

Self Disrupt OR Perish

Sanjay Behl

CEO

Raymond

MMA
MOBILE MARKETING ASSOCIATION

Self Disrupt *OR* Perish

Self Disrupt ***OR*** **Perish**



Self Disrupt ***OR*** **Perish**







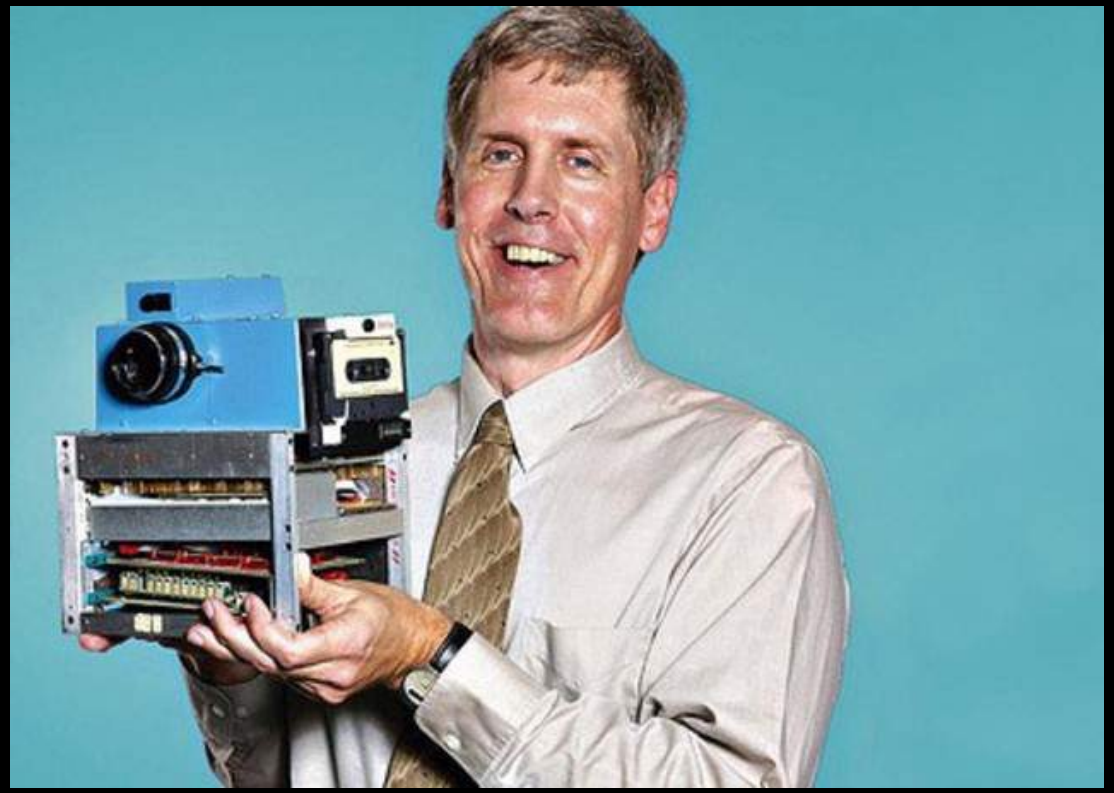
Nov 2007

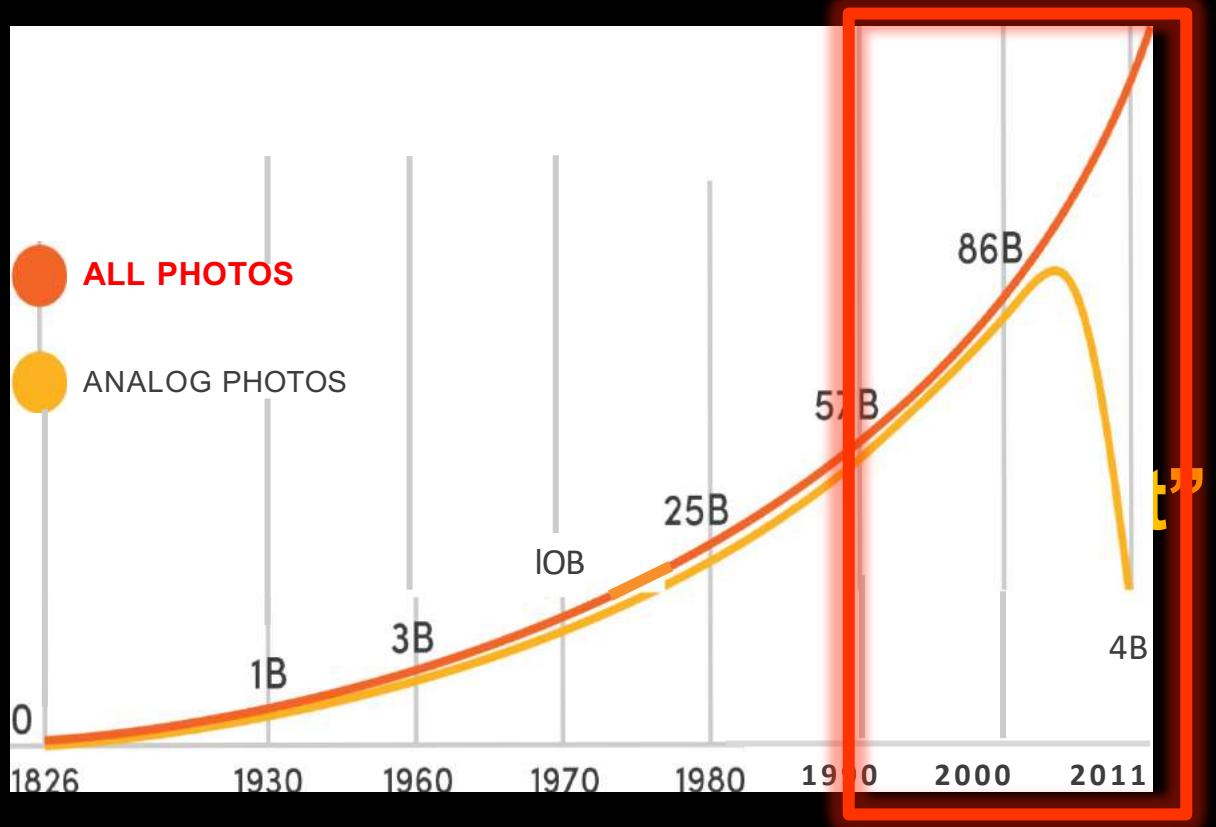


Sep 2012

“We didn’t do anything wrong, but somehow, we lost”

- Stephen Elop, Nokia Global CEO





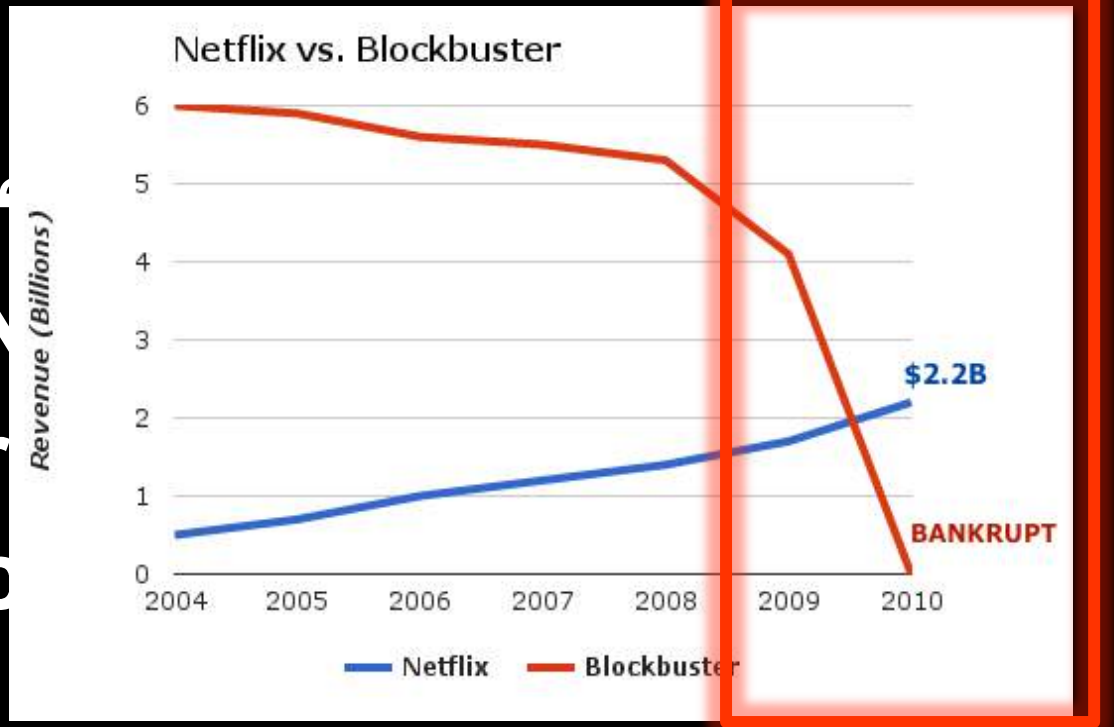
Photos Taken Each Year - 1.2 Trillion (2016)

Steve Sasson

Inventor of Digital Camera, Ex-Kodak



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N
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o



NETFLIX Value Today at $70 Bn

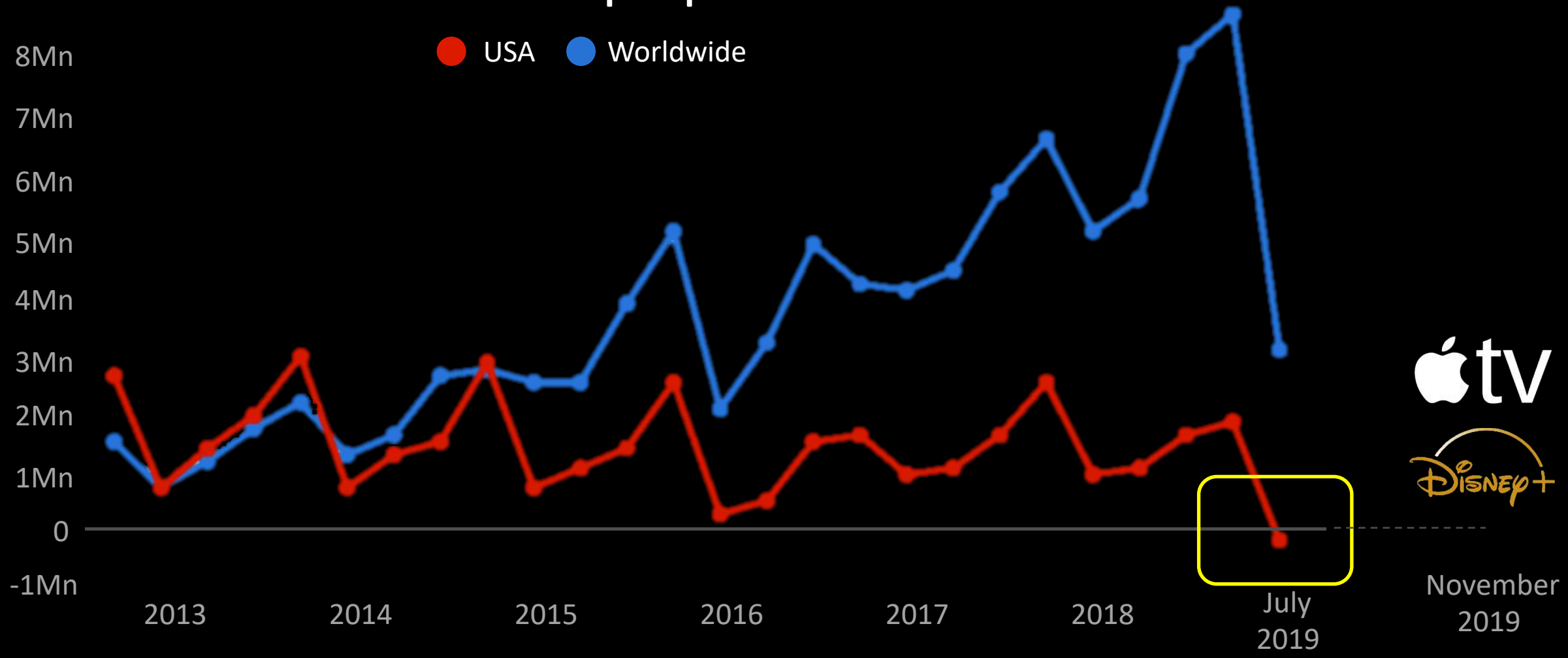
Jim Keyes

CEO, Blockbuster

NETFLIX

Posts first major loss in subscribers in USA Q2 2019

Paid net subscriber additions per quarter




Dabur
Chyawanprash
DOUBLE
Immunity
Parachute
100% Pure
Coconut Oil
Maggi
2-Minute
Noodles
Masala
L'ORÉAL
FALL RESIST 3X
Fair & Lovely
ANTI MARKS
TREATMENT
Colgate
Strong Teeth


PATANJALI
PATANJALI
PATANJALI
COW's GHEE



OLA

#ChaloNiklo

India's largest cab booking service



DOWNLOAD NOW


क्या देश में
भयानक आर्थिक मंदी
आने वाली है?

Leader for Decades

Born Yesterday

Extinct Today



Leader Today

Age, Size, Reputation, Current Sales, Brand Equity, IP

Do they Guarantee Our Existence Tomorrow ?

SONY



Disrupted the

Disrupted by

Electronics Industry





Digital Music



I've got an idea..

"I run a $ Billion Company"

YouTube

Oculus

Dropbox

airbnb

UBER

2-5 yrs

<2 yrs

The average lifespan of a company listed in the S&P 500 has significantly decreased:

- 1920's = 67 years
- Today = 15 years

Photography, Auto, Books, Data, Music, Hotels..... Have they really Perished?



Taxi Fleets



Book Stores



Long Distance



Research Libraries

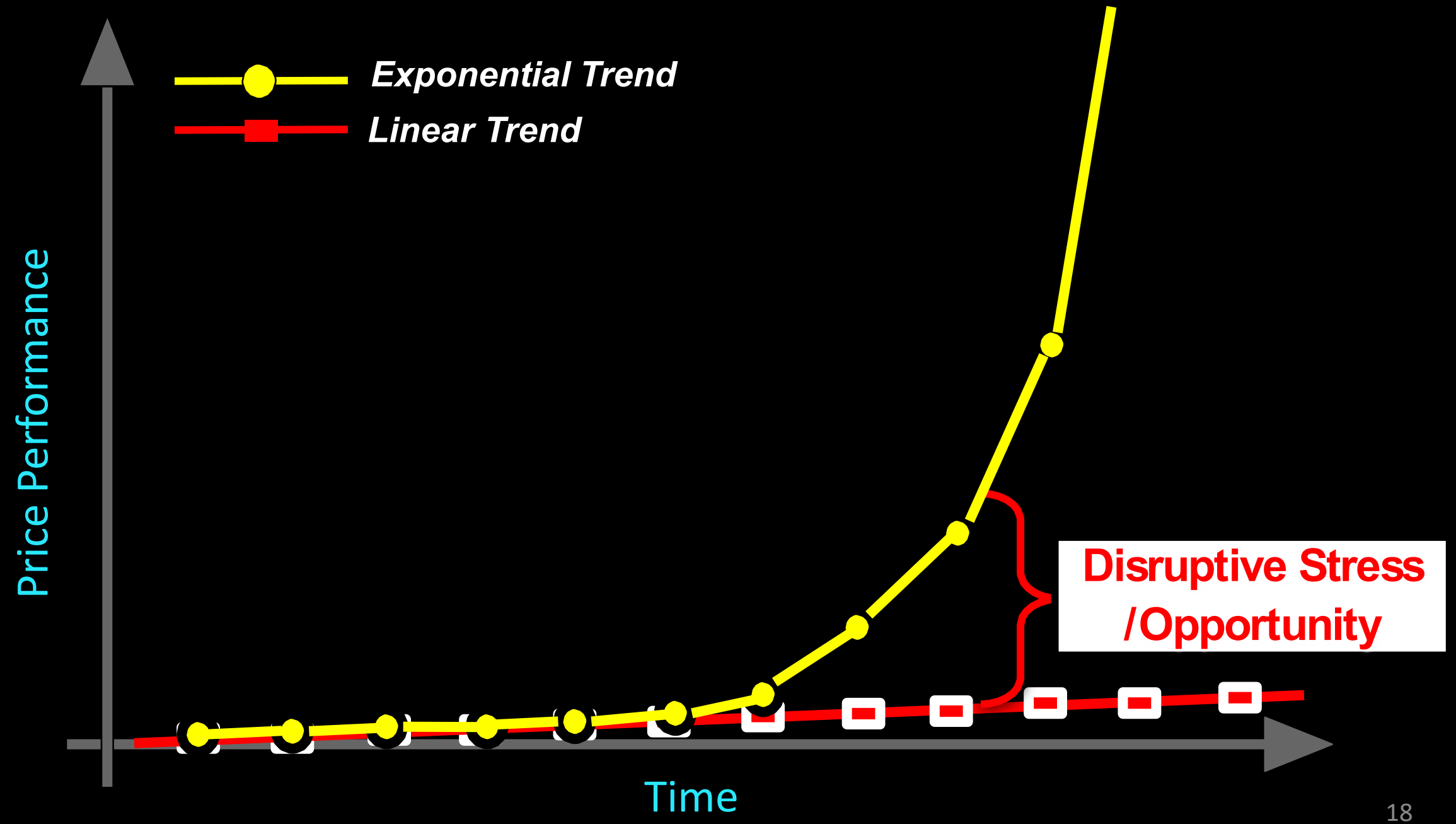


Classifieds



Hotel Chains

……Or Have they merely been Disrupted?


Exponential Trend
Linear Trend
Price Performance
Time
Disruptive Stress
/Opportunity

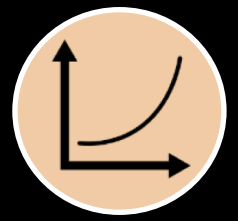
The 6D Paradigm



Digitization



Deceptive



Disruptive



Dematerialization



Demonetization



Democratization

From Scarcity to Abundance

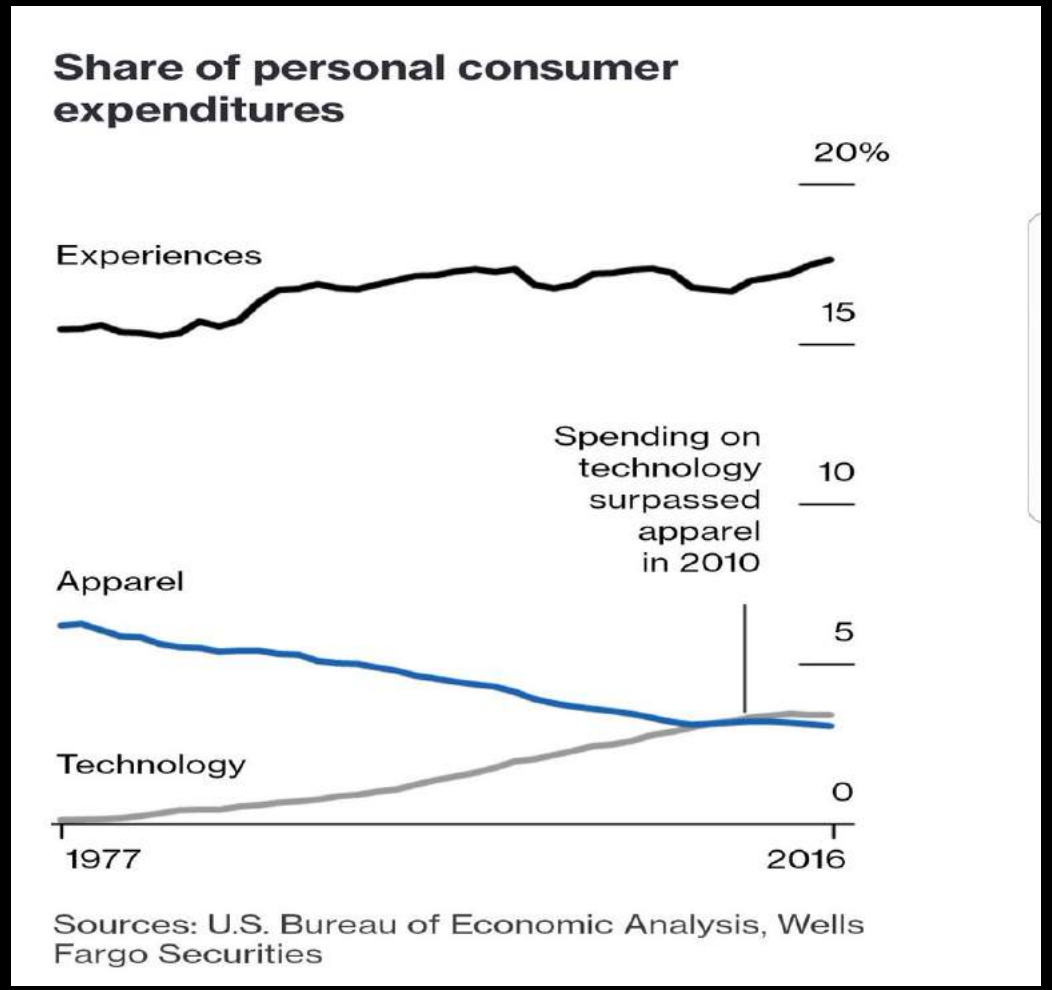


The Death of Clothing

Article in Bloomberg

By Lindsey Rupp, Chloe Whiteaker, Matt Townsend and Kim Bhasin

February 5, 2018



MARGINAL COST OF SUPPLY

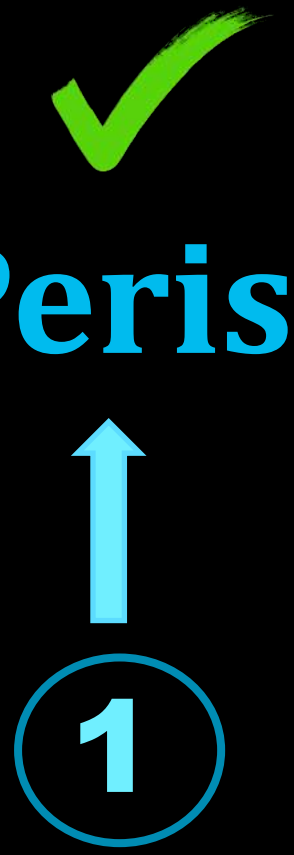
MARGINAL COST OF DEMAND

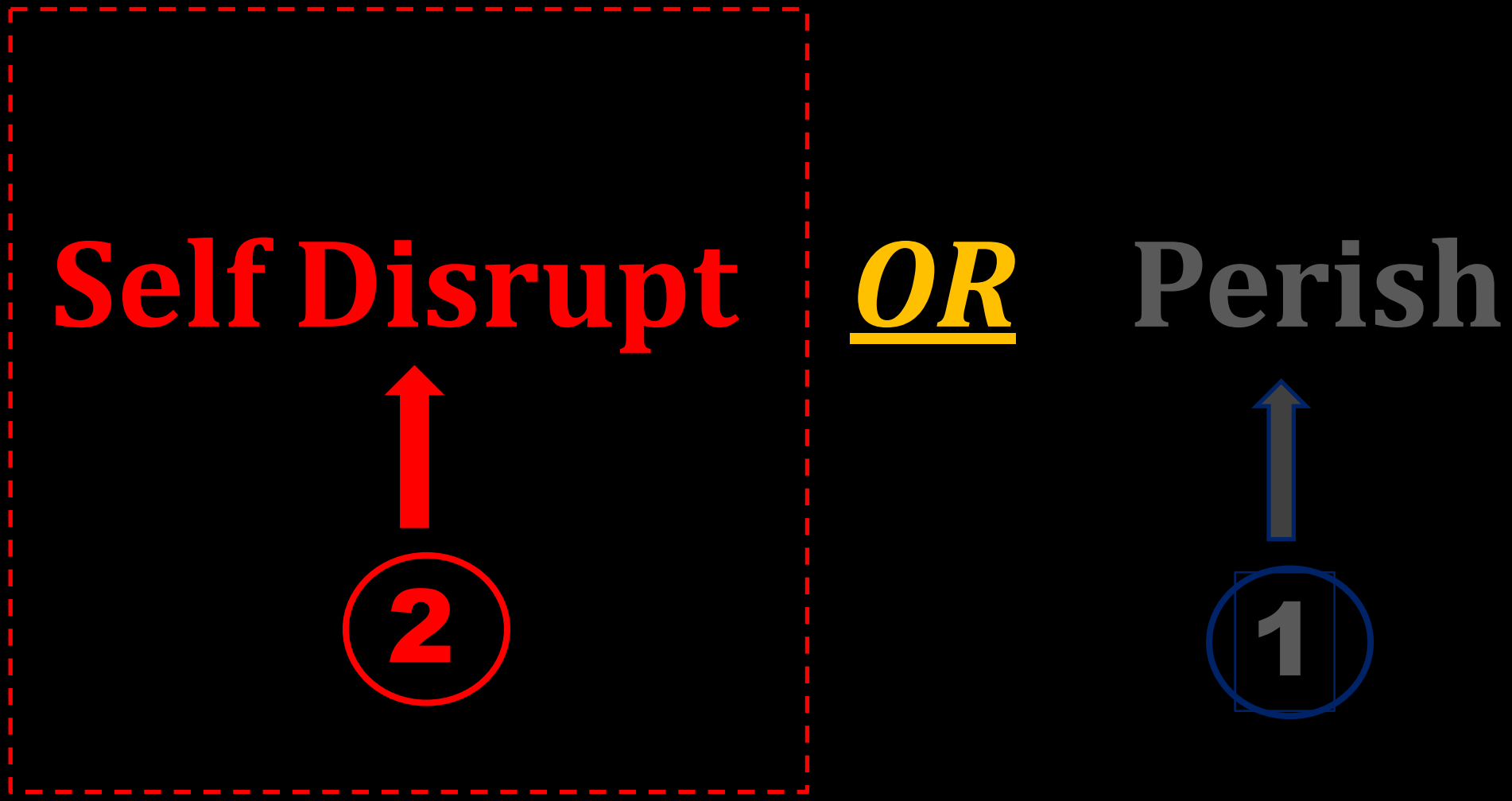




Market Power Velocity

Self Disrupt ***OR*** **Perish**




Self Disrupt
OR
Perish
2
1

3 Steps to Self-Disrupt



Envision

Purpose



Digitise

Value Chain



Build

Orbits

3 Steps to Self-Disrupt

1



Envision

Purpose



Digitise

Value Chain



Build

Orbits

Our VUCA world is getting more VUCA



Time compression *via technology and information*



Global complexity *via geopolitics, climate issues*



New actors *via disruptive startups, new stakeholders*



New organizational forms *via networks vs. hierarchies*



More digital work & flows *via shift to less tangible activities*



Leading in A VUCA World




DOUBLE ISSUE
DECEMBER 18, 2017
Person of the Year
TIME
THE SILENCE BREAKERS
THE VOICES THAT LAUNCHED A MOVEMENT
time.com



#MeToo

Envision PURPOSE of the Brand



Commercial Films & Rolls



Preserving Moments

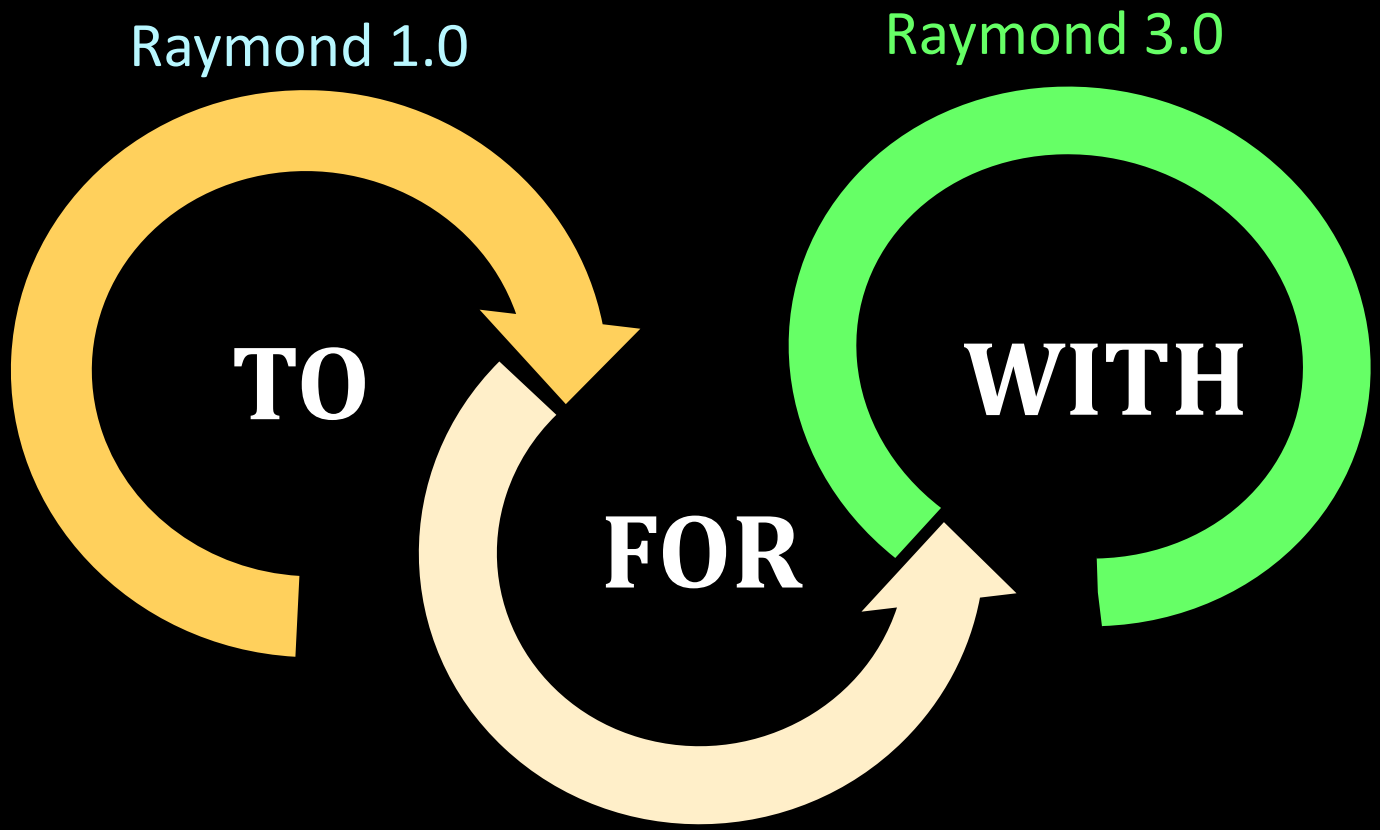
ACT IN ACCORDANCE with the Purpose of the Brand





Symbian OS
Multimedia Phones

Raymond 3.0 - *What is our shared purpose?*



Raymond 3.0 Strategic Direction

Who are we?



Wardrobe Solutions





Lifestyle Experience

Why do we exist?



Look Good





Feel Good

3 Steps to Self-Disrupt



Envision

Purpose

2



Digitise

Value Chain



Build

Orbits

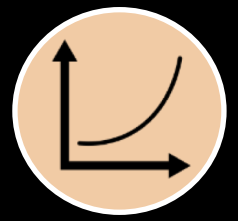
Apply the 6D filter to every node of the value chain



Digitization



Deceptive



Disruptive



Dematerialization

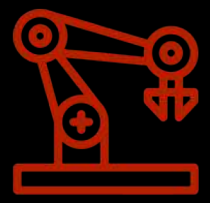


Demonetization



Democratization

Emerging Tech Platforms



Automation

- 3D printing
- Changing operations





Virtual reality

- Virtual/ Augmented
- Increasing Sale

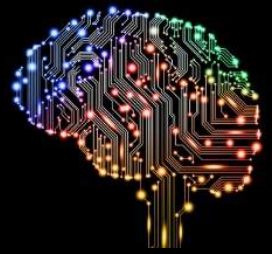




IoT/cloud

- Ecosystems
- Integrated experience





Artificial Intelligence

- AI & Machine Learning
- Consumer journey





Advanced Analytics

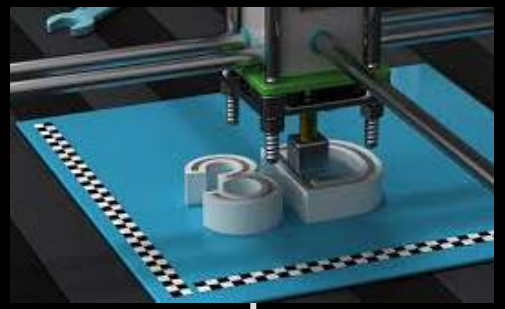
- Portfolio planning
- Targeted Marketing



Future Tech

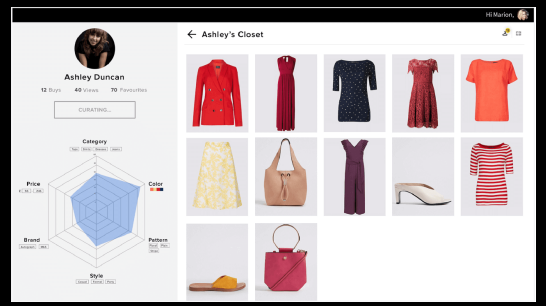
Already Existing

3D Printed Accessories



Personalized Offers





App based Customization

On Horizon

Personalized Recommendation





Digital Body Measurement



Contactless Payment

3D Printed Accessories



	Lead Time	MOQ
Traditional Accessories	60 – 75 days	200
3D Printed Accessories	12 days	1

3D - Disrupting Fabric manufacturing?



<



Machine #1



Machine #2



Machine #3



Machine #4

Vapi plant – Spread over 100 Acres

Four 3D printing machines in 1/2 area of this conference room;

@ 5% Cost; MOQ=1

Already Existing

On Horizon

3D Printed Accessories

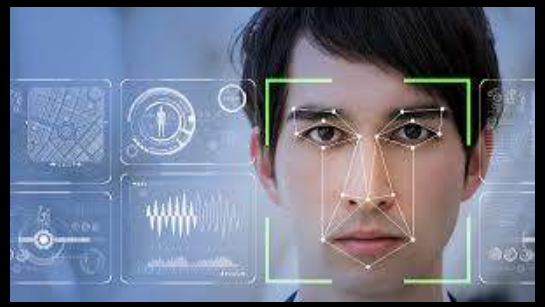
INSCRIB3D
CUSTOMISED 3D PRINTED ACCESSORIES

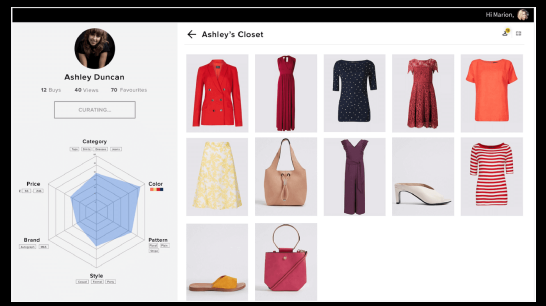
2018

Personalized Offers



Personalized Recommendation





App based Customization



Digital Body Measurement

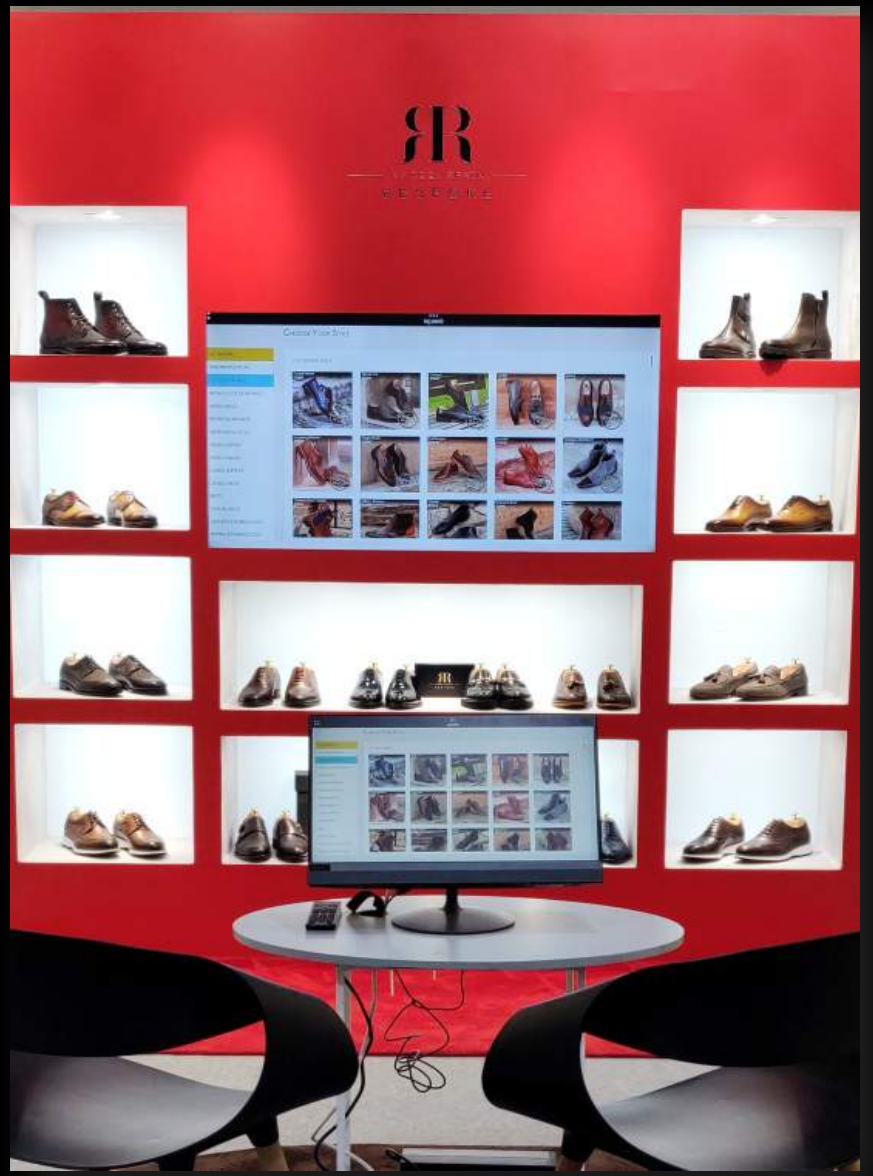


Contactless Payment

App based Customization



200+ Doors Signed Up



Pilot Planned for 10 doors

Already Existing

On Horizon

3D Printed Accessories

INSCRIB3D

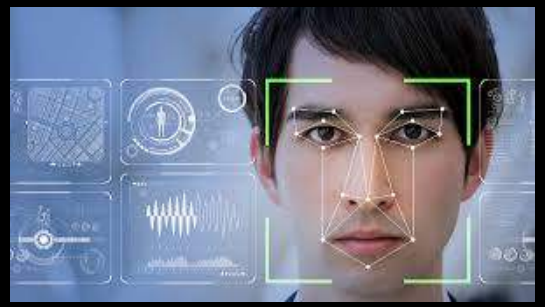
CUSTOMISED 3D PRINTED ACCESSORIES

2018

Personalized Offers



Personalized Recommendation



PARK AVENUE DIY

DESIGN IT YOURSELF

2018

App based Customization



Digital Body Measurement



Contactless Payment


nucleus.vision
ACTIVATED
PERSONALIZATION: ON

Personalized Offers



Early result of Pilot

- Tracked Footfall & Dwell time
- Redemption rate 3X than avg.
- Sales increased by 10%

Already Existing

3D Printed Accessories

INSCRIB3D
CUSTOMISED 3D PRINTED ACCESSORIES

2018

Personalized Offers

Nucleus.Vision

2019

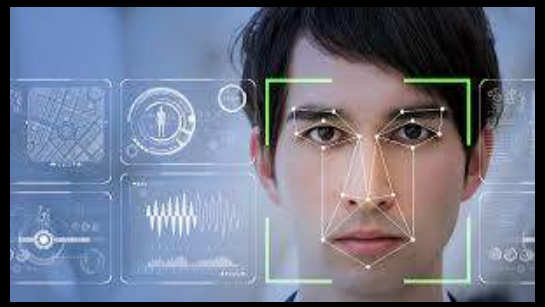
PARK AVENUE DIY
DESIGN IT YOURSELF

2018

App based Customization

On Horizon

Personalized Recommendation



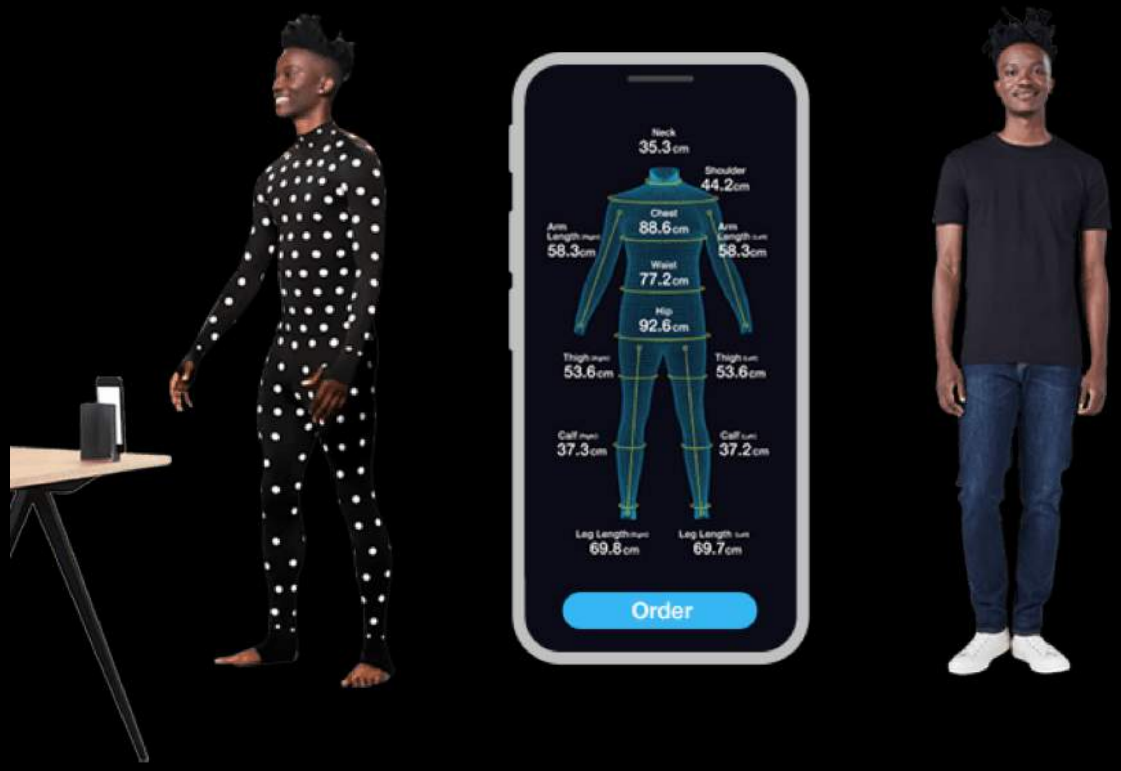
Digital Body Measurement



Contactless Payment



Sizing via standardized garment
ZOZOSUIT



Sizing only via Mobile App
MTailor



Trial Garments Ordered

Wide Variance in Satisfaction rate


MTAILOR

Already Existing

On Horizon

3D Printed Accessories

INSCRIB3D

CUSTOMISED 3D PRINTED ACCESSORIES

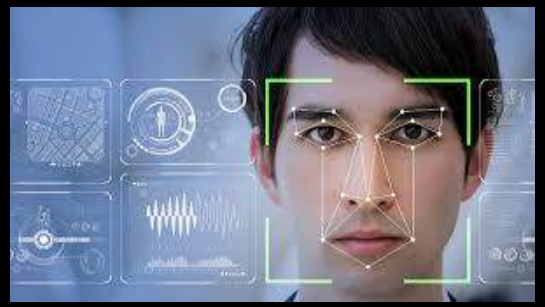
2018

Personalized Offers

Nucleus.Vision

2019

Personalized Recommendation



PARK AVENUE DIY

DESIGN IT YOURSELF

2018

App based Customization

MTAILOR

2020

Digital Body Measurement



Contactless Payment

Style Advisory - Using AI/ML - Using Advanced Machine Learning

NETFLIX

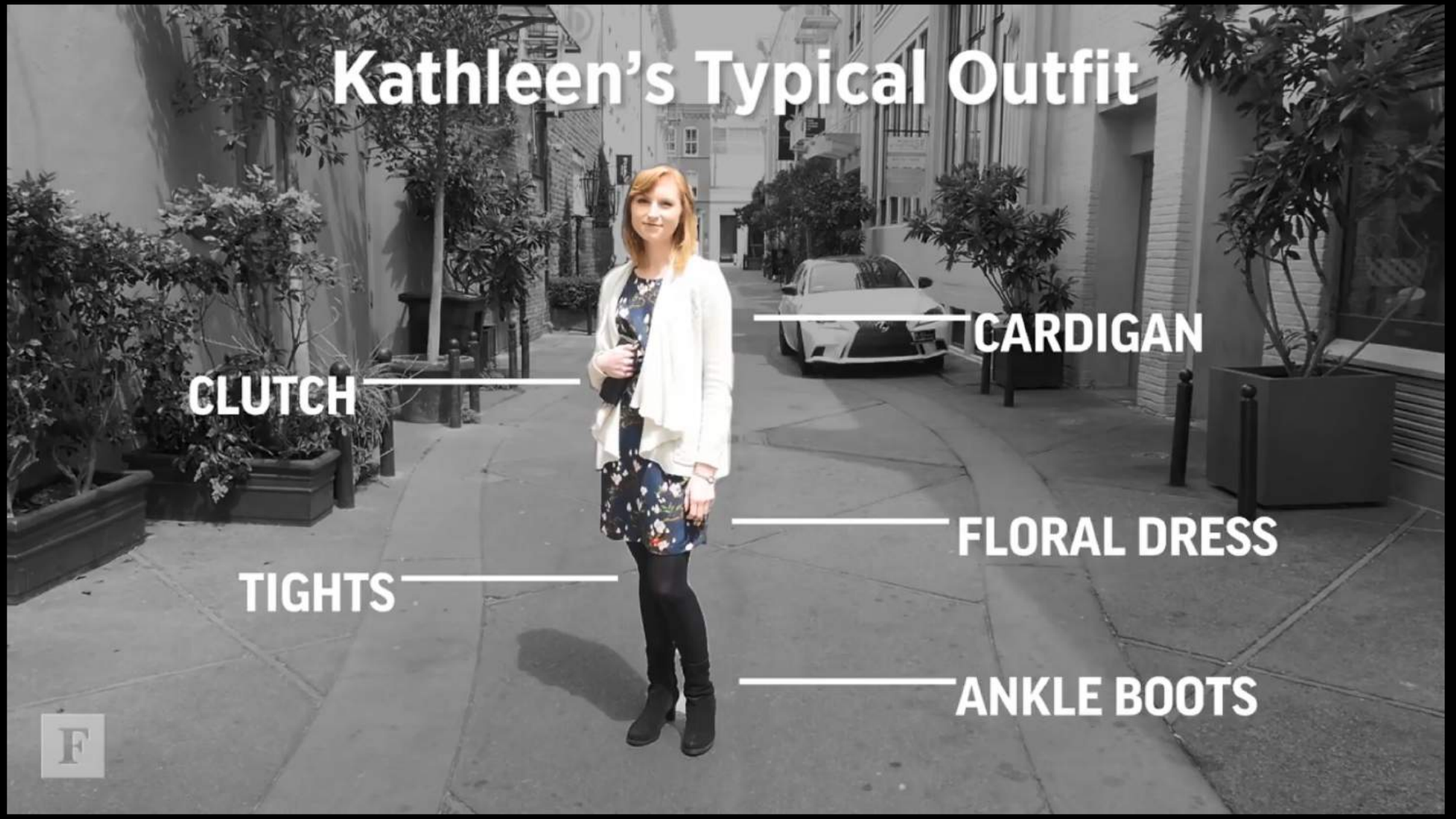
Recommends Movies based on

- Past Interactions with Netflix
- Time of Watching
- Genre

Style Advisory

Recommendations based on

- Previous Purchases
- Missing in Wardrobe
- Latest Trends


Kathleen's Typical Outfit
CARDIGAN
CLUTCH
FLORAL DRESS
TIGHTS
ANKLE BOOTS

Already Existing

On Horizon

3D Printed Accessories

INSCRIB3D

CUSTOMISED 3D PRINTED ACCESSORIES

2018

Personalized Offers

Nucleus.Vision

2019

Personalized Recommendation

STITCH FIX

2021

PARK AVENUE DIY

DESIGN IT YOURSELF

2018

App based Customization

MTAILOR

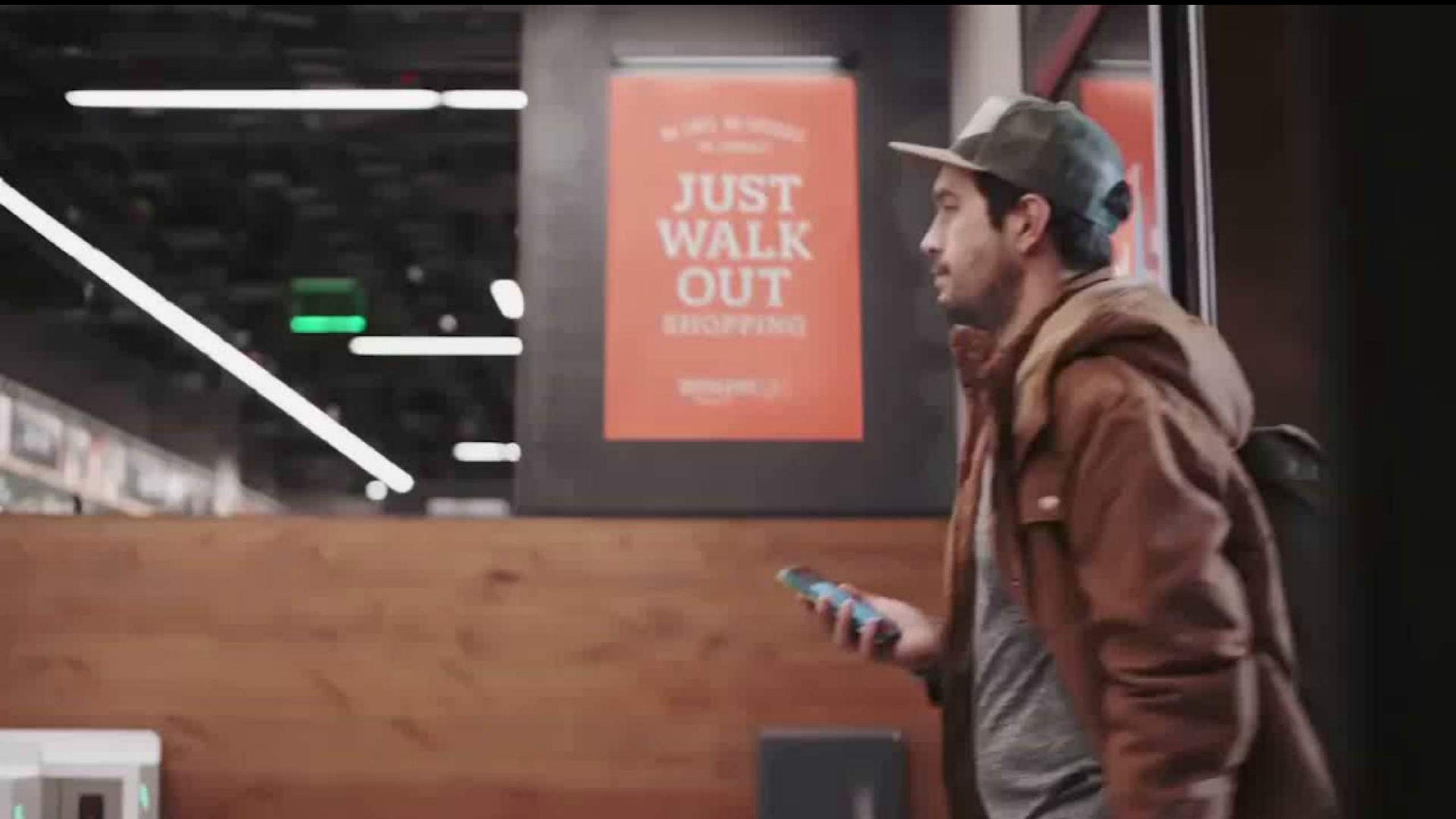
2020

Digital Body Measurement



Contactless Payment

Contactless Checkout


JUST
WALK
OUT

Already Existing

On Horizon

3D Printed Accessories

INSCRIB3D

CUSTOMISED 3D PRINTED ACCESSORIES

2018

Personalized Offers

Nucleus.Vision

2019

Personalized Recommendation

STITCH FIX

2021

PARK AVENUE DIY

DESIGN IT YOURSELF

2018

App based Customization

MTAILOR

2020

Digital Body Measurement

amazon go

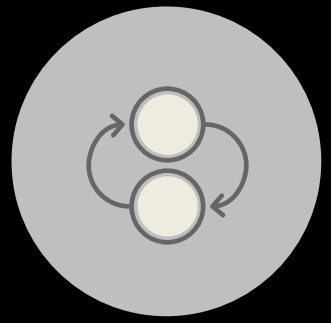
2022

Contactless Payment

We have committed to deep dive in these areas



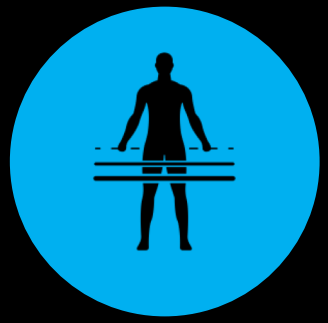
Advisory



Rental



Customization



Digital Measurement



3D printing



Sustainability

Scale 'Disruptors' at Edges

- Don't mix with Core Business
- Skunk work method
- Starve the edge
- Overseen directly by CEO and Board

Seize the Imagination of Top Leadership!!





3D printed lifestyle products





Eliminating Physical Retail



Selling Looks & Experience

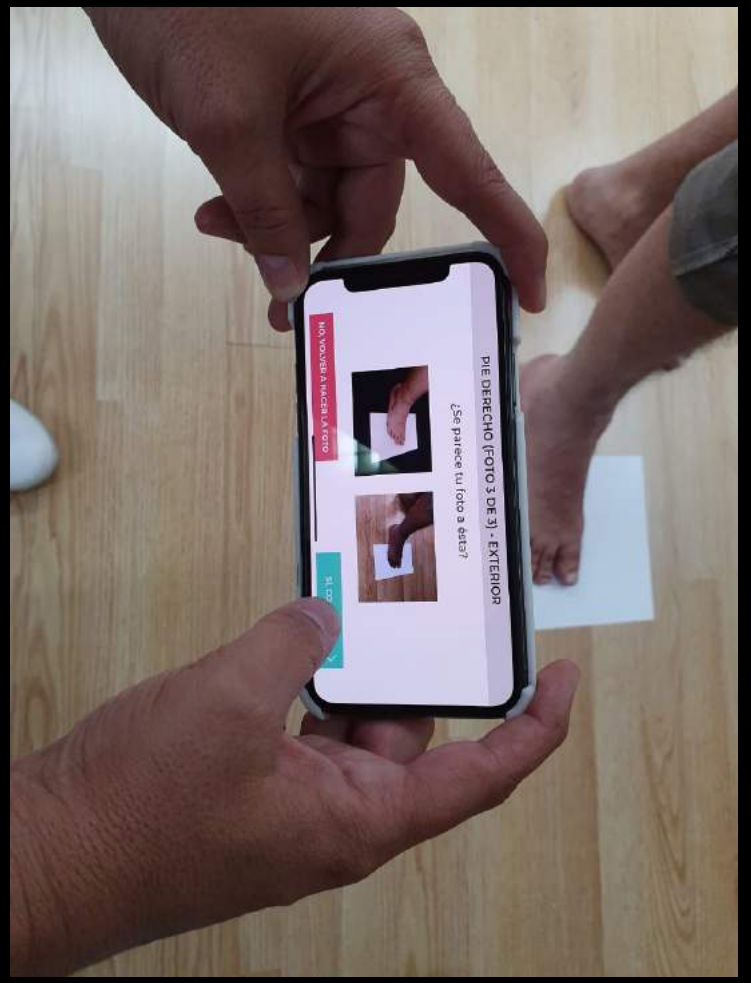
Customized Shoes: Visit to Almansa, Spain



Measurement Process



Simple 1-click on Mobile



Customization Options

3 Steps to Self-Disrupt



Envision

Purpose



Digitise

Value Chain

3

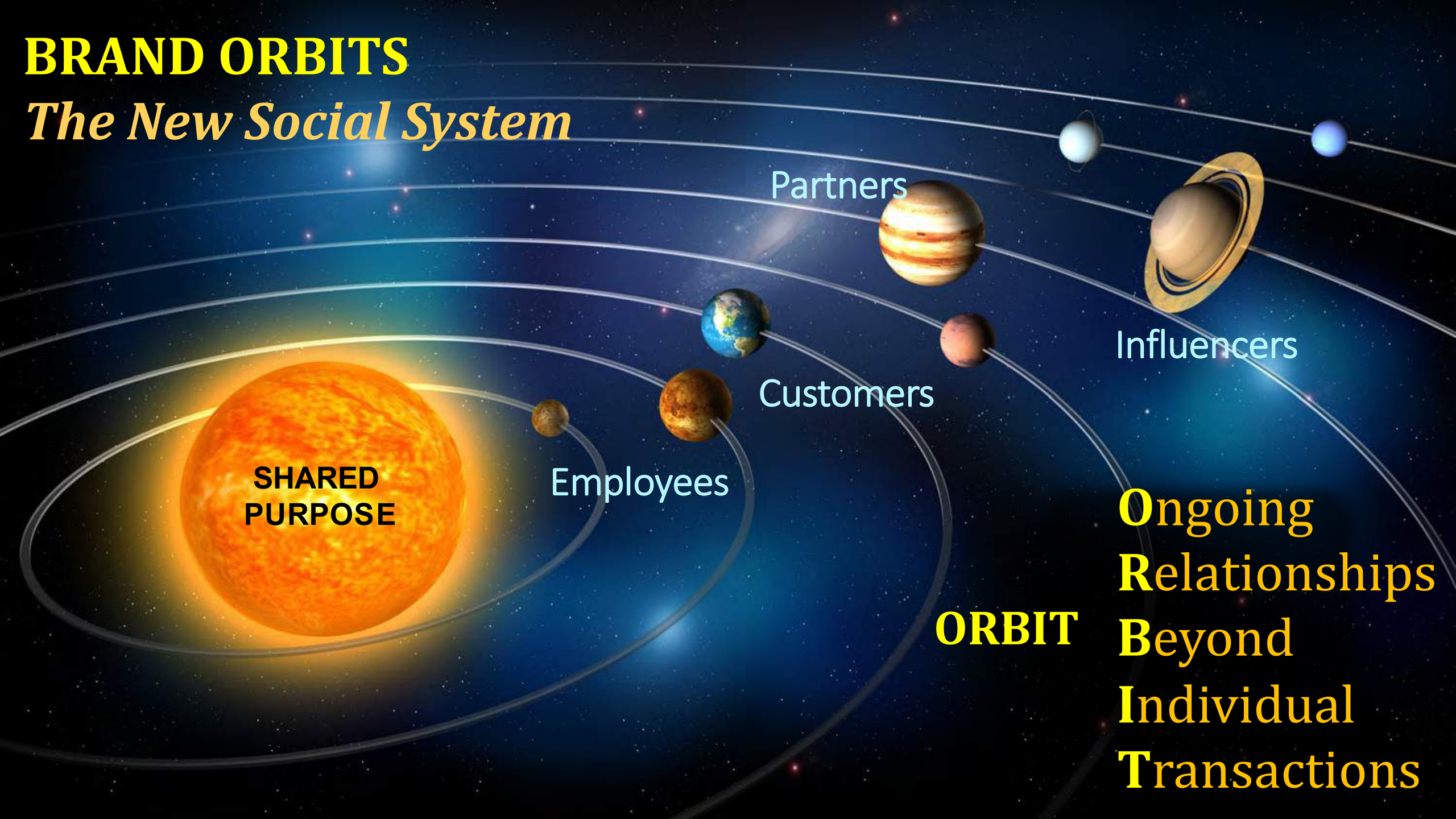


Build

Orbits

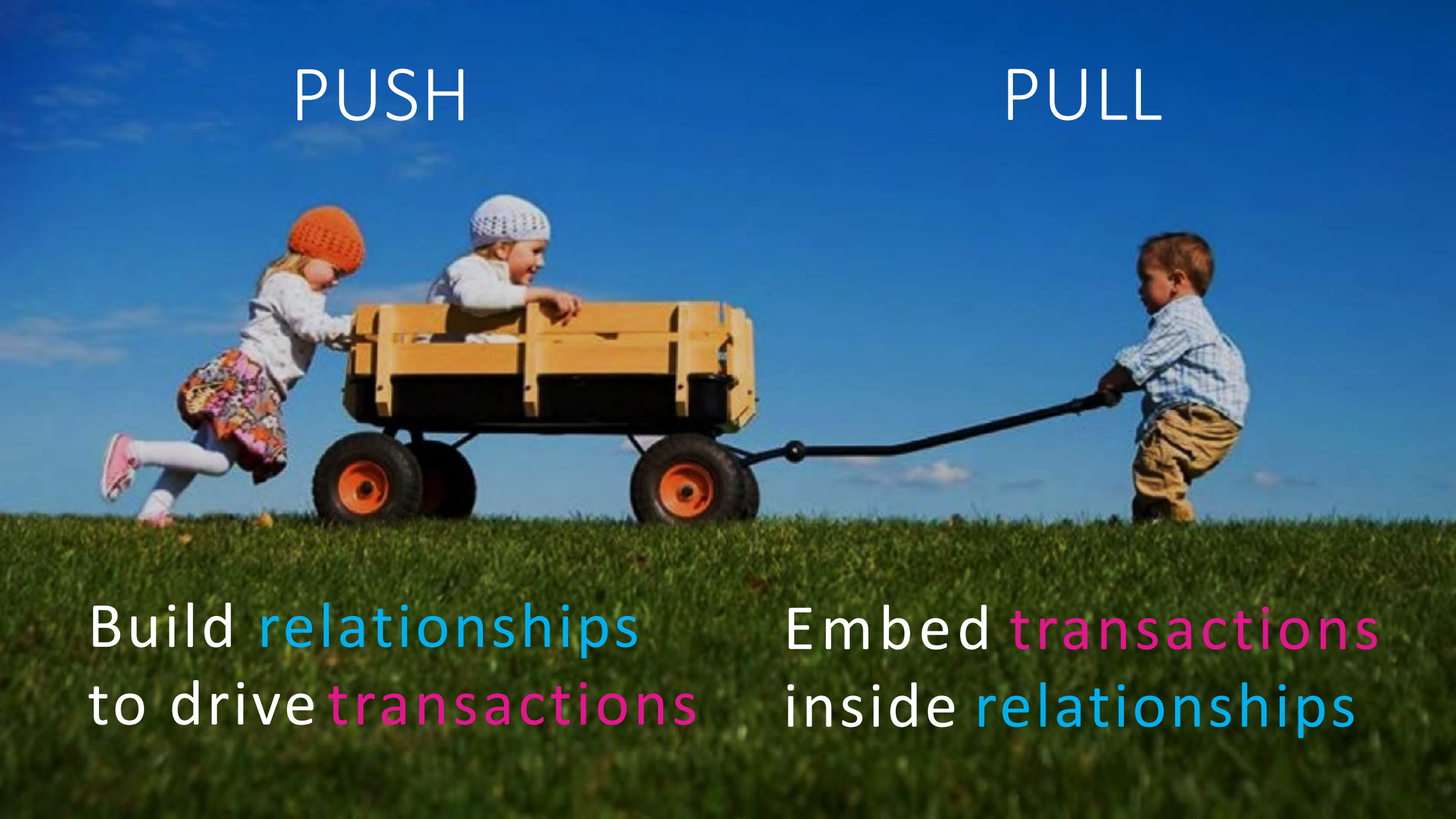
BRAND ORBITS

The New Social System

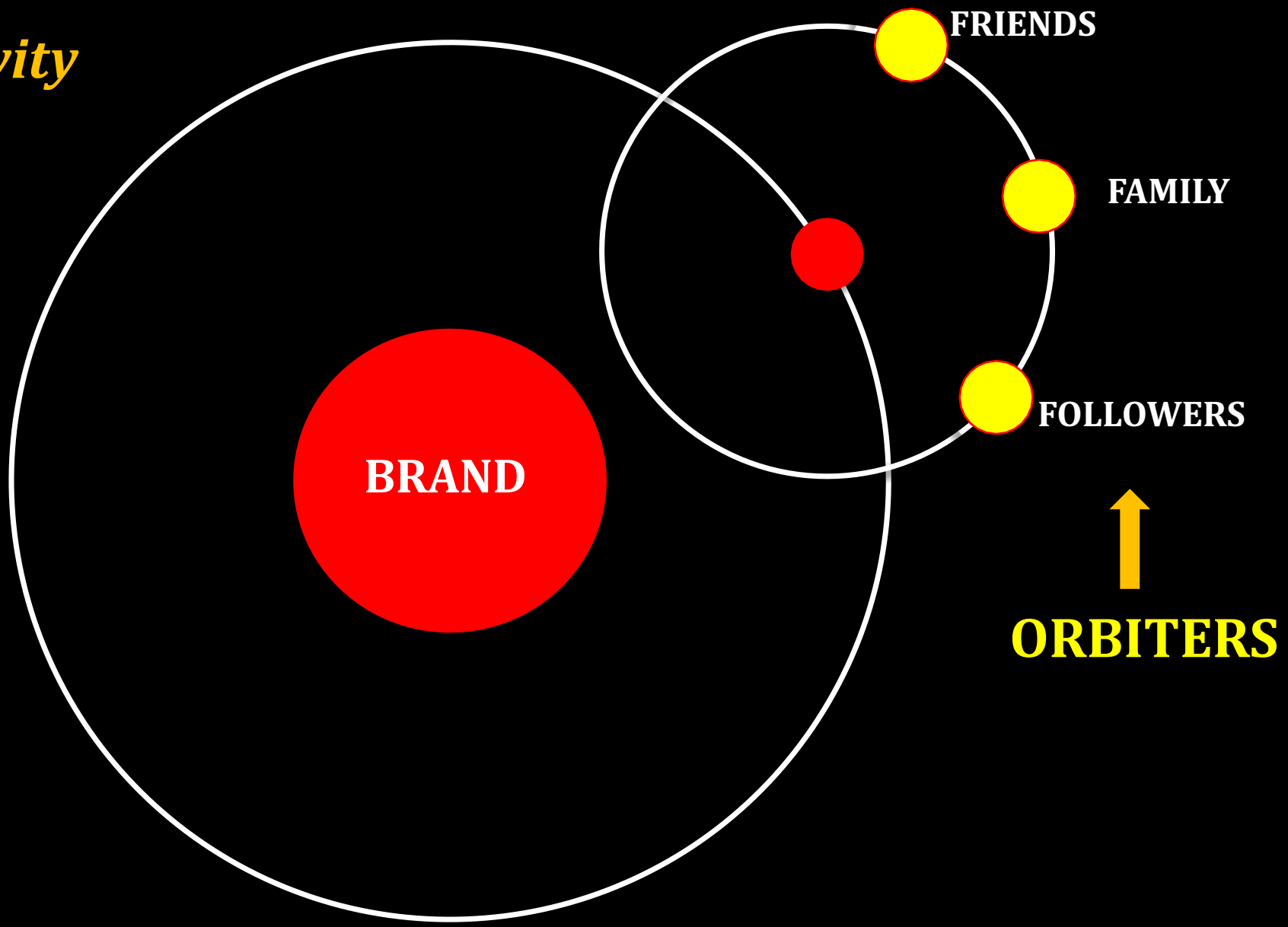


ORBIT

Ongoing
Relationships
Beyond
Individual
Transactions


PUSH
PULL
Build relationships
to drive transactions
Embed transactions
inside relationships

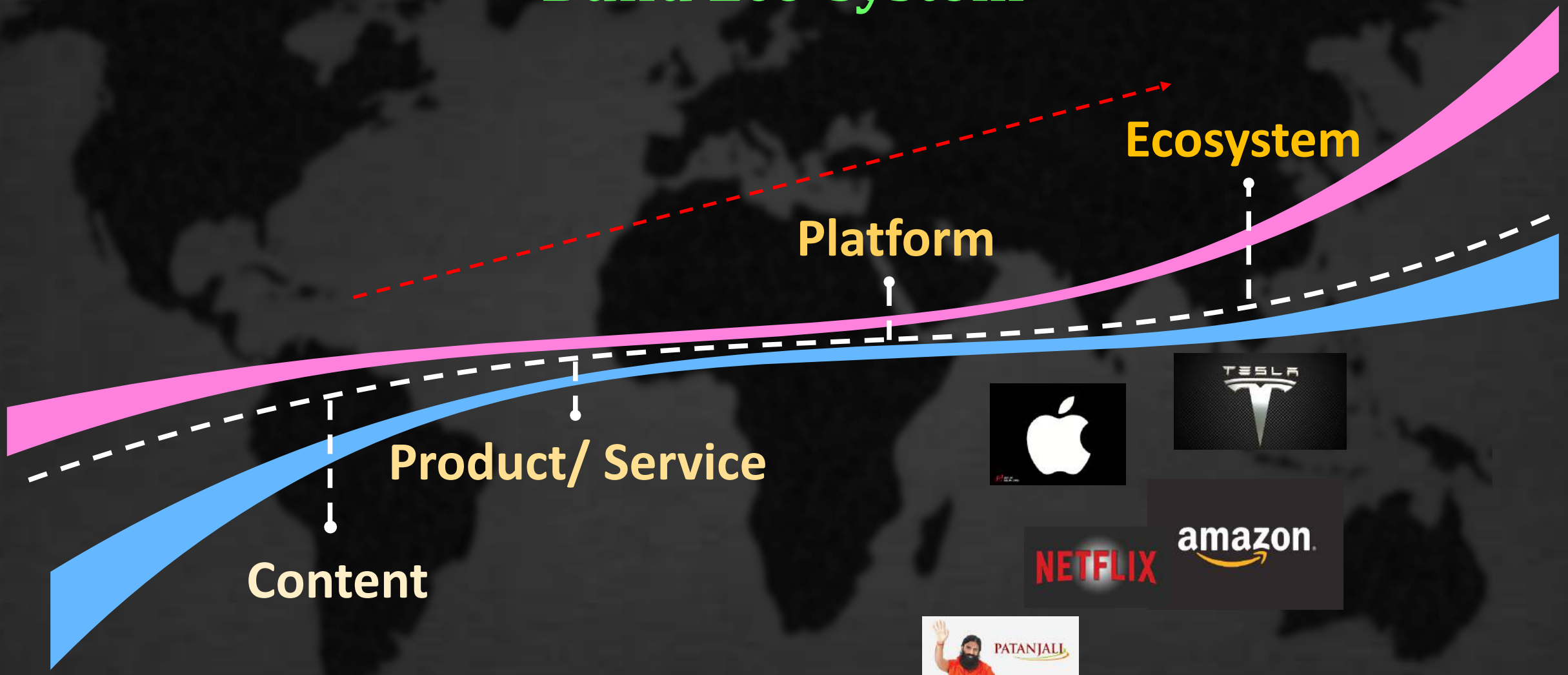
Advocacy
Build their gravity



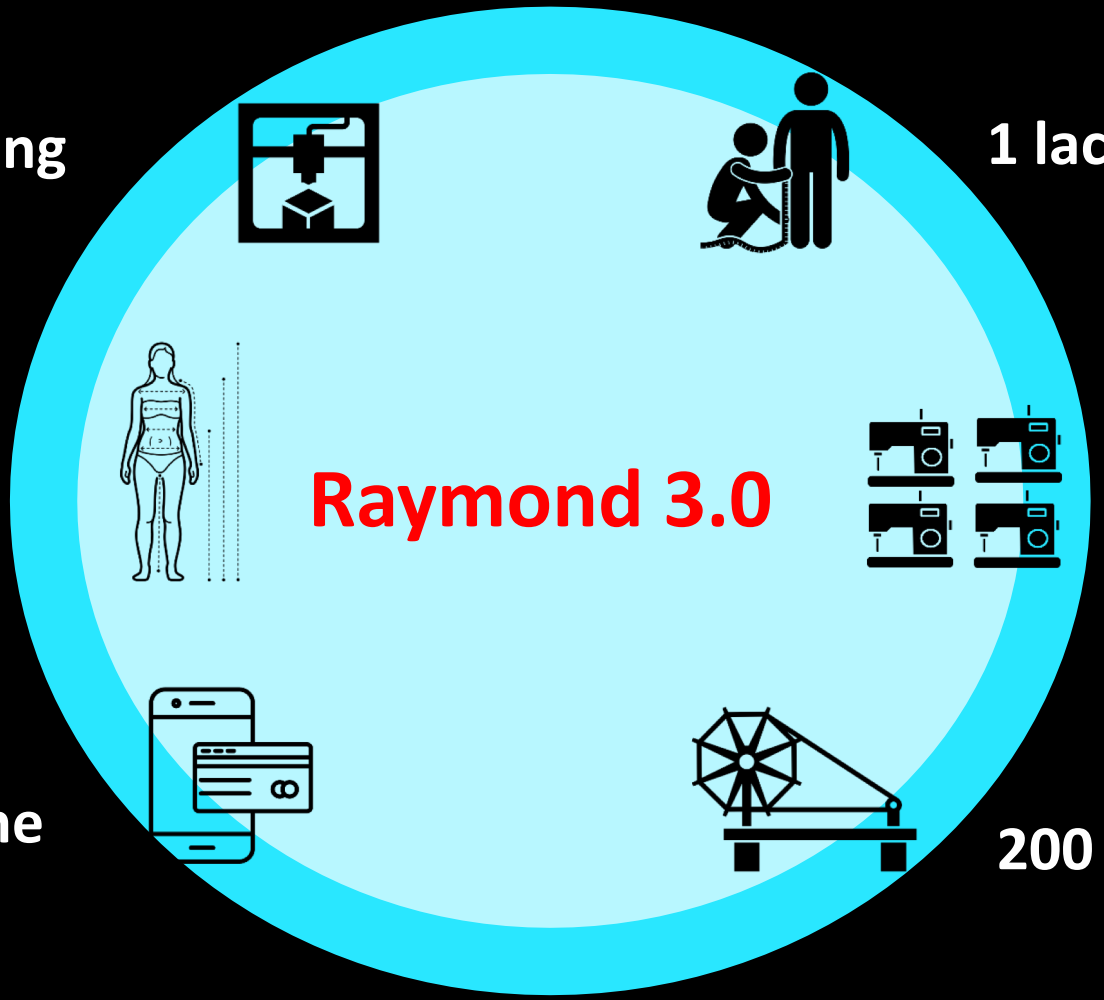
Competing on Gravity



Build Eco-system



Brand Orbit beyond 2020 – WIP Framework of a few facets



3D Manufacturing

1 lac Tailors

Digital Body Measurement

75 Tailoring Hubs

21 Cities Online Tailoring

200 Khadi Artisan Clusters


STORY
NARRATIVE
Why Should I Buy Something From You?
Why Should I Have a Relationship With You?
What Will I Get If I Do?
Who Will I Be If I Do?

RAYMOND 3.0 VALUE MULTIPLIERS



PLATFORM

10X **Growth** by connecting supply and demand



COMMUNITY

10X **Engagement** by fostering peer exchange



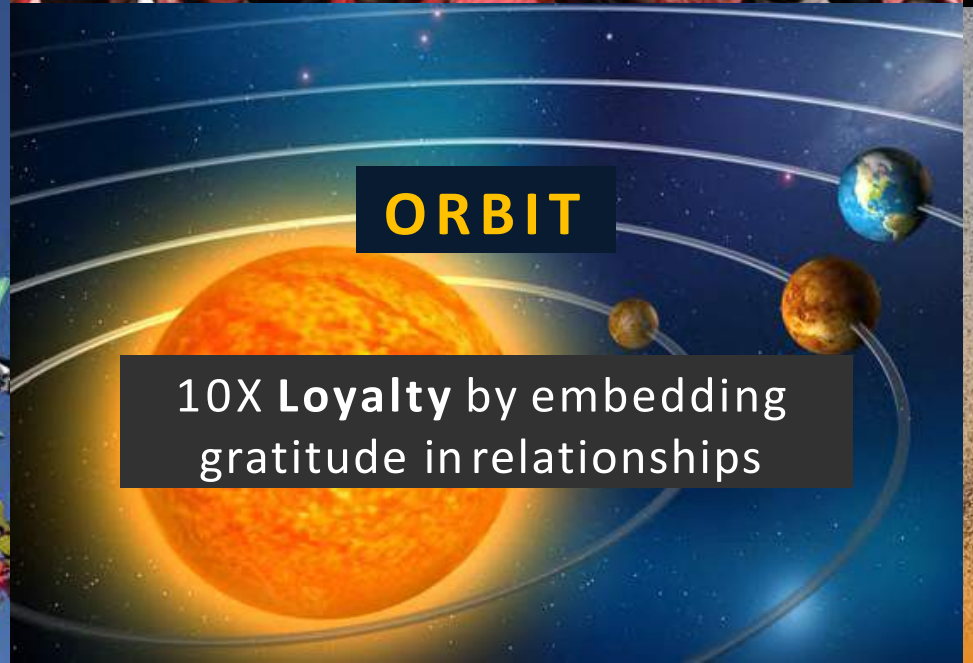
NARRATIVE

10X **Commitment** by mobilizing shared purpose



NETWORK

10X **Speed** by connecting resources and insight



ORBIT

10X **Loyalty** by embedding gratitude in relationships



DOCTRINE

10X **Agility** by empowering decision-making

(C) Shift Thinking

3 Steps to Self-Disrupt

1



Envision

Purpose

2



Digitise

Value Chain

3



Build

Orbits

Digital Disruption

Nos. in Billion

	2010		2020	2030
Population using Internet	1.2	+3.8 bn →	5	~ 100%
Internet Connected Devices	0.6		11	1 Trillion

99% Disruption Ahead

Internet = Global Nervous System


What's Dangerous
Is not to Evolve

The greatest danger in times of turbulence is not the turbulence



It is to act with yesterday's logic.


the biggest risk
is not thinking
BIG ENOUGH