



# **State of e-Commerce during COVID-19 in Poland.**

**Digital Executives Report.**

**digital**experts

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**We believe all of us should maintain solidarity, especially nowadays. It concerns knowledge exchange as well, since it constitutes an important factor of common economic success.**

## Introduction

**Uncertainty is a term that can define these days. Uncertainty not only towards what will happen but also the uncertainty of the status here and now. The accepted strategies and selected directions are no longer prevailing. One thing is certain: the reality that we are going to face will be the New Normal.**

We believe all of us should maintain solidarity, especially nowadays. It concerns knowledge exchange as well, since it constitutes an important factor of common economic success. Over a year ago we created Digital Experts Club – an unique place where we can exchange knowledge and discuss current market state in the group of more than 90 highly experienced Digital Executives from Poland. Being aware that currently everyone is looking for solutions and the reference point, we decided to share our reflections, hoping that they will bring about an added value to your business.

If you are not from Poland we hope to inspire you. If you are Polish we hope to bring you added value into your reflections, confirm your already made decisions, challenge your point of view or at least make you feel that you are not alone at this battlefield.



**Tomasz Lis**

Founder Digital Experts Club



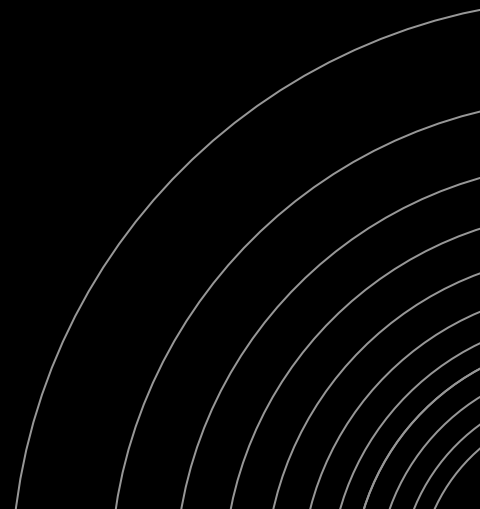
**Mikołaj Zygmanski**

Founder Digital Experts Club

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**Because knowledge  
exchange matters.**

**digital**experts



# Executive Summary

We made conversations with almost 100 Digital Experts Club's Executives about COVID-19 impact on Digital Business they work in. One thing is sure – the pandemic created the New Era. **Digital Business Era. Digital became the strategic channel in over 60% of studied business.**

This new reality created a lot of opportunities but at the same time a lot of threats and new challenges companies need to face. From the organisation global view: broken supply chain and financial liquidity – both needed as a fuel for e-Commerce. From the perspective of operations in Digital departments: logistics and customer service. What is interesting is that these challenges touch almost every business: both growing and down-performing.

What we have found is the massive polarization among companies in e-Commerce sales during COVID-19. **49% of the brands are staying strong and making YoY growth in sales. At the same time 43% noticed YoY declines.** One KPI is common: gross margin which stays flat in 48% of business and goes down among 41%. So here comes the first question – did online take the sales of the offline business? If not – why?

These days, even if they succeed in sales, Digital Executives are afraid of what will come tomorrow. It is an attitude that has never been seen before – one of constant thinking on how to actively manage tomorrow's crisis. And at the same time they need to be afraid of what will come next, to prepare a strategy for the upcoming weeks. **The majority of experts believe that the e-Commerce market will continue to decline**

**in upcoming months.** So what strategy should we build for these tough times and which one will help businesses to win? Or maybe which one will help to survive?

You can see the answer in the direction of cost strategy that Digital experts decided to follow. **There is no doubt in Digital Executives decisions, that we should continue to invest in Digital Business.** We asked them about 14 Digital areas and their investment plans. 9 of 14 areas (performance marketing, technology, UX, logistics, etc.) stay strong or are going to grow. Badge “space for savings” got 5 areas – only brand marketing activities, mostly correlated with offline business and overall brand building.

The last part of our study was focused on challenges in the area of managing the crisis in terms of soft skills and strong crisis-team. There you can find another common pattern among businesses despite different sales results: **80% of executives plan to keep their Digital teams or make it even bigger.** The difference between the past and New Normal is the set of new skills that leaders are looking for. Crucial for managing the Digital in the times of uncertainty became: willingness to change, agility, and data-orientation.

Despite the time and the place we are now in as business, and despite all difficulties that we need to challenge, we must be aware: now is the time for change. Now, we are creating the winners of the future.

# Short Executive Summary

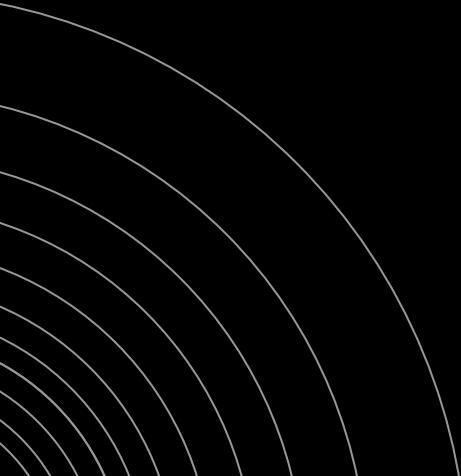
Despite the time and the place we are now in as business, and despite all difficulties that we need to challenge, we must be aware: now is the time for change. Now, we are creating the winners of the future.

- 🎯 Digital became the strategic channel in over 60% of studied business.
- 🎯 The biggest challenges from the organisation global view became: broken supply chain and financial liquidity. From the perspective of Digital operations: logistics and customer service.
- 🎯 49% of the brands are making YoY growth in sales. 43% noticed YoY declines.
- 🎯 Gross margin stays flat in 48% of business, goes down among 41%.
- 🎯 54% Digital Executives forecast decline in sales in upcoming months.
- 🎯 80% of Executives plan to keep their Digital teams.
- 🎯 Managers will continue to invest in Digital areas including technology, digital marketing, UX and logistics.
- 🎯 Brand marketing investment will drop in upcoming months.
- 🎯 Top 5 activities taken by Digital Executives in time of COVID-19: increased online marketing activity (43%), logistics re-organisation (32%), cost reduction (31%), marketing plan revision (28%), price reduction (26%).
- 🎯 77% Managers say: role of the Offline channel will change after COVID-19.

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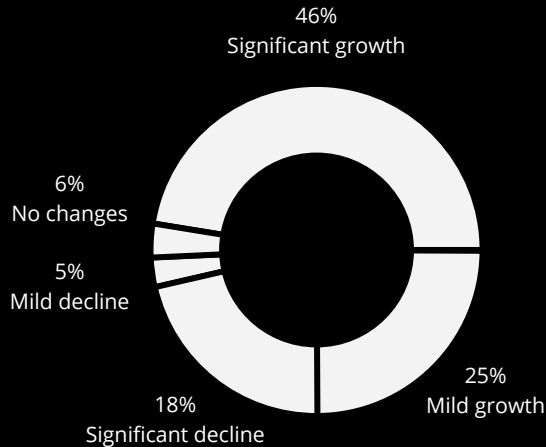
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● **The growing role  
of e-commerce  
during COVID-19**

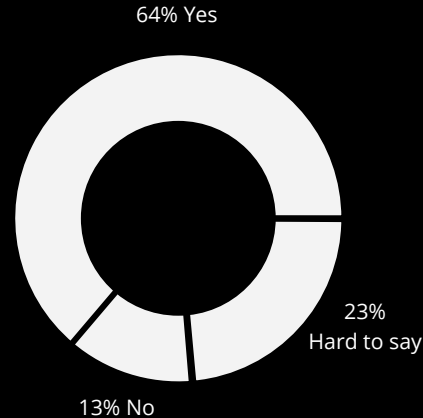


# The growing role of e-commerce during COVID-19

How does the role and the e-commerce significance is changing in your organization at the times of COVID-19 crisis?



In connection with the crisis, has the area of e-commerce gained a strategic position in your business?



It has been only 2 weeks of crisis and it was enough to make 60% of the surveyed companies find e-Commerce to be a strategic area in their organization.

In the times of closed stores and drastic decline of the revenue in the offline channel, e-Commerce is becoming the main, and repeatedly the only channel of sales, that a business commands today.

Still there is some part of companies left that do not treat the Digital channel in a strategic way. Some of them certainly have not seen that chance yet, others are not capable of exploiting the potential of e-Commerce in the times of crisis (e.g. travel industry) or the range of e-Commerce sales is so insignificant that the strategic action is to solve the problems of offline business.



# The growing role of e-commerce during COVID-19

Name 3 other areas of your organization that received strategic meaning in connection with the COVID-19 situation.

Logistics	57%
Supply Chain	37%
Marketing and communication	37%
HR	34%
Technology	33%
Customer Service	33%
Finances	25%
Production	20%
Work safety regulations	12%
Operations	12%

The most common areas that next to e-Commerce stood in the centre of attention of brands became logistics and supply chain management. Dynamic change in the demand of particular product categories have taken their toll in the logistic sections.

Strong growth, e.g. in grocery business caused sudden demand for people and products. In turn, strong declines in other businesses and total limitation of offline stores forced other businesses to the reduction and reorganization of warehouse teams for the time of decreased amount of work.

Apart from logistics, a remarkable increase of its role in the organization was noted by marketing – especially Digital marketing, that fulfills the function of sales for the strategic e-commerce channel and also one of communication / PR for customers in the context of security state and the situation

in which the company operates. Beyond the podium, but still treated as strategic areas are the following:

HR and soft employee management – in the face of the crisis, companies must deal with the tasks connected with the remote management of the employee: organization of work, motivating, accounting, managing the crisis communication within the organization etc.

Along with the strengthened position of e-Commerce **companies perceive technologies as a vital factor that has a direct impact on the capacity to adapt to the quickly changing environment.**

Customer Service - fulfilled via the whole range of hotline, chats, video chats, e-mails, etc., that needs to manage it in the time of courier problems, delayed shipments, shops out of service or phone orders.

# The growing role of e-commerce during COVID-19



**Izabela Piotrkowska**

iSpot

**We faced an unprecedented situation that forced us to immediate re-modelling of our business for the time of crisis. The sales in our 25 stores lapsed within one day and the only channel that keeps doing sales is the online one.**

Thus we faced the new challenge: how to be able to fulfil increased sales with maintaining high quality of the service and how to maintain good relations with our Customers?

We made a decision to reorganise the work of online department and shops. Qualified employees of the offices reinforced operationally both the Digital department and the warehouse, thanks to which we can take care of the highest customer service despite the dynamic situation on the market.

**All our departments, including the workers in the offices have been adapted remotely to be able to advise, support and fulfil the sales without waiting for the situation to grow.**



**Łukasz Grajewski**

Worldbox, Sklep Biegacza

Before COVID-19 many brands aimed at the realization of a strategy of the omnichannel model, where traditional shops had a role of showrooms – places where customers could meet geeks and experts of a particular business field.

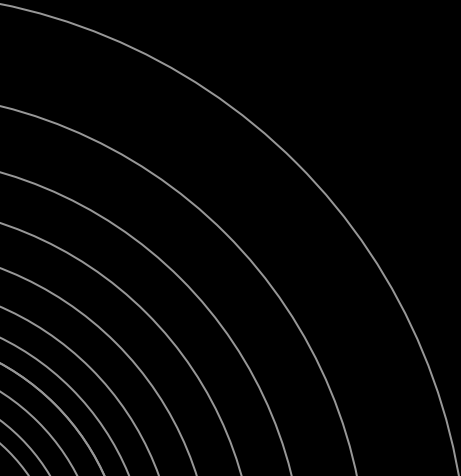
**During the epidemic the trial of transferring experience from offline into online is becoming a challenge.** Any activities that allow to demonstrate human, expert and passionate image of the brand on the Internet are at a premium. It is worth placing importance on technology of video communication in the real time – organize video advisory, webinar cycles or live streaming.

It is also a chance for niche specialists who can show themselves to a much wider audience than to the local community. **All of us need now the sense of belongingness, therefore brands should use this time for building real communities around them.**

section

**2.**

**Fears & first  
counteractions**



# Fears & first counteractions

## What are your 3 biggest fears concerning the COVID-19 situation?

Decline in sales	60%
Logistics Block	36%
Supply chain breakdown	35%
Employment reduction	33%
Decline of financial shape of the company	32%
New shopping habits (reduced prices, free returns, etc.)	25%
Cost reduction and limiting the investments	24%
Bankruptcy	21%
Bigger competition in Digital	18%



**Andrzej Mizerkiewicz**

British American Tobacco

**One of the key trends that happened right after COVID-19 pandemic hit the EU was an immediate reversal of the Lean approach that was cultivated across multiple enterprises for years.** In case of any event that might disrupt requested fulfillment and supply chain areas the most organic response of business is to stock as much as possible to mitigate very possible occurrences of stock shortages.

This also has a ripple effect on manufacturing that becomes critical and a single point of failure in those situations for the entire company (if we cannot produce, it doesn't matter how well we are stocked up). Given those two into account, **securing logistics which becomes a bloodline of our entire commerce is the key.**



**Marcin Bąk**

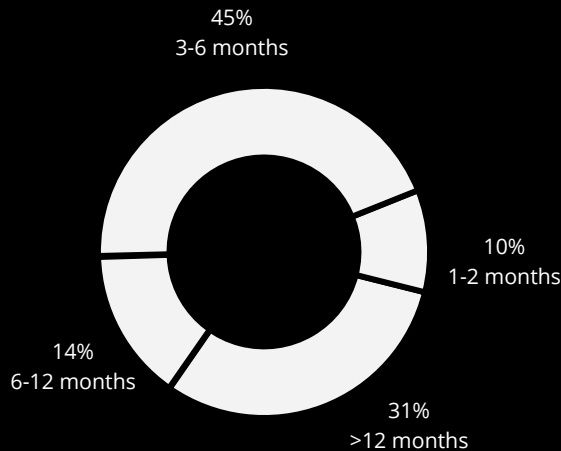
ALFAPARF Group Poland

The current situation puts the beauty business against a big challenge. We are facing possible increases of unemployment and closing up of hair and beauty salons. **Current situation may potentially affect the reduced demand for professional services,** and that might have a long-term negative impact in the segment of professional products.

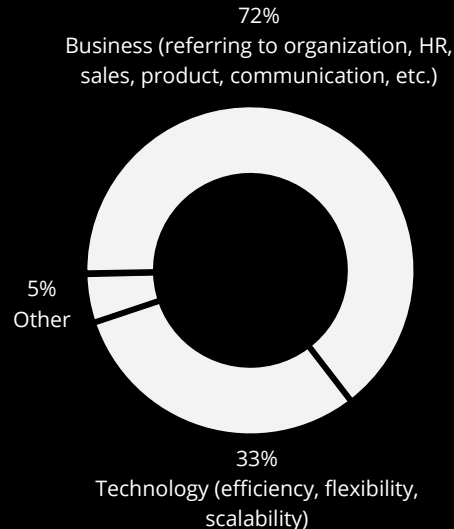
A good direction now may be online communication oriented at building the image of an expert brand, and also increasing the customers' sense of security connected with taking care of sanitary conditions in premises. Companies should also put more emphasis than before on winning customers over online in the times of social problems resulting from the phenomenon of social distancing.

# Fears & first counteractions

In your opinion, how long will the current crisis affect shopping behaviours of the consumers in e-Commerce?



What problems are you facing in the process of quick adaptation to the changing business circumstances?



Now we know that the crisis on the market is not going to end soon. Half (55%) of the experts assess that the crisis will affect the shopping behaviours in the perspective of the nearest 6 months.

The other part of the respondents are drawing up black scenario assessing the potential of returning to the part of previous consumer behaviours for the period of over 6 or even 12 months.

Long-term perception of the crisis connected with the current situation affects the strategic business decisions that are made today and significantly alters the properties of the past actions, which we will talk about in the next part of the report.

# Fears & first counteractions



**Joanna Nawrocka**

Nespresso

**The main problems of companies include staff shortages, most of all. Many companies are also struggling with the organization of work in the form of home office. It often happens that especially customer service sections are not prepared for this kind of work, particularly in terms of equipment.**

Retailers whose offline shops are closed must face the situation in which shop employees are becoming 'unemployed' at that time. Both the problem of fulfilling the sales and maintaining the employees' commitment as well as permanent contact with the company, it is a challenge for many businesses.

When it comes to technology, many companies observe increased website traffic which has a significant impact on the efficiency of the websites' performance. Shops are not often prepared for such a large activity of the users. Flexibility of implementing changes on the websites in many large organizations is too low at the time when we expect quick response to changing conditions. This is why in the area of choosing e-commerce solutions we need to make choices considering the following criteria: efficiency, flexibility, scalability and quick go to market.



**Michał Opacki**

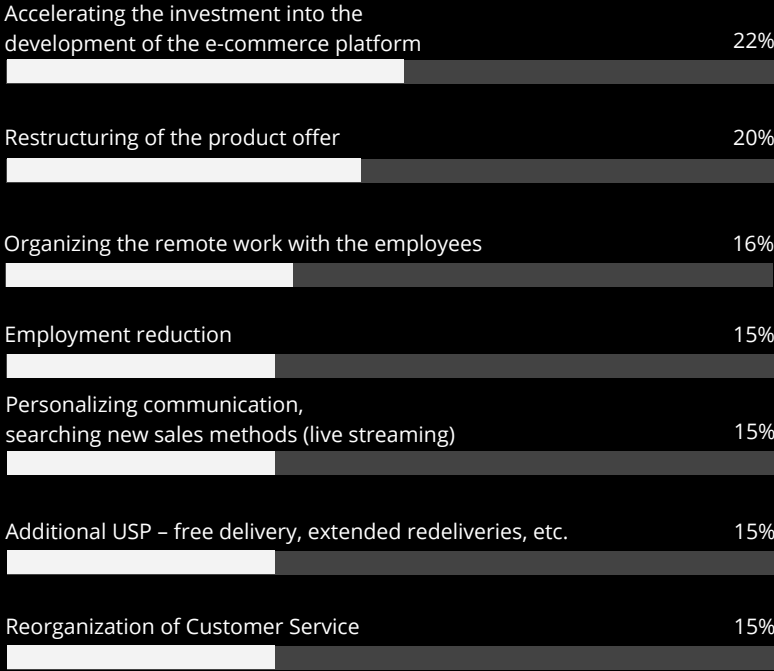
Żabka

Operational excellence, efficient infrastructure, visionary leadership, smooth internal communication, digital readiness... you name it. If it had flaws or was non-existent a month ago, it is really painful and damages businesses severely today. At the same time, even small past investments in applied flexibility (agile ways of working), modern technologies (like tools for remote work, cloudbased repositories, etc) or elements of holacratic thinking with focus set more on goals than processes, pay off quickly nowadays. Mirrors may seem crooked and everything is skewed, but either is reality.

Leaving that kind of house isn't easy. Some chose to stand still and wait. It works well when you are patient, have deep pockets and occupy a safe spot. An alternative, tempting for some, unavoidable for others, is to move fast and... occasionally break things. **The organizations that can thrive are the ones that feel intuitively where the exit is (vision), are not scared of hitting hidden obstacles (test and learn), change directions quickly (pivoting) and have some luck.**

# Fears & first counteractions

What are 3 most important actions that you are taking currently in connection with your e-commerce business operating?



# Fears & first counteractions

**E-Commerce is becoming a strategic channel, which we could read on the previous pages of the report. It is not surprising then that the first activity taken by people who are responsible for Digital in the organization is an extra investment into Digital marketing.**

What's important, it is a really well-thought decision since 28% of the respondents indicate the need of revising the marketing plan and building communication suited to the current situation.

Collaterally to the decision **43% experts indicated the need to increase the budgets for Digital marketing**, 31% of them decide to reduce the costs. In the further part of the report we will present what areas exactly it concerns.

The second activity taken by the experts concerns decisions connected with logistics. Internal one – reorganisation of the warehouse working schedule, security of the employees as the key persons who maintain the operations of online sales; and also

external one – the organization of new delivery and pick-up methods, cooperation with the couriers in terms of delivery dates or pick-up places (closed shopping malls).

**26% of the respondents declare that in response to the crisis, the key decision will be the reduction of prices**, allowing to maintain the sales in the businesses that record declines or increase it in the companies in which disharding the slowly moving stock in traditional shops becomes a challenge. It can be also observed by consumers who are increasingly chased by many new promotional actions and attractive offers.



# Fears & first counteractions



**Michał Wojas**

Wojas S.A.

Today many companies, especially from retail business, must rely just on online sales. Shops are closed and B2B customers refuse or postpone further shopping in time for the sake of maintaining cashflow. Bearing in mind the facts mentioned above **companies decide for desperate acts to intensify the online sales**, to have the financial resources for the payment of remuneration and operational costs. Therefore, since in the very first days of the pandemic in Poland we could observe increased promotional campaigns, interseasonal sales, discounts up to 70% etc., extra discounts that come with the sale, etc. The margins are not a priority today.

On the other hand we have consumers, full of fear about maintaining workplaces at the time of crisis. **This uncertainty is already decreasing the tendency to consume the goods of the second need** – after all, we can survive without a new TV set or an extra pair of shoes. So there came this hopeless situation where companies will run a very aggressive pricing policy so that prospective customers, the number of which is much smaller than two weeks ago, will decide to purchase their goods.



**Jarosław Banacki**

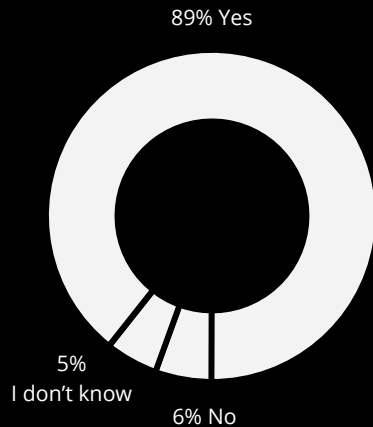
Cyfrowe.pl

Currently we can observe the increased movement in the e-Commerce area. Consequently, the logistics of many online shops is overloaded. During #stayathome people order online more often. **Warehouses struggle with the scarcity of workers** (e.g. child care or sick leave), and then in many places the traffic is just like in December. The choices of customers are run by fear, fear of contacting people (courier, postman), and even fear of touching banknotes.

**As a result of that, the service of parcel lockers is growing to be the leader of delivery choices in online shops, and the choice of charges forward drastically declines.** The e-commerce business should absolutely offer the delivery to a parcel locker and promote electronic payments. A good solution, not only for this difficult time, will be a large choice of delivery methods like 2 courier companies and parcel lockers.

# Fears & first counteractions

Are you changing or planning to adapt marketing communication to the COVID-19 situation?



**Kamil Jodelko**

Sephora

The last weeks in Poland and in the world have shown that by spending more time at home, many customers eagerly decide to do shopping online.

**Let's remember, however, that the coronavirus pandemic is not Black Friday and our way of communication during these tough times should be appropriate to the whole situation.**

Informing about price promotions should be more toned down and humorous notes should be resisted.

Moreover, in these hard times the way of building better relations with Customers

may be a stronger emphasis of CSR activities.

A role model on the market may be the example of 4F brand performance. Their action has immediately become viral on the net and it was captured by the media.

Their online shop simultaneously communicates CSR and seasonal sales of the products which seems to be a definitely suitable dealing since it takes into account both business needs of the company and social responsibility.

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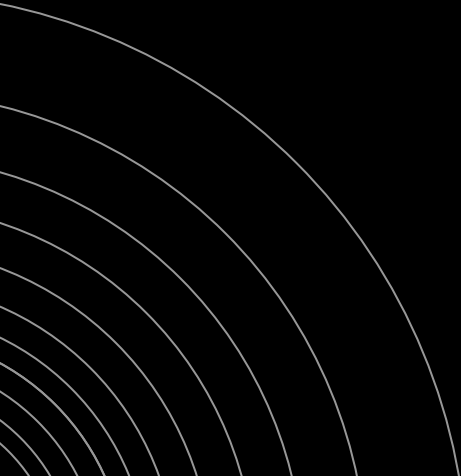
# 3.

**COVID-19**

**Business Impact.**

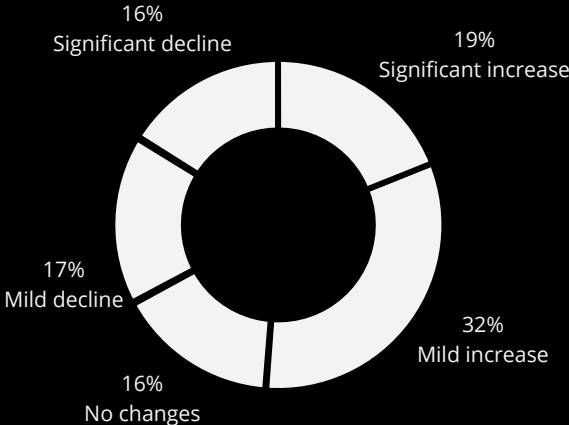
**Digital business**

**in numbers**

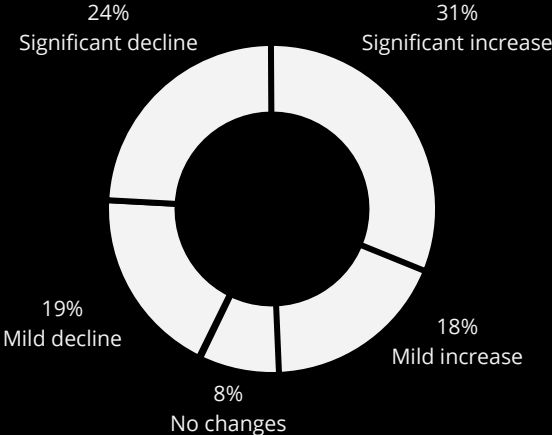


# COVID-19 Business Impact. Digital business in numbers

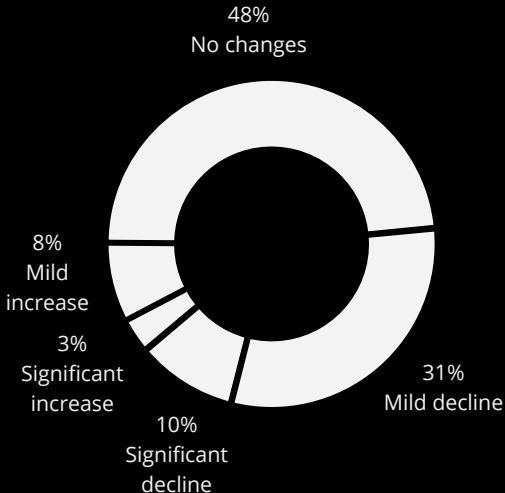
What results in traffic on the website have you recorded currently?



What sales results have you recorded currently?

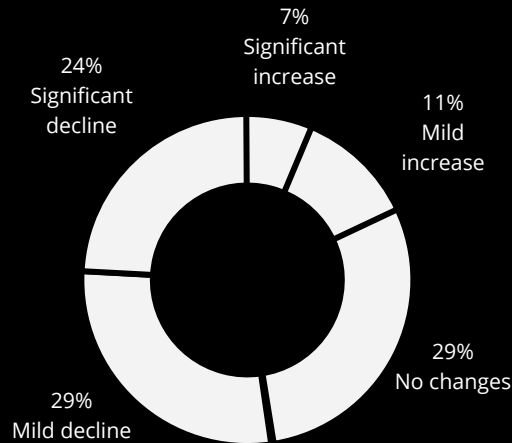


What % margin are you fulfilling in the current situation vs. assumptions / beginning of March?



# COVID-19 Business Impact. Digital business in numbers

How does the crisis affect the yield of the marketing?



The largest risk from the perspective of market stability seems to be a huge polarisation – 49% of experts record increases and collaterally 43% of the businesses record decreases. Furthermore, except for food, pharmacy & cosmetics the study did not show any clear-cut trends for particular product categories. An identical polarization (50/50) may be observed when we look at particular categories, e.g. fashion, interior design, jewellery and watches or electronics.

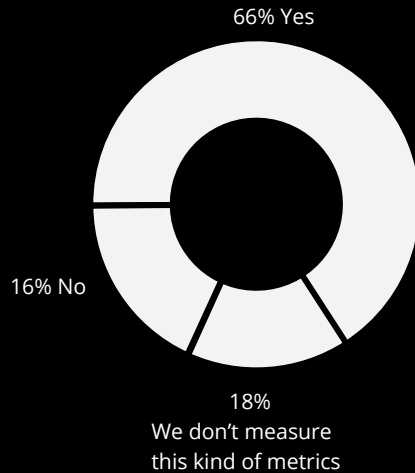
So what becomes a factor of success at the time of the crisis? It seems it is not a matter of category of the sold products but the skill of effective marketing communication, fast presentation of dedicated offer for the customer who still remains on the market, ready to purchase, or a skill of directing the customer from offline into online, who still constitutes a minor percent of the whole commerce.

The margin – it grows explicitly only in the shops with increased sales. Those are mostly businesses that gained profit from the crisis, such as food, cosmetics or medicines as a products of first need and they can afford raising the prices at the time of increased demand, often with limited supply. **41% of the shops record margin decline**, which seems to be the reflection of discount activities that are run in order to stimulate the revenues.

53% of the businesses record also the decline in the profitability of marketing activities, the cause of which might be the decreasing demand for many categories with simultaneous attempts of increasing the supply of advertisements by the brands trying to compensate for sales declines. Interestingly, out of 49% businesses declaring sales increases, only 16% of experts declare increase of marketing profitability which can illustrate the general situation of growing competitiveness of advertising business.

# COVID-19 Business Impact. Digital business in numbers

Can you see the flow of customers from offline into online?



**Piotr Frankowski**  
DUKA

For most companies from the retail sector the restrictions introduced on 13th March this year, connected with moving and commerce through offline sales located in large format shopping centres mean the loss of significant sales or total restriction.

COVID-19 brought electronic economy to a totally different level – it has become even more mass and accessible. Up to now a lot has been said about strategies and building the presence of the brand in the online ecosystem. Taking into account the current situation on the market and the forced change of shopping behaviour **today the winners are those who were prepared and concentrated on building their presence in Digital.** Regardless of how well-known and large brand they are. The conclusion coming out of the current situation is very clear: focus your actions on building up the strong presence online.



**Karol Zych**  
Calzedonia

The transfer of customers from offline into online in the current situation seems to be a natural situation. The ROPO effect ceased to exist overnight. **For the customers of traditional stores it's a completely new situation.** They need to adapt to the conditions and convince themselves to e-Commerce or temporarily quit shopping. The sensibility of that change will certainly vary in different segments of the market. Moving to e-Commerce is harder for the customers of investment products, e.g. furniture segment, than it is for, say, fashion customers.

It may be really significant to properly use customer data, to activate offline customers into online ones. **Emphasising the safety of e-commerce shopping, the simplicity of the process** and additional encouragement in the form of **free delivery, returns or special offers seem to be a good idea.**

# Newsletter

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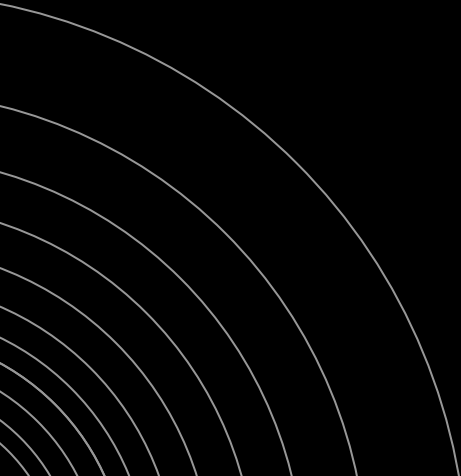
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section

**4.**

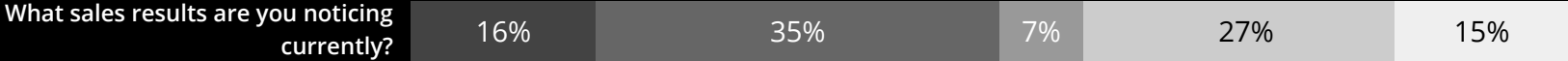
**Business Forecast  
for Digital**





# Business Forecast for Digital

As a time flow, how is Digital going to change in the upcoming months?



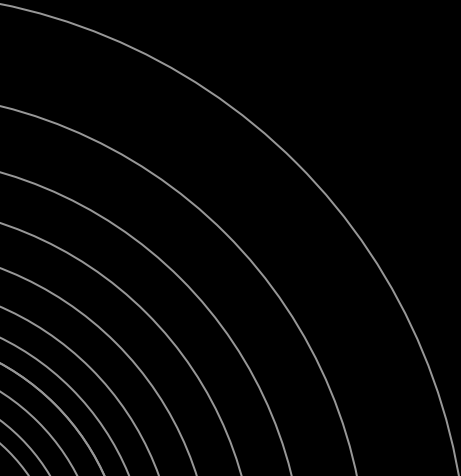
■ significant increase   ■ mild increase   ■ no changes   ■ mild decline   ■ significant decline

Although the results from the last month show that almost 50% of studied businesses in the e-Commerce area is growing, **DEC experts predict that it is the nearest 3 months (April-June) that will reveal the real crisis on the market.** 54% of the respondents predict sales decreases in their shops, increases are estimated by just 36% of experts. Predictions of shopping moods will come back after the period of 3 months (around July) where 51% of experts predict rapid increases. There is still a large group 42% of experts assuming the black scenario of further economic recessions and sales drop of their products.

section

**5.**

# **Investment Matrix**



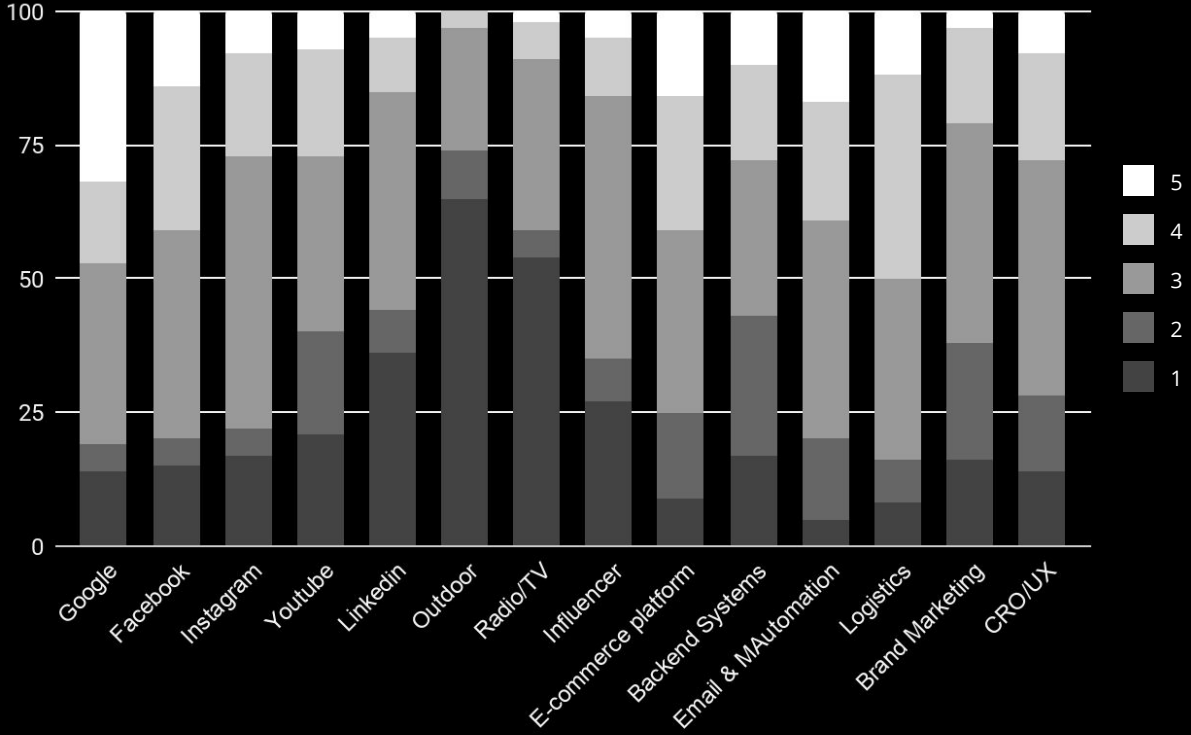
# Investment Matrix

What investment approach are you planning in specified Digital areas in the upcoming months? Grade 1-5:

1- strong limitation of expenses

3 - remain the same

5 - strong investment



“

**There comes a time of meticulous counting of every penny spent on marketing and performance marketing will be a strong direction.**

## Investment Matrix

**For the time of crisis Digital Executives are planning the optimisation of the expenses concerning ATL** – media budgets at Influencer Marketing, Brand Awareness, Outdoor, Youtube, LinkedIn or TV and Radio will be reduced. This is the answer to the necessity of sudden limitation of expenses in the organization also dictated by cutting off traditional, physical sales often supported by the media mentioned above. Facebook, Google, Marketing Automation – there comes a time of meticulous counting of every penny spent on marketing and performance marketing will be a strong direction.

It seems we can also expect that the decisions connected with e-Commerce platforms will be not only polarised but also oriented at their strong development. The priority for Digital in the organization also sets up new challenges and changes the priorities in IT, and as a consequence, the managers will respond to it by increased investments in this field.

An area that is strongly polarised is the environment surrounding e-commerce: ERP, PIM, CRM – the budgets in this area will remain unchangeable. **It looks like the priority for the organization will be firstly focusing on the e-Commerce platform itself, that will provide the customer with direct value and increase.**

# Investment Matrix



**Katarzyna Wszyńska**

Yves Rocher

**There are not many professional fields where e-commerce solutions do not exist or are not planned to be implemented.**

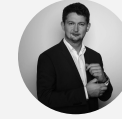
Omnichannel approach to business, diversification of distribution channels, customer-centric optics and thus enabling the customer keeping in touch with the brand through all available touchpoints are just a few of the reasons why e-Commerce solutions should be a standard. It's a must have for the majority of businesses.

Time in which we came to find ourselves (Quarantine 2020), shows this exactly. For many companies the opportunity of fast redirecting the customer to the online channel is a chance of getting out from the quarantine less savaged in terms of business.

**However pathetic that may sound, currently e-commerce saves lives.**

An individual customer has constant contact with the offer and allows to keep the business going. If anyone has wondered whether to implement e-Commerce solutions this year, 2020, I am sure they changed their mind and they are already planning it.

Just like companies wondering about the electronic records of documents, network solutions that facilitate remote access to the data and enable working on them. The whole instrumentation of business intelligence systems have a bright future ahead of them. The investment into integrated CRM systems, extensive CMS solutions, logistics management, e-Commerce platforms will all start to gather steam. **So, if they are asking me whether to cut anything or not – my answer is: do it very mindfully. Do not seek savings in technology or online.**



**Marek Dorsz**

OBI

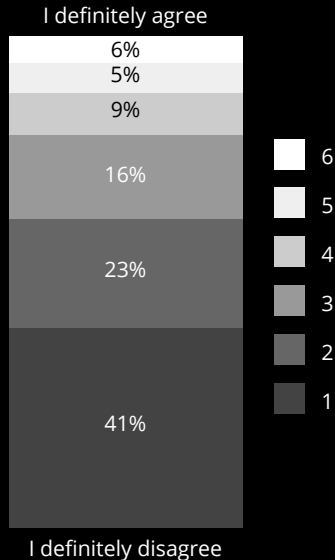
**We are going through the time when the Lockdown leads to drastic changes in consumer behaviour. Brands must learn in almost real time how to communicate with customers.**

To my mind, building brand marketing for many companies does not really make sense these days. We can see the awareness of it in the moves of the largest brands that are stopping many reach activities today.

Limiting this type of campaigns does not and should not mean cuts of marketing budgets, we should rather allocate them in the channels that reach our customers directly. **These days we must definitely aim at the channel and campaigns that bring high ROAS.**

# Investment Matrix

To what extent do you agree with the cost-cutting strategy in the e-commerce area during COVID-19?



**Marta Perwenis**

Play

**The current situation made many companies realise that the lack of investment into Digital was too conservative and wrong decision.** In spite of the fact that the market and consumer behaviours were changing before our very eyes and there should be no doubts that online sales will be crucial, many managers did not want to notice it. The main cause of such an approach was looking at it from the 'here and now' perspective, e.g.: 'Our customers are not ready yet for shopping via the Internet', 'The participation of online sales is still too low', etc.

**With the current pace of changes, we cannot allow this kind of mindset.** Everything is developing so fast that you need to be flexible, ready to respond effectively, which is not going to happen without appropriate investments. The current situation is a test for the e-Commerce market.



**Mariusz Serafin**

Lancerto

We can list many examples of brands that took the benefit from maintaining advertising budgets at the time of economic slowdown. The companies that maintain advertising budget, adjust their communication or do both of these things at a time, may be able to gain continuous increase in sales and participation in the market, as opposed to those that limit their budgets.

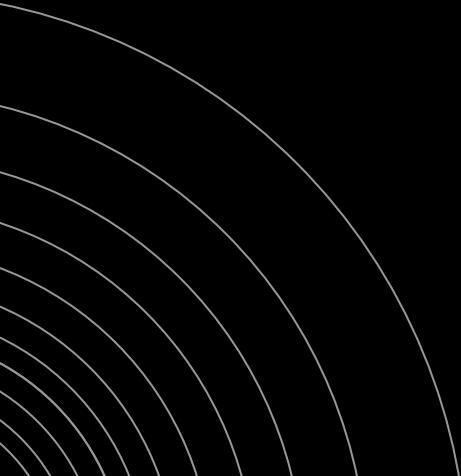
However, **understanding that phenomenon requires really broad knowledge and analysis of Customer Journey**, namely the whole set of interactions that the customer deals with during the buy-in process.

**What is even more important is noticing the changes that occur on that path of decision-making during the crisis.** Such an analysis constitutes a good basis or establishing KPI indicators and determine how your market looks like in a tough environment.

section

**6.**

**How to manage  
during COVID-19?**



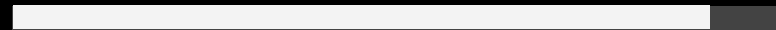
# How to manage during COVID-19?

What are the 3 key competences of an effective Digital / e-Commerce Manager at the time of the COVID-19 crisis?

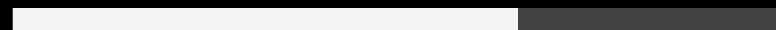
Flexibility, readiness for quick changes 47%



Agility in taking decisions 43%



Analytic skills 31%



Soft skills & remote work organization 28%



Strategic thinking 24%



Innovativeness and creativity 24%



Specialist skills in the areas belonging to managers 19%



Effectiveness in decision implementation 15%



Accessibility, determination and commitment 15%



Stress resistance 13%



PR 9%



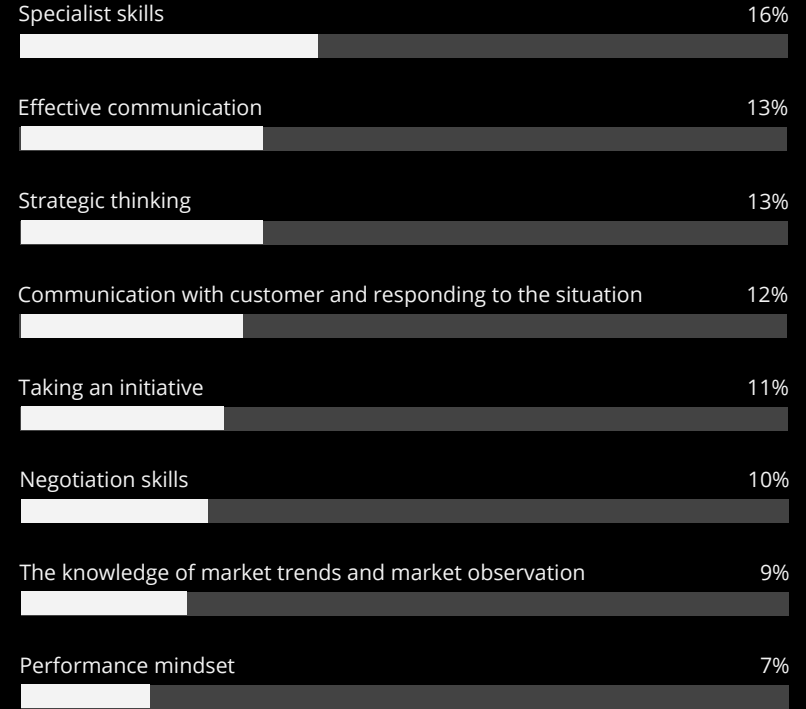
The skill of taking uncomfortable decisions 8%





# How to manage during COVID-19?

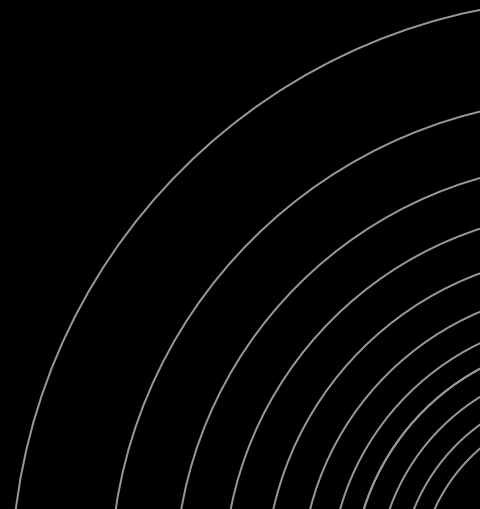
## What are the 3 key competences of an effective Digital / e-Commerce Specialist at the time of the COVID-19 crisis?



“

**It is worth bearing in mind  
that avoiding failure is  
avoiding progress.**

**digital**experts



# How to manage during COVID-19?



**Aneta Kazanowska**

VRG S.A.

This unusual situation where we all found ourselves in, forced Digital Managers in a fast and unpredictable way to implement changes within the Digital area management. The qualities such as flexibility, readiness and seeking changes, agility in taking decisions and convincing the superiors to their legitimacy became the key competences that are essential for action at the time of crisis.

**In crisis management an important aspect for the Digital Manager is to possess soft skills in the communication with the team** – restraint and suitable motivation are of vital importance in order to maintain the team's stability and commitment to work.

The last challenge is cooperation – **the managing people should be able to share their knowledge and gain experience from other managers, especially at the time of crisis.** It allows taking the key decisions quicker and better. There is no time for mistakes. I am glad that while working in this difficult time for business I meet people who place importance on the very last competence because it allows all of us to make better decisions.



**Paweł Grzebyk**

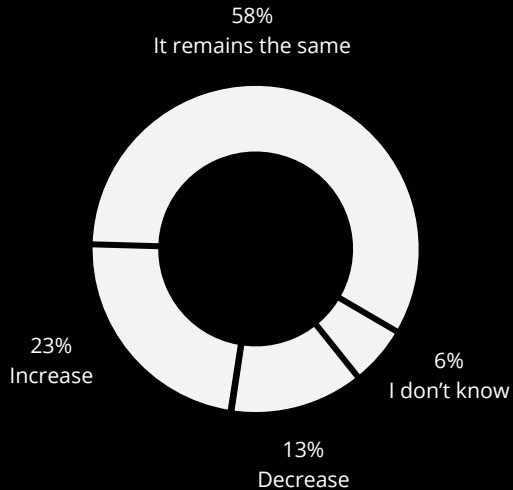
DeeZee.pl (CCC S.A. Group)

In this special and unpredictable time, it is Digital Specialists who begin to play the crucial part. In the situation of crisis management and commonly functioning remote work, particular skills are gaining major significance. Good understanding of business processes allows us to deal with this dynamic reality. **The ability of analytic thinking and fast conclusion-drawing help us predict the results of the measures taken.**

What is invaluable in remote working is creativity, independence in problem solving as well as the skill of self-organization. No less important is stress resistance. Working in an innovative Digital field tends to be demanding because it often requires defending your own ideas. **However, it is worth bearing in mind that avoiding failure is avoiding progress.**

# How to manage during COVID-19?

Are you planning to increase or decrease your Digital team in the nearest months?



“

**Crisis is certainly an opportunity for many Digital specialists, to grow up in the organization, fighting in the front line.**

Despite the declines in around a half of e-Commerce businesses and the prediction of further declines of most businesses in the nearest 3 months, only 13% experts declare the reduction of employment in Digital teams.

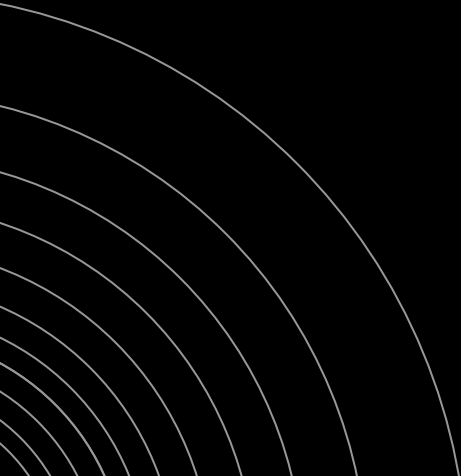
Most specialists will then remain in their positions and simultaneously there will be new job posts created for them, in the businesses that gain profit from the economic crisis and in the organizations that have just started the intense creation of their Digital sections.

section

# 7



# How will the New Normal of Digital look like?



# How will the New Normal of Digital look like?

What e-commerce consumer or business trends do you anticipate after the COVID-19 finishes?

## Anonymous statements:

"Increase in the Digitalization of the society."

"Increased number of e-Commerce users in older age groups."

"We'll come back for a while to shops and restaurants to enjoy what we lost, but then we will check on our wallets to make sure we can afford it."

"Increasing the participation of large marketplaces at the cost of small shops."

"Return to consumerism may take years (some generations have never experienced real crisis or limitations of citizen liberties)."

"The increase of online share in sales will accelerate."

"Increase of Digital advertising expenses – by stronger moving of companies into online channel."

"Definitely less busy shopping centres."

"For some time people will be looking for physical contact, after so many months in isolation those who win will be companies that will be able to provide top experience."

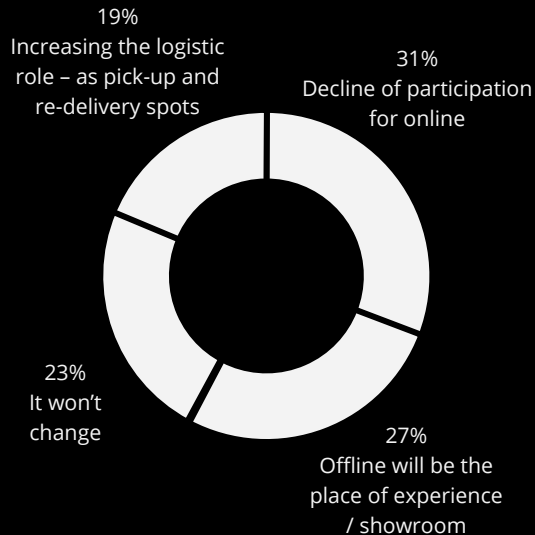
"Large companies will invest into online even more."

"The increase in e-grocery will certainly maintain and stay for longer."

"Organizations will learn to work in scattered teams."

# How will the New Normal of Digital look like?

In your opinion, will the role of offline shops change after COVID-19? If yes, how?



## Anonymous statements:

"Shops will take a new role - touchpoint to evangelize customers, the sale of philosophy, DNA of the brand, lifestyle. They won't be shops anymore, this word is out-of-date and it should be re-defined or replaced with a different one."

"We will observe the continuation in the trend of decreased role of offline shops. Customers may also expect maintaining the new standards of distance and hygiene - cramped shops should rethink the concept."

"Shops and chains themselves will focus even more on the omnichannel kind of approach - building customer loyalty and switching them between online and offline."

"Large chains will reconsider the shop formats and new opening plans."

# How will the New Normal of Digital look like? - Expect the unexpected

What lessons should business learn from this situation for the future?

## Anonymous statements:

"Readiness to remote working and transferring the business to online."

"Crisis planning is important and financial reserve should not be perceived just as expense."

"It's good to have an alternative - flexibility in switching into a different enterprise that may save your business."

"Invest into online processes and get ready for changes in consumer behaviours."

"Working on processes that are easily scaled and implementing solutions ready for fast changes."

"Flexibility of systems to implementing announcements, promoting payment and delivery methods, etc."

"Diversification of: suppliers, workers (remote work, home office), technology suppliers."

"In such situations, we should respond more quickly rather than wait till something more happens."

"Building the culture of innovation and adaptation to the changing market."

"Customer first - the ability of fast change."

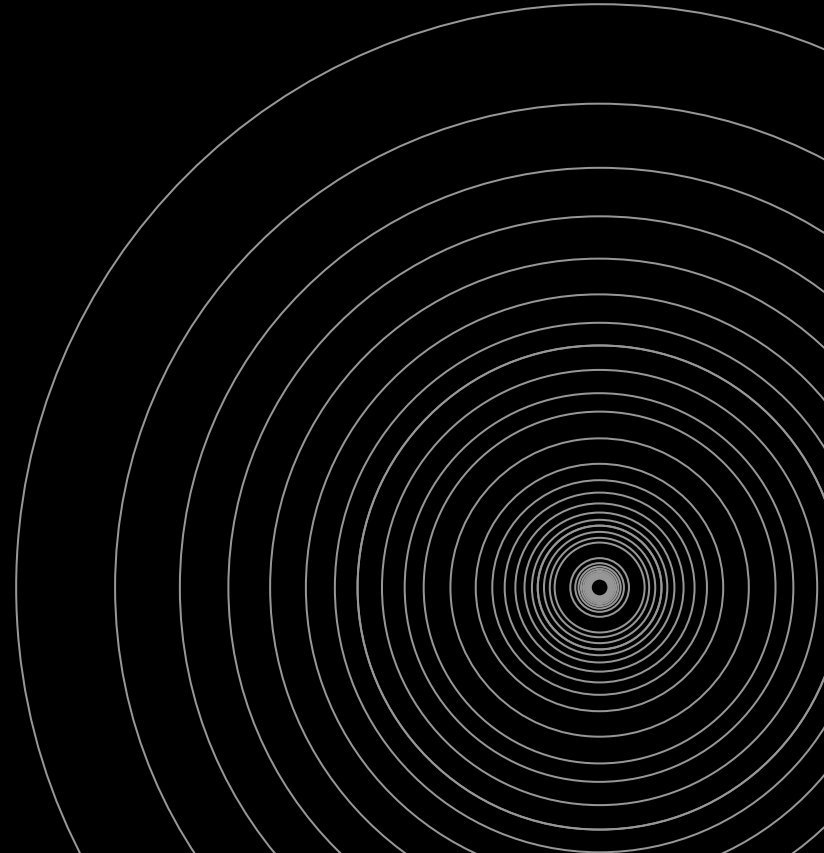
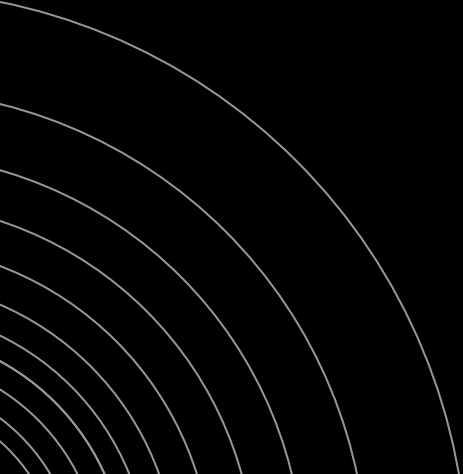
"Finally it's time for real mobile first approach."

"Polarisation of supplies."

"Diversification."



# Methodology



# Methodology

**We collected more than 92 opinions of the Digital Executives on Polish e-Commerce market.  
The data were collected in terms of an online survey conducted among Digital Experts Club experts.**

The survey was conducted in the days 25-27 March 2020. Respondents answered 31 questions.  
The results were published based on the aggregation of given replies.

The structure of enterprises represented by the respondents:

<b>Represented businesses</b>	<b>Business model</b>	<b>Omnichannel model</b>	<b>The size of the enterprise</b> (the number of employees)
Fashion 20%	B2B 15%	Online 21%	0-49 13%
Electronics 14%	B2C 41%	Online & Offline 75%	50-249 23%
Food 13%	B2B & B2C 44%	Offline 4%	>250 64%
Industrial 11%			
Consumer Goods 10%			
Beauty & Cosmetics 10%			
Other 22% ( <i>DIY, Home &amp; Furniture, Automotive, Sport, Pharmacy, Travel, Telecommunication</i> )			

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