

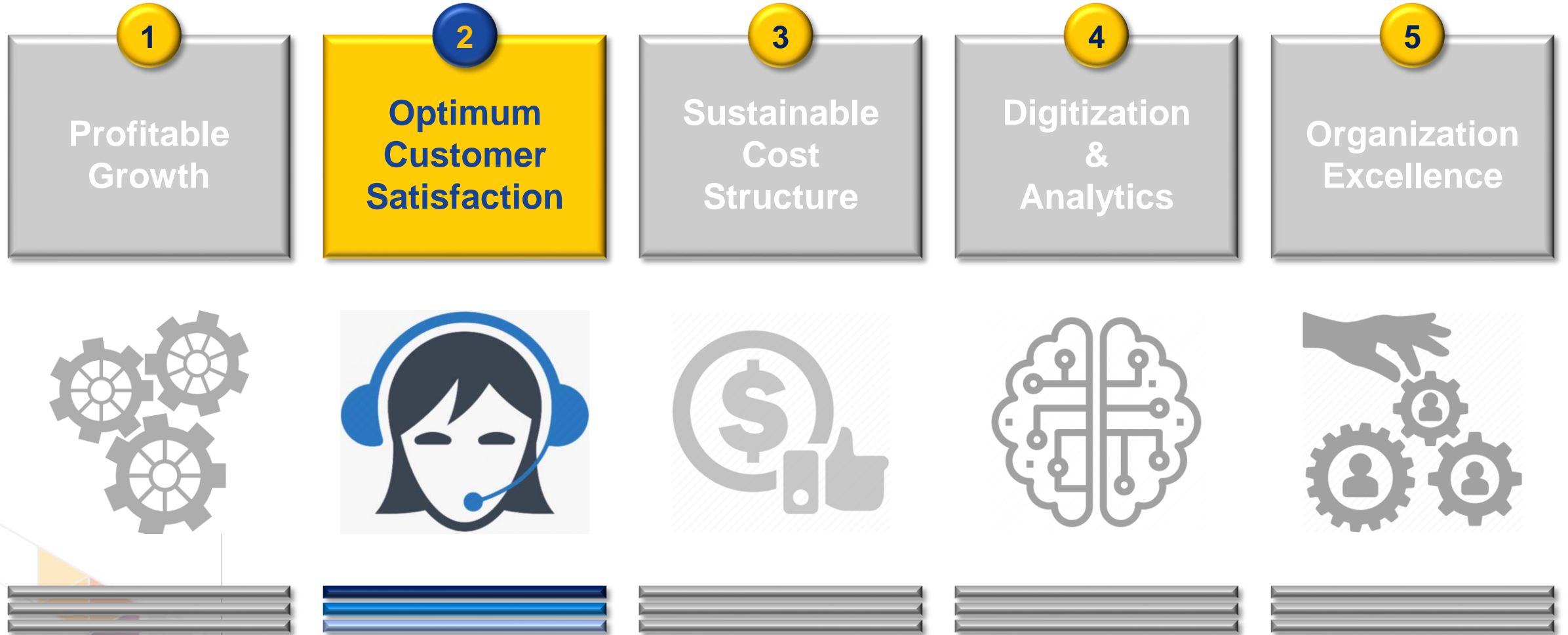
Remaining Customer-driven in the context of Operational Excellence

...and delivering *Optimum Customer Satisfaction*

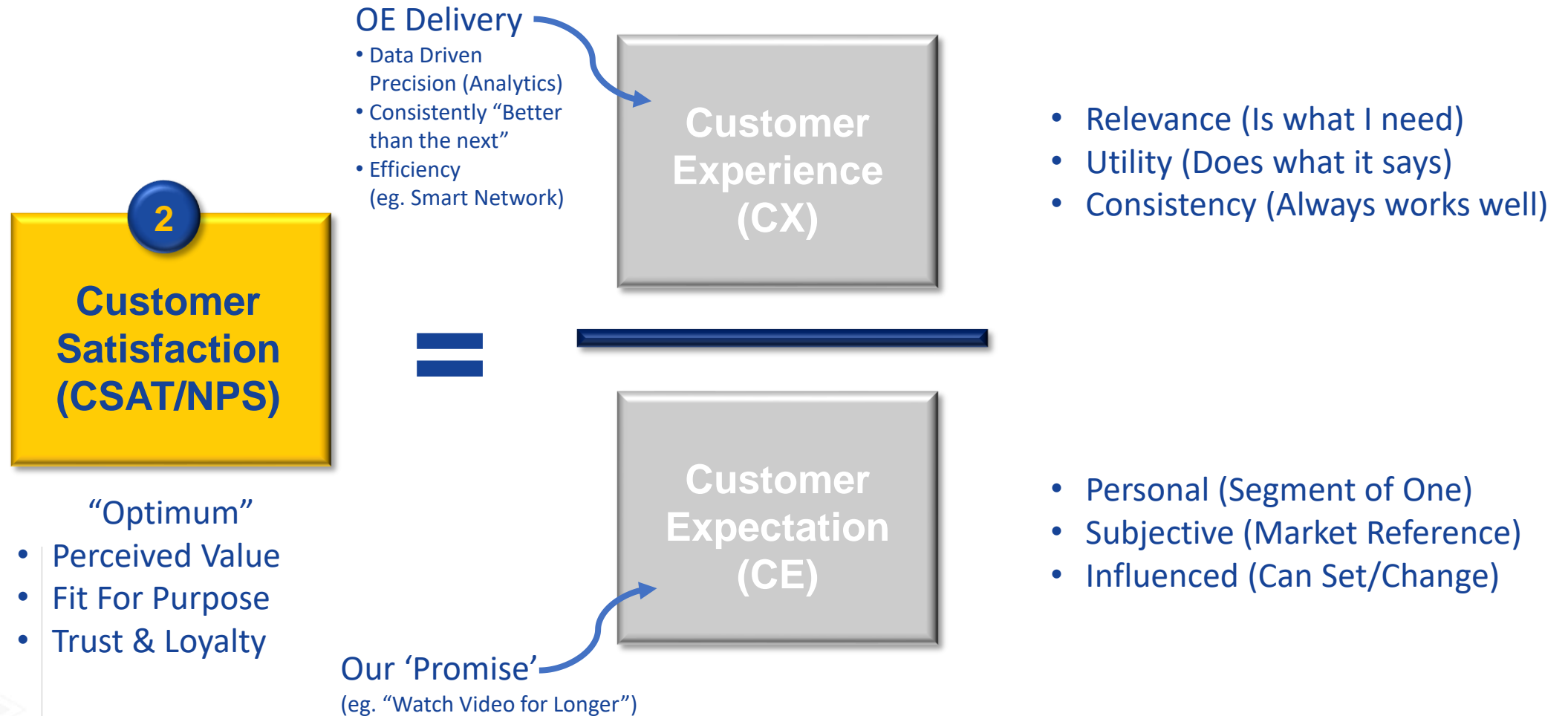
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2 December 2019



Operational Excellence retains the Customer at the Core of our Mission: *To be the Lowest Cost Producer Relative to our Customer Promise*



Customer Satisfaction is not a result of 'brute force' investment but a function of two important factors we can influence: *Expectation & Experience*



Our own Data analysis reveals what consumers value from us, and its' implications to our chosen OE Strategy...

What consumers want

Implications to Telcos

Guiding Principles

#1

Best Perceived Value for Money



Operational Excellence is now “table-stakes” in telecom (and other commoditized / disrupted industries) – lowest unit cost enabling ‘value offers’

Operational Excellence sets the boundaries for OpCo strategies & priorities; eg. enables **low headline pricing + add-ons**

#2

Innovative Brand = “Premium”



Brands perceived as Innovative are preferred by consumer, when all else (product & price) are equal – **OE frees cash & data focus for innovation**

Being the lowest cost operator does not mean being the least customer centric or innovative (eg. Low cost airline case)

#3

Products / services that suit my lifestyle



Remaining customer-driven in context of OE is about delivering a **“just nice” experience** with the **products** that customers value in our **target segments**

SofO analytics is essential to know the Customer Expectation, and make informed decisions by applying unit economics mindset

#4

Consistency of service



OE is about executing a chosen strategy not just with optimal efficiency, but achieving **maximum consistency** (eg. **data throughput, customer service**)

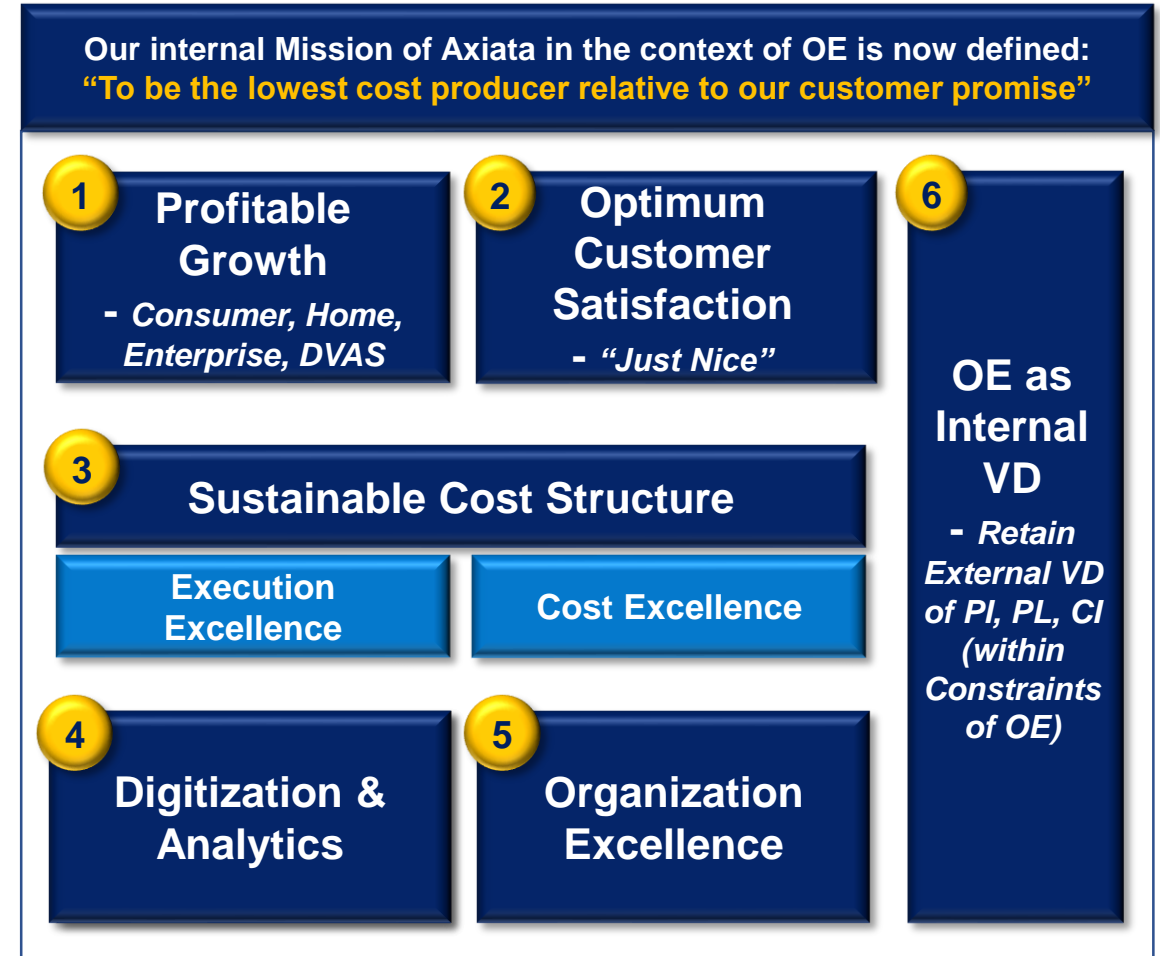
Delivering consistently good experiences creates more value, trust & loyalty than inconsistent “best” experiences

Given our deep understanding of our Customer's needs, our approach to OE remains consistent with delivering on their expectations...

What our Consumers want

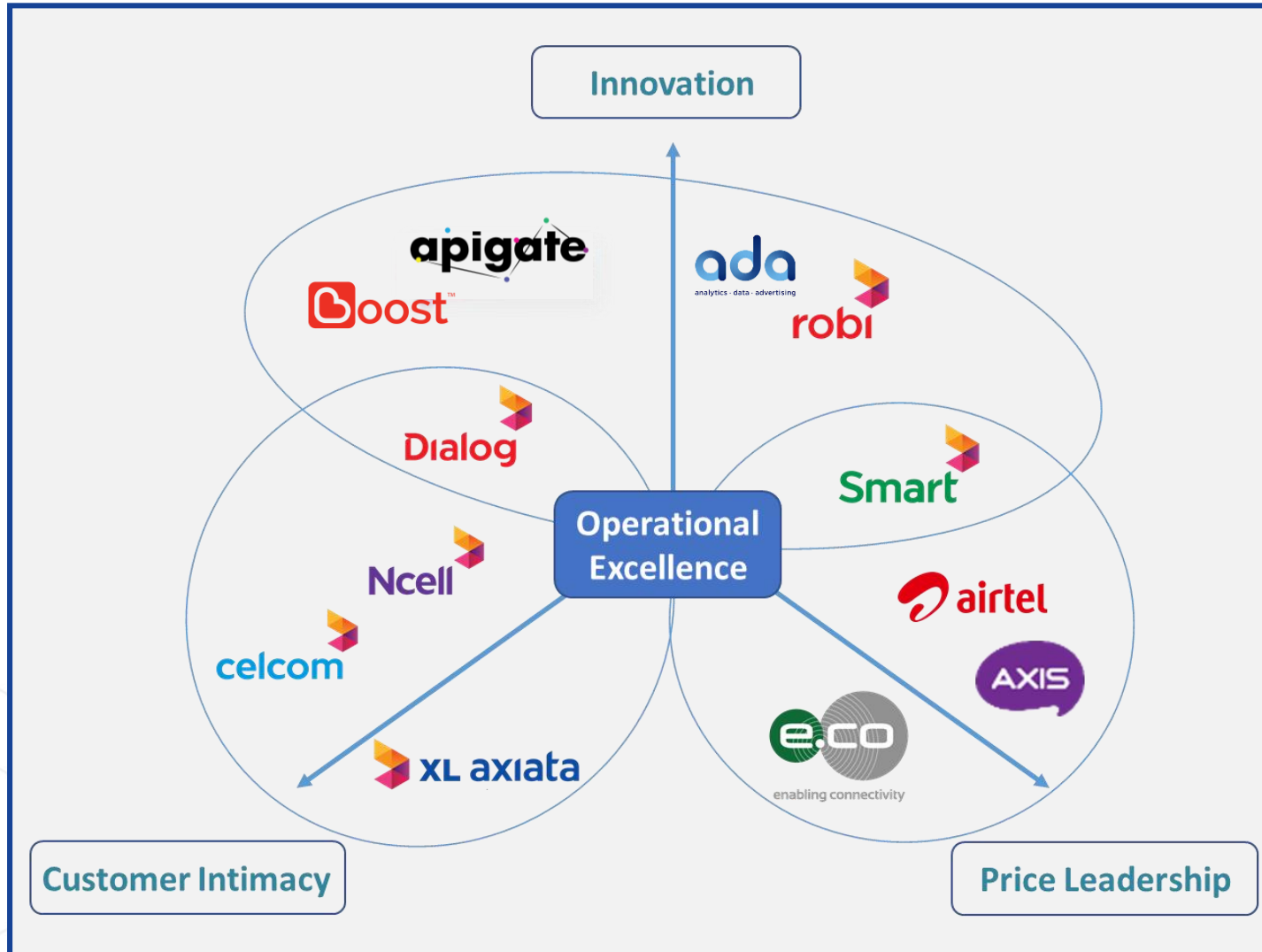


What OE means in Axiata



■ Price Leadership
 ■ Product Innovation
 ■ Customer Intimacy

...hence Operational Excellence is now the primary value discipline for all OpCos... simultaneously supporting and setting parameters of the chosen external Value Discipline...



Implication to OpCos

Profit and cash-driven strategy, leading to the capacity for 5G/IoT-era investments and/or a higher yield Investor Proposition

Operational Excellence as our Common Internal Value Discipline, which is the constraining factor for any external Value Discipline chosen by OpCos

OpCos' entire operating model – company's culture, business processes, management systems, and computer platforms – **to serve Operational Excellence baseline**

OpCos' current Value Discipline remains for external positioning with Consumers (TOM), and to supplement Operational Excellence (e.g. Innovation in digital interactions – *high tech/high-touch* – to enable OE)

Selective investment on projects that deliver maximum ROI, and potentially defer some long term initiatives, due to near term profit & cash focus

Thank You

