	Relevance	Description
Reactivate Customers and Calibrate Targeting		The pandemic has not only caused leisure travel to slump but also led to significant declines in business travel. The World Tourism Organization (UNWTO) expects the number of international travelers to fall to the same level as in 2013 – only one billion people will travel, down from 1.4 billion last year. Whereas leisure travel is expected to catch up, changing travel policies, remote meetings, and cost pressures will cause a mid-term decrease of between 10–20% in business travel, especially in continental traffic. Travel companies must therefore look at how they reactivate their customers and how they adapt their offerings/targeting given this structural demand change.
Challenge the Potential for Outsourcing Customer Service		In the premium segment, especially business travel, a high standard of customer service often comes along with substantial overheads. Premium customers value greater customer service and are willing to pay for it, while it has a big impact on their loyalty. However, due to COVID-19, travel service providers are facing the need to make greater cost savings than before. By challenging the level of integration of customer service operations, such as contact centers, companies can drive down costs by up to 15%. To transform fixed into variable costs while maintaining service excellence will be an effective profitability lever for the industry.
Design Digital Customer Experiences for Conversion		With the rise of quality-oriented and sustainable tourism, a digital customer experience along the passenger journey is becoming increasingly relevant. COVID-19 is going to spur this move away from mass tourism, leading to digital enablement of travelers to organize and experience their individual holidays. At the same time, a convergence of transport modes towards an integrated world of (smart) mobility will support the autonomy of the digital traveler even further.
Digitalize and Automate Service Processes		Along with delivering cost savings by outsourcing customer service operations, new services can foster process digitalization and automation. Services, such as chatbots, voice-text solutions and virtual assistants are already in use today, especially in the B2C world. In the future, 70–80% of all customer enquiries in the travel sector will be answered automatically. In addition, the interaction between different providers (hotels, airlines, rental car providers, etc.) and the rising purchasing power of the millennial generation (today 50% of travelers) will make integrated and digital solutions increasingly relevant.
Define Emergency Pricing Rules		Dynamic pricing has been established in most parts of the travel industry for a long time already, especially in aviation. The decoupling from rigid booking classes towards a dynamic packaging of products and ancillary services has advanced margin management. Nevertheless, for exceptional situations with drastic drops in demand such as now, hardly any reference values are yet available. Airlines as well as rail operators and other mobility service providers face the challenge of reacting effectively to similar, exogenous shocks in the future and then setting price points that make optimum use of their reduced capacity.

 Extremely relevant  
  Very relevant  
  Relevant  
  Low relevance  
  Not relevant

## Conclusion

Currently, COVID-19 is a major challenge and threat for most companies. Nobody can foresee how long the crisis will last and the immediate need is to secure operations and liquidity. Consumer behavior and preferences are still uncertain. Do customers plan to catch up with their consumption? How important are savings to them now? However, companies need to look beyond the crisis and should not underestimate new trends and changed market dynamics. Preparation and timing is key and requires thorough analysis and advance planning. To achieve this, PwC supports companies from strategy to execution leveraging its global network and extensive data sources.



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PwC. Nearly 12,000 dedicated people at 21 locations. €2.3 billion in turnover. The leading auditing and consulting firm in Germany.

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